

CATHOLICISM, SOCIAL VALUES AND THE WELFARE SYSTEM IN SPAIN

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1. Introduction

Spain entered the 21st century as a late but already consolidated parliamentary democracy with a service-oriented economy, a fairly rigid labor market including considerable groups of people affected by vulnerable employment, an ageing society and a mature welfare. In spite of the steep decline of fertility rates –which rank among the lowest in the world–, the fast rise of immigration since the mid 90s has boosted the Spanish population from 40 million to 47 million inhabitants.

In the mid 70s of the past century, after the death of General Franco –who had ruled the country since the end of the Civil War (1936-39)– reformist elites belonging to both the authoritarian regime and its political opposition engaged in negotiations to steer a peaceful transition to democracy. This process established a bridge between the old and the new regime allowing for endogenous institutional change without breaking the principle of legality and the rule of law, and was facilitated by King Juan Carlos who had been appointed by Franco as his successor in the position of chief of state. The 1978 Constitution established a parliamentary monarchy and opened the door for a new territorial organization of the state (*estado de las autonomías*) which has taken the institutional shape of seventeen autonomous communities, each one with extensive legislative and executive powers (particularly in the realm of education, health care and social services). Strongly decentralized and poorly integrated, the Spanish territorial model has been defined by some observers as “asymmetric federalism” because not all autonomous communities enjoy the same rights vis à vis the central state. Furthermore the process of devolution is still open, partly in response to the conflicting demands of the nationalist parties.

Only two national parties have been able to lead the central government: the *Partido Socialista Obrero Español* (PSOE) and the *Partido Popular* (PP). The PP, though not being a Christian-democratic party, is nearer to the Catholic Church, especially regarding family and education issues. The proportional electoral system overrepresents large parties; small parties tend to be organized at the subnational level, either with a nationalist or regionalist orientation. Nonetheless, a highly concentrated vote grants them representation in the national bicameral parliament, and they often wield a fair amount of power as allies supporting the minority governments led by one of the two big national parties.

Spain has been hard hit by the current financial and economic crisis, which once again has taken unemployment to the staggering rate of 20% of the active population (close to five million people), which doubles the average rate of the European Union. Rising unemployment and a severe GDP drop have strained the welfare state, specially the Social Security accounts, which have to face the dramatic increase of unemployment benefits and income transfers in the face of diminishing workers’ contributions and inputs from taxes. In this context, a rise in the share of social expenditure to GDP may be expected, presumably reducing the social expenditure gap between Spain and the EU (20.9% and 26.9% of GDP in 2006)¹.

¹ *Statistics in Focus* 40/2009 (Population and social conditions).

In such critical situations the role of the families as welfare providers becomes even more noticeable. In spite of the state's growing weight in the welfare system during the last fifty years, Spanish families continue to play a crucial role as welfare-producing cells: sharing resources to buffer the impact of unemployment among their members, helping each other to muddle through, and providing care for their dependents. They thus constitute a pillar of social cohesion that both supplements the welfare state and compensates for its shortcomings.

The purpose of this paper is to describe and explain the role played by Catholicism in the development of the Spanish welfare state, to ascertain if a religious tradition was “welfare state-productive”, or rather “welfare system productive”, and, in that case, to highlight the specific ways in which it contributed to both the genesis and the advance of such system. Our preliminary answer to this research question is that Spanish Catholicism has been –and still is– a welfare state productive religious tradition, and that its contribution to the making of the welfare system has been many-sided.

We stress three contributions of the Catholic Church and Catholicism by and large. First, the Church has contributed to building a welfare institutional infra-structure (schools, hospitals, asylums, orphanages...) both before the rise of the welfare state and in parallel to its development; this infrastructure has been accommodated within the welfare system as a private branch of service provision.

Second, Catholicism has played an important role as a cultural idiom during the nearly four decades-long Francoist regime, which was the period in which the Spanish welfare state effectively took-off. Nowadays, in a context of mounting secularization, religious pluralism and religious privatization, it is easy to underrate the influence that Catholicism exerted in Spain's public life in the past century, particularly in the first half. However, after the Civil War, Catholicism became both the state religion and the ideological common denominator endorsed by all the political families (Phalangists, the military, conservative monarchist and different strands of Catholics) that participated in the politics of the elite's “limited pluralism” (Linz 1970; Tusell 1988). Under the Francoist regime, Catholicism was so pervasive that all institutions and policies carried a catholic stamp, even if policy makers did not explicitly belong to a catholic faction. In addition, fiscal conservatism during Francoism kept social expenditure low and left ample room for the Catholic Church to expand welfare infrastructure, particularly –but not exclusively– in the educational sector.

And third, throughout the development of the welfare state, the Church has also played a major role as both a provider of social assistance to the poor, and as a lobby on behalf of the very poor and insufficiently protected by the welfare state. Within the Spanish civil society, specific Church organizations stand out as advocates for social inclusion and vehicles for granting basic aid to marginalized groups.

In the first part of this chapter we sketch the development of the Spanish welfare state, characterizing the main stages in its development and the role played by the Catholic Church in each phase. We then point to the historical course of the Church and its cultural influence on the social values underlying the welfare state. In the third part, we look at the institutional structure and the functioning of the welfare system pointing at current difficulties and challenges. Finally, we recapitulate our argument and develop some concluding arguments that may stimulate further research.

2. The development of the Spanish welfare state

2.1. Early steps in the emergence of a modern welfare state

Initiatives to design welfare policies in Spain can be traced back to the end of the 19th century. In the context of political and economic crisis after the loss of the last Spanish colonies in America (1898), the “social question” gained public saliency. According to outstanding intellectuals of that time, the modernization of agriculture, the encouragement of industrialization and public works, and the development of a social protection system to cover risks of poor peasants and workers became the keys to Spain’s “regeneration” (Comín 1999; Costa 2009).

The establishment in the early 1880s of the *Commission for Social Reform*, a nationwide network of committees in charge of researching the social situation of workers, is usually taken as the welfare state inception in a country where social assistance was provided by a multitude of workers mutual funds, trade organizations, religious congregations and associations, firms with collective prevision funds, and municipal and provincial hospitals and shelters for the poor, the sick and the elderly. From the *Commission’s* enquiries developed the *National Institute for Social Reform* (1903), soon renamed *National Institute for Social Prevision* (1908), which designed the first voluntary workers insurance policies.

The Catholic Church, whose leading role in charity as a public service had been recognized in the 1851 Concordat with the Holy Sea, was present from the start of public initiatives geared towards the creation of a social protection system. The 1876 Constitution had established a “liberal” political system in the form of a constitutional monarchy, nevertheless declaring Catholicism as the religion of the Spanish nation. During the last decades of the 19th century the number of priests, monks and nuns experienced an extraordinary increase. Thus, for instance, between 1888 and 1900 the nuns more than doubled (from 17.600 to 42.300), an increase concentrated on foundations devoted to “active life”, mainly education and assistance (Montero 2002: 120).

This expansion of Catholicism notwithstanding, Catholics were not able to found a party, mostly because of the political division between “integristas” and “possibilistas”, the latter following the doctrine of Pope Leon XIII according to which the Church should try to enlarge its social influence accepting the existing political structures. In any case, the Catholic Church’s privileges and large social presence intensified opposition by liberal elites and occasionally spurred anticlerical manifestations in the big cities. Conflicts and competition between Church and state arose primarily in education. In contrast, collaboration and consensus were more usual in the realm of the so called “social action”. This type of cooperation between church and state was strengthened by the the encyclic *Rerum Novarum* (1891), based on the premise that the state should subsidiarily intervene in society and act as a third actor in the welfare system, together with the Church and other social institutions, establishing the legal framework for social assistance, supporting private initiatives and avoiding extreme injustice (Gallego 1984; Perfecto 2006).

In the logic of social Catholicism, the Spanish Church hierarchy began to organize congresses to expound and publicize the tenets of “catholic action”, a much more ample and

demanding social intervention than “charity” (*beneficencia*). New organisations and activities such as the Catholic Workers’ Circles, agrarian trade unions, rural savings funds, professional unions or crafts unions were some of the products of this renewed catholic movement (Montero 1986; Maza 1987).

The foundational phase of the Spanish welfare state in the last decades of the 19th century and the first decades of the 20th set the country along a path of institutional accommodation with the Church. Guillén (1990, 1997) has explained the origin of the Spanish welfare state as a result of a convergence of ideas among political and bureaucratic elites, rather than as an effect of economic development, workers’ demands or the representation of societal interests by political parties, as suggested in the Rokkanian explanation put forward by Van Kersbergen and Manow (2009). The influence of these ideas built on the already sound consensus among elites in favour of a limited intervention of the state in pursuit of social harmony.

In the period of political turmoil that characterized the 1920s and 1930s, the progress of the Spanish welfare state was rather limited. In this area the main outcome of Primo de Rivera’s military dictatorship (1923-1930) was a compulsory maternity subsidy for low income women workers. During the Second Republic (1931-1936) plans to unify social insurance programs into a single compulsory system to cover sickness, disability, maternity, death and labour accidents could not be accomplished before the start of the Civil War in July 1936. Thus, during the first third of the 20th century, a period of political and social turmoil in which different political regimes (a constitutional liberal monarchy for more than twenty years, a military dictatorship for less than seven years and a republican regime for about five years) followed each other before the outbreak of warfare, the development of the Spanish welfare state was sluggish and uncoordinated. Families and non-state institutions –first and foremost the Church– took definitely precedence in the Spanish welfare system during much of the first half of the Spanish 20th century.

2.2 Welfare state expansion under a confessional non democratic regime

The dictatorship General Franco established after his victory in the Civil War was from its origins strained by a tension between its statist and its catholic components. Statism was in the first years of dictatorship anchored in the principles of fascism and represented by the single party, first called shortly *Falange* and later (predominantly since the 1950s) *Movimiento*. By contrast, political Catholicism had a long tradition in Spain and was tightly associated with conservatism. Being one of the losers of the policies enacted during the Second Republic, the Catholic Church firmly supported the *pronunciamiento* led by General Franco in July 1936. In the eyes of the Church hierarchy the extreme violence suffered by the clergy and by churchgoers on the Republican territory during the Civil War (around 7.000 priests and nuns and 3.000 members of secular religious organizations were assassinated) justified the declaration of the three-year long conflict as a “crusade” against evil.

In his strategy to lay the foundations of the new regime already before the end of the war, Franco signed in 1938 the Code of Labor (*Fuero del Trabajo*) which contained the “statements inspiring the social and economic policy” of the new Spanish state. This Code, inspired by similar doctrinal documents of German and Italian Fascism, recognized nevertheless the importance of Catholic ideas. Thus, the state’s “task of guaranteeing

Spaniards fatherland, bread and justice” was couched in the general goal of renewing “the Catholic tradition of social justice”. The Code defined the family “as the natural primary cell, society’s foundation and simultaneously a moral institution with inalienable rights above any positive law”. In line with this argument, it declared the will “to free married women from the workshop and the factory” and to establish family subsidies. This relevance of the family notwithstanding, the Code concentrated on the state’s responsibility to protect workers through the increase of benefits covering “old age, disability, maternity, work injuries, professional illness, tuberculosis and forced unemployment”, with the aim to implement “a total insurance”.²

After Franco’s victory, the Church became a cornerstone of the dictatorship. The regime’s need of Catholicism in order to reinforce its symbolic legitimacy gave the Church a huge influence in politics, policies and society (Pérez-Díaz 1993). But the Catholic doctrine, and particularly the subsidiarity principle emphasizing the primacy of Catholic society over the state and conceiving of state intervention as a secondary resource, was at odds with the nationalist revolutionary goals proclaimed by the political elites adhering to the phalangist doctrine, which strongly emulated fascist ideology and political practices.

This tension was intense during the first years of the Francoist regime. It lessened after the defeat of the Axis powers in the Second World War when Catholic elites and their ideology gained notoriety in government following the aim to approach the winning Western democracies. But by 1945 the fundamental pieces of Francoist social policy had been laid down by the statist elite. The Ministry of Labor, which General Franco had assigned to the phalangists in his policy of distribution of power among “regime families”, managed to get the main competences to design and implement social policies. A flat-rate old age subsidy was approved in 1939. In 1942 obligatory health care insurance for all “economically weak producers” was established by law and health care provision was assigned to the phalangist sectoral trade unions. Five years later a decree laid down the old age and disability insurance, but its organization and management were no longer attributed to the single party trade unions but to the *Instituto Nacional de Previsión*, forerunner of an Institute for Social Security. While declaring its claim to set up a unified social insurance provided by this public institute, the regime allowed the development of the so called work mutualism, mainly controlled by the trade unions. Thus, the Francoist regime designed and launched new welfare programmes within state corporatist structures, linking welfare to work.

The introduction of these social measures served to reinforce the regime’s symbolic legitimacy mainly based on the military victory and the Church’s backing. Even diplomatic officials of Western democracies interpreted these social policies as a sign of convergence, noting that in this realm Spain was “following a somewhat parallel path to that followed by other nations of the European West, albeit its poverty and lack of experience and foreign aid”, while adding that all this could be “very convenient if one day the moment arrives to bring Spain to a tighter association with the Western Union powers” (Cazorla 2000: 136).³

Despite this preference for state’s institutions as providers of workers’ welfare, the Church managed to maintain its grip on education. After the end of the Civil War, it resumed and

² *Fuero del Trabajo*, 9th March 1938.

³ These comments were sent by the British Embassy in Madrid in July 1950.

expanded its educational activities, with masculine religious orders specializing in the education of boys, and feminine religious orders in the education of girls. Though some religious orders directed their educational activities to the poor, most religious schools catered for the middle classes, offering them private or so-called “paid” schools (*colegios de pago*) that provided an education of both quality and prestige, much more appreciated than the one offered by “public schools” (*colegios públicos*).

Furthermore, whereas the management and the discourse of public social protection in the 1940s and 1950s was shared by the Ministry of Labor and the so called Trade Union Works (*Obras Sindicales*), the Church prevailed in the sphere of non-state social relief through different religious groups and associations providing social services under the mighty umbrella organization *Acción Católica*, which also included Catholic workers’ associations.⁴

In general, the Church concentrated efforts in supplementing in a non-competitive manner, state benefits and insisting on the importance of social justice as a Christian ideal and of a social order based on the family and Catholic morality. In this regard the Spanish Church was in fact very successful. Francoist political families often fought each other, but independently of which of them held government, the regime never abandoned Catholic values as an ideological reference and as a support for its policies. National Catholicism remained, particularly after 1945, a common ground for elites, whether military, phalangist or technocratic. Even the 1958 Law on the Principles of the *Movimiento* praised compliance with God’s law, as stated by the doctrine of the Holy Catholic, Apostolic and Roman Church, and proclaimed its inspiring influence on legislation. Maybe Francoism lacked an ideology, as it has been frequently argued, but the coexistence of different “cultural idioms” underpinning state power (Skocpol 1985) should not conceal the fact that the one embodied by the Church’s hierarchy was prevalent at least until the 60s.

Specifically the stress on the family, a key component of the Church’s vision of the social order, was pervasive in public narratives and policy justification. The already cited 1958 Fundamental Law defined the family as the foundation of social life and one of the basic structures of the national community (together with the city council and the trade unions). In 1961 the law creating unemployment insurance justified this new benefit in terms of the aim stated since the first days of the regime to attain in Spain the goal of “no household without stove and no family without bread”.⁵

As a matter of fact, the 1960s were the most important period of Spanish welfare state institutional design. Rapid economic development since the late 1950s going hand in hand with industrialization and urbanization set the structural conditions under which the Francoist regime decided to develop a bigger and more coordinated welfare state. For elites willing to reinforce the power and image of an effective and efficient state, the establishment of Social Security in the 1960s was seen as an opportunity to push forward administrative reform and increase the regime’s legitimacy at home and abroad. This was all the more necessary since the sources of legitimacy on which the regime had relied were weakening as a consequence

⁴ Among them, HOAC (Hermandades Obreras de Acción Católica) and JOC (Juventud Obrera Católica), whose members enjoyed different services related to assistance and leisure.

⁵ Law 62/1961 (BOE 24th July 1961).

of internal conflicts within Catholicism and of social changes mostly resulting from economic modernization and paving the way for the emergence of a civil society (Pérez-Díaz 1993).

But the design of Social Security in 1963 and its effective creation in 1967 were also an attempt to overcome the previous fragmentation of the social insurance system. The Francoist regime recognized the burden of a “ceaseless proliferation of norms, at the same time cause and consequence of the diversity of bodies and entities whose activities cross each other and interfere, or even overlap in the coverage of one and the same subject and identical state of misfortune with the inevitable duplicity and resulting waste of efforts”. The 1963 Framework Law on Social Security was intended to generalize protection to the working population and pass “from a set of social insurance pieces to a system of Social Security”. This transition was not merely interpreted as a technical operation, but as a “national task” with a “communitarian root”.⁶ According to the Law, Social Security integrated benefits of temporary work disability, permanent disability, death and survival, old age, health care and family protection; the primary holders of these social rights were the workers while their dependent family members were treated as beneficiaries.

Although until the end of the 1960s effective progress in the implementation of the Social Security Law was modest, the goal had already been precisely defined: without removing the contribution to social protection of other private institutions, like mutualities, Social Security should become a mighty state instrument to attain, among other aims, “income redistribution of the political community, according to criteria of justice and equity”.⁷

While the state reinforced its contribution to social welfare provision through Social Security, it allowed the Catholic Church to maintain its hold on education. The 1970 Law on General Education, which extended obligatory education until 14 years of age, designed a new education structure more in line with the usual European standards, and incorporated religious schools into the system as private providers of an education largely financed with public funds. Thus, the adoption of a policy of universal education consolidated the position of the Catholic Church in the educational sector.

In the last years of the Francoist regime the welfare state was high on the policy agenda. In 1972 a reform of the Social Security approached workers’ contributions to effective salaries, thus increasing the system’s revenues; the creation of the National Institute of Social Assistance (INAS) in 1974 was an attempt to rationalize and improve the organization of social services. Since the mid 1960s a considerable number of big public hospitals were built in the main Spanish cities and an increase in the number of health care professionals was promoted. In 1973 more than three quarters of the population enjoyed public health care coverage. By then, the Social Security system paid more than three million pensions.

This welfare state expansion went hand in hand with a shift from services to benefits: whereas until the end of the 1960s expenditure in services was higher than expenditure in benefits (in 1965, 4,8% and 3,4% of GDP, respectively), by 1970 benefits absorbed a greater proportion of public outlays than services (5,4% and 7,3%, respectively) (Rodríguez 2004: 89). Between 1970 and 1974, the last five years of the Francoist regime, social expenditure

⁶ Quotes are drawn from the preamble of the Law 193/1963 (BOE 30th December 1963).

⁷ See footnote 6.

increased from less than 9% to slightly above 10% of GDP (these figures have to be interpreted in a context of comparatively low Spanish public expenditure).⁸ Welfare production by private institutions, especially in the spheres of health care and social services, remained nevertheless important.

2.3. Welfare state consolidation under democracy: the role of the Church in today's welfare system

The universalization and consolidation of the Spanish welfare state during the 1980s, 1990s and 2000s has built on the foundations of the 1960s, with the more or less enthusiastic support of all political parties. In the deeply changed context of an increasingly secularized citizenry and an institutional framework of religious pluralism, the Spanish Catholic Church has continued to participate in public debates on welfare (particularly in education) and to provide an important portion of services in the fields of education, poor relief and social assistance.

During the transition to democracy public social expenditure rose notably and in 1985 it represented 20% of GDP (Barrada 1999: 548). However, the fact is that constitutional symbolisms and the social expenditure increase of the late 1970s and early 1980s notwithstanding, the basic institutions of today's Spanish welfare state were founded in the 1960s. At that time the prospects for democracy in Spain were far-off, Franco's dictatorship enjoyed considerable public support (even if facing opposition among intellectuals and industrial workers) and the leverage of the Catholic Church as a political and social institution and of Catholic religion as a central cultural idiom was significant.

As it is well known, the Spanish transition to democracy was not designed as a radical break with the past, establishing a sort of *tabula rasa*, but as a political and social pact to change, peacefully and in a consensual manner, the political system. Changes in the design and performance of many public institutions remained, at least in the first years of democracy, incremental and limited. This was the case with Social Security. Institutional continuity was not only a consequence of mere path dependency, but of the political will of the transitional elites, part of which had held important posts in the Francoist state during the last decade of the dictatorship.

It has been argued that even though the Francoist regime tried in the 1960s to build a system of Social Security, this aim did not succeed because the system was not inclusive of the whole population and remained fragmented (Alarcón 1999); workers were classified in different schemes (organized by professional categories, with benefits varying widely across categories) and institutions in charge of social protection were manifold, including employers' mutualities and workers' mutual aid associations. But in fact, if one takes incomplete coverage and fragmentation as definitional criteria, it then has to be admitted that the Spanish Social Security system remained imperfect well beyond the transition to democracy.

⁸ In 1970 total public expenditure amounted in Spain to 22% of its GDP. In the same year, the Italian state spent 34% of its GDP, while public expenditure in Germany (West) and the United Kingdom come up to 40% of their GDP (Barrada 1999: 51).

There was certainly ample agreement among the new political elites of the late 1970s and early 1980s on the necessity to boost social expenditure, controlling, at the same time, its effects on inflation. This was done through a series of social pacts that included the trade unions and the employers' federation, and sometimes the government. The political will to expand the welfare state and try to lessen the gap with other European countries was well in place before the Socialists (PSOE) won elections in 1982, with a party manifesto which emphasized the need to enlarge the welfare state and underline its prevalence within the welfare system. Nevertheless, the deep economic crisis during the 1980s set limits to these electoral commitments and the first important norm approved by the Socialist government was the pension reform of 1985 which rationalized benefits, but implied a substantial cut in new pensions. One year later health care was universalized by law, so that access to health institutions was no longer dependent on kin relationship to a worker, but on individual rights. By then, however, access to public health was so widespread that universalization did not imply a big expenditure increase.

Universalism was also invoked when the third Socialist government introduced a programme of non-contributory benefits in the early 1990s, which established within Social Security a system of non-contributory and means-tested old age, widowers' and family benefits (that is, not linked to work contributions and trajectories). Then, in 2006, the approval of the so-called Dependency Law, aimed at creating an extensive and mainly state-financed system of support (in form of benefits and social services) for people needing help to carry out their daily activities, underlined, once again, the will of the Socialists to enhance the core position of the state in the welfare system.

But the state is only one part of the picture. As of today, the Spanish Catholic Church remains a major agent in three welfare provision areas: education, poor relief and social assistance. The development of state welfare policies since the late 19th century has not completely come to crowd out the activity of religious organizations in these three fields; rather, both agents have come to an accommodation by which religious organizations accept state regulation of their welfare services in exchange for strong public financial support.

The presence of the Church in the educational sector is particularly strong for two historical reasons: the delay in the development of a national system of public education, particularly in the area of secondary education, and the ample room that the Church enjoyed under Francoism to expand its educational sector, compensating for the lack of public schools. Up to 1970, religious schools were financed by family fees, but as a consequence of their integration into the system of public education the state began to sustain their activities, paying the salaries of teachers and other running expenses.

With the arrival of democracy, the funding of the church educational sector by the government continued, but governments tried to curtail the institutional autonomy of religious schools by limiting their leeway in the shaping of the educational curriculum and in recruiting their pupils, as well as the authority of school owners in school management. The Church has opposed these moves to curtail its institutional autonomy, and the battle for control has not finished yet, as shown by the recent conflict between the Church and the Socialist government of Rodriguez Zapatero, motivated by the introduction of a new subject

(Education for Citizenship) as an obligatory subject in the school curriculum as an alternative of sorts to the teaching of Religion.⁹

As regards social services, the leading role of certain religious institutions is recognized by the Spanish state and society. The main Catholic organization specialized in poor relief is *Cáritas*, founded in 1947, which in 2005 devoted nearly 170 million euros to different social projects (Conferencia Episcopal Española 2007). Embedded in the Church's parish structure, it covers the entire territory of the country and is the main institutional sensor that tracks poverty (old and new) in Spain. In the area of poor relief, *Cáritas* has historically played the role of a functional complement of the welfare state institutions because of its specialization in the interstitial realm of poverty and social exclusion, which, until recently, remained outside the reach of public provision, or was insufficiently covered by it. In this context, the relationship between *Cáritas* and the agencies of the Spanish welfare state tended to be cooperative, with *Cáritas* providing a voice for the poor, promoting research on poverty to gauge both the scope and the needs of poverty pockets while acting as a lobby to increase social expenditure directed to the poor (Gutiérrez 1993). Therefore, in the area of poor relief the Spanish Catholic Church has played (and continues to play) a dual role: as a relief provider that supplements the system of public provision, and as a *lobby* on behalf of the poor and the excluded.

Besides direct poor relief, the Church also provides social assistance in the form of social services (orphanages, asylums and residences for the old, establishments for the handicapped, etc.), most of them either provided or staffed by feminine religious orders. In those sectors, as well as in education, the activities carried out by the Catholic Church have come to depend on public subsidies, and are mostly financed by the state; and, as a result, they have been integrated, to a point, into the system of public welfare, where they have had to carve a negotiated niche within this system. However, this process of institutional accommodation has been much more conflictive in the educational sector than in the other two areas of the Church's social action (poor relief and social assistance). In other words, the dynamic of the institutional accommodation of the Church's welfare activities varies across policy sectors.

The wide array of activities that the Catholic Church carries out in the area of social assistance represents a legacy of its past social activism, and constitute a strong pillar of the Spanish third sector. Feminine religious orders play a major role in this subsector, but religious social assistance lacks the institutional integration typical of poor relief. Religious institutions of social assistance usually work in a local context and with a local horizon, and their major ambition is often sheer survival, which tends to depend on the reception of public subsidies or on public contracting. As service providers that fulfill a welfare function which is not dispensable, their relations with the agencies of the welfare state are marked by interdependence and pragmatic reciprocal accommodation. In addition, both the territorial dispersion and the local orientation of these institutions prevent them from playing the role of lobbies in the making of social policies.

⁹ Percentages of parents opting for the subject Religion in the school curriculum is very high even in public schools (70%). In private nonconfessional schools it amounts to 78% (Conferencia Episcopal Española 2007).

3. The cultural background of the Spanish welfare system

3.1 The historical trajectory of the Spanish Catholic Church and the impact of its social teachings

Religion played a major role in the formation of the Spanish state, which came out of the *Reconquista* until the end of the 15th century –a long struggle for religious political domination that lasted eight centuries, which drew out Islamic domination from the Iberian Peninsula and imposed Christian rule on the entire territory. Having originated in a struggle for religious domination, the new Spanish state assumed a marked religious activism, fashioning itself as the defender of the Christian faith not only in its own territory, but also abroad, particularly as royal alliances and conquest expanded its dominion in Northern and Southern Europe, America and even some parts of Asia. The expulsion (or forced conversion) of religious minorities (first Jews, later Moslems) put an end to medieval Spain's long tradition of religious diversity, and further reinforced the weight of Catholicism in the identity of the new kingdom.

From its position of religious monopoly endorsed by the state, the Catholic Church had ample room to influence both the culture and the behavior of Spaniards. It modernized itself to a limited but significant extent in the context of the 17th century Counter-Reformation, and it was able to contain the Enlightenment onslaught in the 18th century. In the 19th century, however, the Church found itself in a much more complicated and frail predicament, trying to accommodate to a liberal state which showed reluctance to yield to the Church's influence, while dealing with the growing disaffection of some segments of the popular classes, an incipient working class and a large mass of landless peasants with a very strong anticlerical sentiment, initially heralded by Anarchists, and later by Socialists and Communists. The decline of the liberal state in the first decades of the 20th century and the end of constitutional monarchy in 1931, with the instauration of the Second Republic, made the Church's situation even more difficult. As already stated, the Spanish Catholic Church had an active role in the Civil War as part of a coalition of Monarchists, Conservatives and Fascists known as the National Front. The religious cleavage was therefore of fundamental importance in the conflict: reverent Catholics and fervent anticlericals fought each other during three years, leaving no space for moderate Catholicism or respectful Laicism.

With the victory of the National Front and the instauration of dictatorship, the fate of the Spanish Catholic Church changed from persecution to privilege. The Francoist regime proclaimed Spain as a catholic nation, and a "spiritual reserve" in a Western world that was moving in the direction of growing secularization. The Catholic Church actively endorsed the authoritarian regime, taking advantage of the prerogatives that accompanied the status of state Church. This combination of authoritarian politics and compulsory Catholicism was known as "National-Catholicism" and it set Spain far apart from the religious pluralism of the European liberal democracies that came out of the Second World War, at least until the mid 1950s. By this time, however, socioeconomic and cultural changes of various sorts took place, and new currents developed within the church as a new generation of clerics and social activists came in.

With the recognition of the principle of religious freedom by Council Vatican II (1967), which made religious faith a matter of consciousness (and therefore personal choice),

National-Catholicism became an oddity, a motive of embarrassment for both the Vatican establishment and the new generations inside the Catholic Church that favored the *aggiornamento* preached by the Vatican Council. In this context, the Spanish Catholic Church became split between an “old guard” of recalcitrant defenders of the religious *statu quo* and the swelling ranks of those who pushed for the modernization of Catholicism and the restoration of religious freedom and religious pluralism (Pérez-Díaz 1993).

Given that the issue of religious liberty was linked to the issue of political freedom, church reformers tended to get involved in political opposition to Francoism. Since the late 1960s, growing sectors of the Spanish Catholic Church (with the help of the Vatican) maneuvered to distance themselves from the authoritarian regime (Miret 1968). This process reached a climax in the late seventies, in the midst of the political transition to democracy, when an assembly of Catholic priests publicly admitted the Church’s failure to avoid the break up of the Civil War while asking for forgiveness for her choice for one of the two fronts that fought the war (Linz 1980; Pérez-Díaz 1991).

With the arrival of democracy, the Spanish state ceased to be a confessional state. The 1978 Constitution established that no religion should have state character. The Catholic Church has therefore had to adjust to its new status as one religious confession among others in a context of religious pluralism (which strong immigration has reinforced). Nonetheless, the state participates in the financing of the Catholic Church by transferring the taxes that citizens devote to this aim (alternatively they may allocate this part of their taxes to non governmental organizations)¹⁰ and directly subsidizing many of its social endeavors.

However, the most difficult challenge to the Catholic Church in the restored democracy is the process of secularization of the Spanish society, even though a large majority of Spaniards continue identifying themselves as Catholics. In 2008 around three quarters of the population declared themselves “Catholic”¹¹. Nearly three of every ten Spaniards (28%) defined themselves as “practicing Catholics”: from these ranks come probably the majority of citizens who have opposed policies pushed forward since 2004 by the Socialist government regarding homosexual marriages, abortion or the obligatory introduction in schools of the subject “Education for Citizenship”.

From the point of view of cultural influence, Catholicism was both pervasive and overwhelming in pre-industrial times, when the economy was agrarian and most of the population lived in the countryside. With the arrival of industrialization by the end of the 19th century, secular movements such as liberalism, socialism, and anarchism challenged the cultural hegemony of the Church by putting forward alternative ideals of the good society, while fighting the Church in the political arena to curtail its economic and social power. Catholicism faced the challenge posed by those movements and the new *social question* brought about by industrialization elaborating its own version of social doctrine. The latter proposed an approach to the social problems unleashed by capitalist industrialization that differed from those of secular ideologies.

¹⁰ Around one third of tax payers marked the option “Catholic Church” in their 2005 income tax return (Conferencia Episcopal 2007).

¹¹ CIS poll 2.752, February 2008 (www.cis.es).

This social doctrine may be interpreted as a recent episode in the Church's history trying to expand its cultural influence. Before it, the Catholic Church had been instilling for centuries in both the minds and hearts of Spaniards the great values of the Christian ethos: love your neighbor, charity, peacefulness, do good and avoid evil, forgiveness, justice, etc. This Christian ethos not only had a strong civilizing effect on the mentality and the customs of Spaniards, but also contributed to influence the economic and social order while expanding a sense of moral community and keeping alive a social sensibility toward those in a state of need that lacked the means to help themselves (the poor, the old, the sick, the orphans, etc.). Charitable works to serve the needs of the destitute, as described above, were another line of influence of the Catholic Church in shaping the social and economic order. They created a religious welfare sector long before the state had the intention and the means to engage in building up a public welfare state, which attracted the donations and –sometimes– the legates of the wealthy, reinforcing a charitable ethos among them.

The Catholic social doctrine began to develop with the encyclical *Rerum Novarum*, issued by pope Leo XIII in 1891, and became specified in a series of encyclicals that were issued throughout the 20th century –*Quadragesimo Anno* (1931), *Divini Redemptoris* (1937), *Mater et Magistra* (1961), *Pacem in Terris* (1963), *Octogesima Advieniens* (1971) and *Humanae Vitae* (1967) (Guerrero, 2009: 237). This corpus of social doctrine, built upon a set of truth-premises that are considered to be part of natural law (and therefore foundational for positive law), takes as a fundamental axiom the constitutive social nature of the human person, and the centrality of the family as society's basic social cell: an institution that is both natural and universal, and that public authorities have to protect and help to carry out its functions, particularly the education of children.

Furthermore, the social doctrine of the Catholic Church contains a set of reflexive principles that work as guidelines for action providing criteria for both policy design and institution building. These are the *principle of association* (encouraging free association as a method to build up action capacities to carry out shared purposes); the *principle of the common good* (summarized in those conditions that allow all members of society to develop their integral being by means of social cooperation); the *principle of solidarity* (stating the interdependence and the reciprocity that link all members of society); the *principle of subsidiarity* (according to which society's superior authorities and units not only have to respect the authority and the competencies of inferior units, but they also have the positive duty to help them to carry out their function without curtailing their autonomy and capacity); the *principle of participation* (which states that persons must be active participants in all social tasks directed to the common good); and, finally, the principle of the *organic unity of social life* (conceiving of society as a system of interdependent and hierarchically integrated nested units built through participation and respecting the principle of subsidiarity) (Guerrero; 2009: 269-73).

It is not easy to assess the impact of Catholic social doctrine on the wider socioeconomic order and, more specifically, in the development of Spain's welfare state in the past century: a century marked by sharp political discontinuities that drastically affected the Church. The forty years of Francoism were the period in which Catholic ideology was most influential in policy-making circles, and particularly in social policy-making, for Catholicism was the common religious creed of all political families within the regime, most policy-makers were devout Catholics, and the political regime fashioned itself as a staunch supporter of Catholic values and doctrine. Thus, Francoism made ample use of two ideas of the Church's social

doctrine: the idea of the centrality of the family as society's basic cell, and the idea of society as an organic unit made of hierarchically integrated interdependent orders (corporatism). These ideas conferred both a familialist and a corporatist stamp to the welfare state built under Francoism. Thus, social policies were designed to protect workers *and their families*, assuming that families were responsible for the care of their dependent members. Furthermore the social protection system had a marked professional imprint even after the creation of the Social Security system in the late 1960s.

However, the authoritarian character of the Francoist regime limited severely the application of two major principles of the Catholic social doctrine: the principle of participation and the principle of subsidiarity. The severe restrictions posed to participation at all levels inflicted a deficit of *voice* in the processes of both institution building and institutional governance of the emerging welfare state, and promoted a bureaucratic ethos that was scarcely responsive to the citizenry. With regard to subsidiarity, the centralist nature of the Francoist state was at odds with the application of this principle; the high concentration of power in the central government, the absence of intermediate political and administrative structures, and the low fiscal capacity of the local governments tended to reinforce the power of superior units over inferior ones, and fostered the centralized unitary structures.

The principle of subsidiarity fared better in political democracy during which the Spanish citizens have witnessed a thorough political devolution, instituting seventeen regional governments endowed with ample legislative capacity. Unfortunately, this massive political decentralization failed to restructure the state along the lines of the subsidiarity principle. In fact, regional governments have shown an ongoing eagerness to expand their political competences and overstep the initiative of local governments often duplicating the administrative structure.

3.2. Societal values and the welfare state: familism cum equalitarism, and statism

The Spanish welfare system has developed in (and, hence, has been influenced by) a cultural context in which three broad interacting value orientations and behavioral dispositions (*habitus*) stand out. For clarity's sake, we shall call them *familism*, *equalitarism* and *statism*. However, as we argue in what follows, these terms have to be qualified by adding the appropriate modifiers in each case, for in Spain we find specific varieties of these general cultural patterns that may differ from those prevailing in other countries.

Familism

Here we use the term *familism* to refer to both the strength and the functionality of family bonds as welfare-generating resorts throughout the individual's life-course. Ever since Banfield (1967) coined the expression 'amoral familism' to explain the economic backwardness of Southern Italy, the term 'familism' has become loaded with pejorative sociological connotations. Thus, familism has tended to be seen not only as backward, but also as unhealthy and dysfunctional for a modern society, and in any case contrary to universalistic attitudes and institutions. Independently of how accurate was Banfield's amoral familism to portray family life in Southern Italy sixty years ago, we do not consider Spanish familism to be neither amoral, nor backward or pre-modern. The fact is, a fairly different

version of moral familism was the prevailing ethos in a large part of the Spanish rural landscape (for instance, among Castilian communities in the early 1960s: Pérez-Díaz 1991).

It also makes sense to draw a distinction between familism and familialism, the first referring to a cultural pattern, the second to a policy regime in which the family plays a central role as welfare producer and mediating structure in welfare provision (Esping-Andersen 1999). Though, in principle, familism and familialism may go together (as in Spain), the relationship between them is historically contingent.

The Spanish variant of familism stresses both the open and lasting character of family obligations and responsibilities, particularly the obligations of parents to their children, which tend to be extensive and do not end with children's emancipation. One can say that the relationship between contiguous generations in the Spanish family is organized by a *rule of sacrifice* that induces parents to strive for the welfare of their children, not only when they are dependent but also after they have left the parental home to form their own families. We use the term sacrifice not only to highlight the parental disposition to undergo privations for their children when the situation demands them, but also to stress the fact that, although some measure of reciprocity from children to their parents is expected, it is not a balanced one. Parents do not give to their children with the expectation of getting back a fair return at some moment in the future (a feature of traditional familism), but with the expectation that their children will do the same for their own children. In this sense, Spanish familism contains a future orientation and organizes the intergenerational relation within the family according to a principle of generalized exchange that pushes upwards a welfare spiral from one generation to the next. In each generation, it is a motive of pride to be able to give and to pass more (or no less) to the next generation than what one had received from the previous one.

Familism has many behavioral correlates and they are not limited to the vertical axis of the relations between parents and children; the horizontal axis of the relations between siblings is also a focus of solidarity and mutual help, though probably not so intense as the vertical one. One behavioral correlate of familism is the practice of young people to remain in the parental home until they create their own families (which, due to the rigidity of the Spanish labour market, usually means a long period after they have finished education). Another one is the habit of the new families to set residence close to the parental home (or the parents' movement to get closer to their children) to benefit from their help (and to help them when in need). Yet, another one is the significant financial backing that parents tend to provide to their children to help them buy their homes or to start their own business. Not to mention the active role that both parents and siblings play in attending family infants and in taking care of sick family members. Last but not least, families usually play a crucial role in helping navigate life crises, like buffering the impact of unemployment, or coping with accidents, divorce, health crisis, and death (Pérez-Díaz, Chuliá and Álvarez-Miranda 1998) .

Though the modernization of Spanish society in the second half of the twentieth century has impinged upon the family and has enlarged the repertoire of family forms (single mothers who bring up their children, second marriages that mix children of previous marriages, unmarried couples, etc.), the demographic weight of these new family forms in Spain is still much lower than in the Northern and Central European countries. While in Spain only 14% of young people aged between 16 and 29 live in unmarried couples, the rates for France (46%) and Germany (32%) are significantly higher (Jurado 2005: 66). The high acceptance

that religious marriage continues to enjoy among the youth and the still relative low divorce rate are indicators which show in the same direction.

Familism tends both to instill value on the family (and family bonds) as an institutional form and to reinforce its social functionality. However, the massive incorporation of women into the labor market during the last decades has weakened the capacity of the family to operate as a welfare-generating structure. When married women enter or remain in the labour market, the family's capacity to care directly for their dependent members suffers a drastic reduction that has to be compensated for with the engagement of additional familiar help (parents), and/or the contracting of private services in the market, and/or the access to public services. So far, the Spanish welfare state is mainly oriented to income redistribution *via* benefits and payments, and lags behind in the development of an infrastructure of personal social services to supplement the capacity of families to care for their dependent members (children before school age, older people that need assistance and disabled persons). Since access to public social services is means-tested, they tend to be crowded out by lower income strata. Families have found in the private market a temporary relief to their strains thanks to the recent swelling of immigration, but not all families can afford to pay these services at market prices.

In Spain as elsewhere, the younger generations of women have coped with the conflicting demands of work and family with a strategy of delaying both marriage and maternity. This adaptive behavior has prompted a fertility crisis of great magnitude, whose consequences in the long run are yet difficult to ascertain. However, and somehow paradoxically, this crisis of the family tends to reinforce familism as a means to cope with life strains and overcome problems.

Comparative social research shows that Spaniards tend to score low in social capital, and that they prefer to resort to informal social links rather than to forge formal affiliations to voluntary associations (Torcal, Morales y Pérez-Nieva 2005). The result is a weak associational sector and an inchoate civil society. It might well be the case that the underdevelopment of social capital is a side-effect of familism. However, the empirical evidence shows that Spaniards build voluntary associations when they need them (López Novo 2009). In addition, large voluntary organizations seem to be everywhere in decline, the reason being that in the “networked” society of late modernity the large voluntary organization has lost a good deal of its functionality (Skocpol 2003).

Equalitarianism

We use the term *equalitarianism* to refer more to a diffuse sensibility than to a creed. This equalitarianism is more a latent disposition than an explicit ideology, and more a rhetorical stance than an effective behavioral pattern; and it does not carry the implication that Spaniards would value equality of condition above merit as the criterion of distributive justice. The equalitarianism of Spaniards is rather an echo of the old peasant's idea of the “limited good”, which sees both wealth and life as zero sum games. It is as if the historical experience of centuries of economic stagnation and social inertia would have imprinted in the mentality of Spaniards a difficulty to envision systemic dynamism as a “positive-sum game” and to grasp the mechanics of productivity and growth dynamics. Thus, this equalitarianism could be seen as a symptom of low systemic trust: Spaniards put a lot of trust on their

families, but appear to be more distrustful of larger systems, particularly the economy or capitalism.

It bears reminding that the equalitarian penchant of Spaniards pushes them in a direction that differs markedly from that of familism: while the latter is future-oriented and willing to make sacrifices for the future, the former is presentist and unwilling to make such sacrifices. One legacy of sociological functionalism is the tendency to assume the culture of modern society as it were a coherent system of values and norms, but our interpretation here considers that cultural orientations may not be isomorphic across institutions and levels of social organization.

Behavioral implications of the Spaniards' equalitarian sensibility are rather ambiguous. Survey evidence shows that they tend to draw very low the threshold of acceptable inequality, and when asked about the acceptable proportion between the income of occupations placed both at the top and at the bottom of the hierarchy of occupational prestige, a large majority states that the former should not be more than the double of the latter, while in most developed countries the accepted proportion is three or four times higher. A large majority of Spaniards also thinks that Spain is a very unequal society and that adscriptive inequalities are still very strong in it. Furthermore, they tend to downplay individual achievement and merit in wealth formation (Noya 2004). However, this apparent delegitimization of inequalities does not breed orientations of class warfare between rich and poor, whose existence most Spaniards deny. It seems therefore that the spoken rejection of inequality goes hand with hand with the pragmatic acceptance of real inequalities.

Still, the equalitarianism of Spaniards creates a plausibility context that favors government intervention as a mechanism of redistribution. This affirmation may appear contradictory with the previous characterization of Spanish equalitarianism as a symptom of systemic distrust. In fact, government has a special feature that sets it apart from other large systems as the economy or civil society: in the public imaginary it appears as a structure more personalized, visible and comprehensible than the economic system, whose ups and downs appear rather mysterious even for economists. It is not so much that Spaniards have a big trust in government or the state, but that their low trust in the economy and civil society leads them to expect an active role of the state to insure redistribution. Equalitarianism, hence, provides an attitudinal background that favors the development of the welfare state as a mechanism to correct inequalities and to bring about wealth redistribution. This does not preclude people's ambivalence toward the welfare state, particularly with regard to the distribution of the fiscal burden needed to sustain social expenditure (González 2005; Noya 2004). But, in general, welfare state in Spain (both its institutions and policies) appears to enjoy an ample public support, and surveys do not show signs neither of a significant opposition to welfare spending nor of significant support of welfare cuts in particular policy areas, and even less in favor of welfare privatization (Pino 2005).

Bland statism

We understand statism as a cultural syndrome that combines two components: deference to government out of a sense of prudence and self-protection, and the paternalistic expectation that the state should take responsibility for the welfare of the citizenry in a context of low systemic trust. Since the term 'statism' usually carries the connotations of state *dirigisme* and

of a political tradition of strong state, perhaps it would be more convenient to speak of “deferential governmentalism” to refer to the variety of Spanish statism. However, we shall stick here to this term, though we qualify it with the modifier “bland”.

Spain certainly lacks a political tradition of strong state compared with its northern neighbor, though the Francoist regime tried to emulate French dirigisme in the sixties of the past century with some degree of success. In the twentieth century, the Spanish state followed the universal developmental trend of state expansion and growing interventionism in both the economy and society (Thomas and Meyer 1984; Boli 1987). The Francoist regime favored state interventionism in both the economy and society (though economic interventionism dwindled in the sixties), but it was not a strong totalitarian state, a clear indicator of its weakness being its low capacity of fiscal extraction. The new political democracy both expanded and modernized the state, enlarging public employment and gradually shortening the public expenditure gap with developed countries. Nevertheless, the intense territorial decentralization that the state has undergone under democracy has resulted in seventeen subnational governments striving to emulate the central government and often poorly coordinated with it, quite unable to control public spending and subject to clientelistic practices at the regional level.

Thus, the bland statism of Spaniards has two sides, one prudential and another paternalistic. Spaniards may be deferential to government in that they tend to personalize political power (to a point, perhaps a lasting legacy of forty years of political dictatorship) and historical experience has repeatedly taught them (in democracy as much as under dictatorship) that personal power can easily skip the rule of law and harm their interests. The paternalistic side is closely linked to feelings of low systemic trust and low personal efficacy (helplessness) in the public sphere. Spaniards are not prone to join in voluntary associations and to engage in civic life; they also have a measure of distrust of market competition. All those feelings would push them to look to government as the *locus* of responsibility for the general welfare beyond the realm of the family.

The bland statism of Spaniards is routinely gauged in public opinion surveys by asking respondents to express either their agreement or disagreement with statements like “the government is responsible for the wellbeing of all and everyone of its citizens, and has the obligation to help them to solve their problems”, which in 1985 and 1995 was backed by 60% of respondents, and in 2005 by 68%. Instead, the opposite statement “it is citizens who are really responsible for their wellbeing, and have the obligation to avail of their own means to solve their problems” only obtained the agreement of 15% of respondents in 1985, 20% in 1995, and 5,5% in 2005 (González 2005: 182; Pino 2005). At some point, a researcher of public opinion trends has referred to the links between statism, fear of market competition and feelings of low personal efficacy in this guise: “Today’s Spaniards have accentuated their pessimist vision about their possibilities to succeed or improve their lot in life by means of hard work, and they perceive more perversion in a competition that ‘brings out the worst in each person’. That is why a growing proportion of them turn to the state, demanding that it extends its protective mantle, assuming ‘more responsibilities for providing the necessary means of life for every one’, even ‘increasing the state property of enterprises’ if necessary” (Orizo 1996: 209).

One may argue that this variety of bland statism is, like equalitarianism, more vocal than behavioral, more a weak and vanishing cultural reflex than a solid conviction; and in fact, since the break up of the current economic crisis, both the confidence in government and in the political class has fallen precipitously.¹² But even if weak and vanishing, the statist penchant of Spaniards helps to explain some features of the current democratic regime, as the inordinate amount of power wielded by the head of government, the trend of the parties (*partitocracia*) to colonize and to crowd out the public sphere and the rather small civil society that tends to be subservient to the political class, and whose representatives rarely run the risk of openly defending their convictions in the public sphere if they clash with government policies (the Catholic Church being one of the few exceptions). Statism, even if bland, works as a cultural premise that adds to the legitimacy of the state and rests credibility to its critics.

The three *habitus* sketched above are interrelated in complex and non-obvious ways. We have already pointed to the elective affinities between equalitarianism and statism: since Spaniards tend to distrust both the capitalist economy and civil society, they may reduce social life to a two-options game: familism in the private sphere and bland statism in the public sphere.

In our view these three cultural orientations impinge on the welfare state, contributing to shape its development path. It may be wondered whether these three *habitus* have religious roots or are somehow related to Catholicism's strong influence in Spanish social and political history. Sure, in view of the prominent role that the Catholic Church has played in the history of Spain since its inception as a modern state, few aspects of the mentality of Spaniards have escaped its formative influence. Familism is the cultural pattern that appears to have the strongest affinity with Catholicism, for, as we have already mentioned before, it exalts the value of the family and defends its centrality in the architecture of society; however, familism is widely diffused in traditional societies and has flourished in different religious and civilizational contexts (suffice it to mention the strength of familism in Chinese society).

A degree of equalitarianism is also congruent with the catholic ethos, though we cannot blame religion for the low trust that Spaniards tend to put on large systems as the market or civil society. Even less we can attribute the bland statism of Spaniards to the influence of the Catholic Church, though Catholicism may have contributed to instill the paternalist idea of the state as *pater familias* that benevolently takes care of its subjects. In any case, since the arrival of democracy, and particularly in the last decade, the Catholic Church has been one of the very few civil society's actors that repeatedly raised its critical voice in the public sphere against government policies and its underlying conceptions of life, the family, education or historic memory.

3.3. *Work, family and social inclusion/exclusion*

The combined influence of state corporatism and national traditions of organizing public welfare contributes to explain the marked *ouvrierist* and professional bias of the welfare state that incipiently got shape during Francoism. When Social Security was institutionalized at the

¹² This opinion has been reinforced during the economic crisis between 2008 and 2010. See the results of the periodic public opinion polls administered by the CIS (www.cis.es).

end of the 1960s, the majority of employees were gathered in a general regime, while those workers lacking an employment contract (farmers, liberal professionals, the self-employed, etc.) were integrated in professional regimes that provided distinct coverage. This approach favoured institutional segmentation and discrimination based on occupation, both features being not alien to the Catholic culture and social doctrine.

From this initial bias the Spanish welfare state has evolved during the democratic period towards greater comprehensiveness and homogeneity, with the universalization of both schooling until 16 and health care (freely provided to the whole population, including illegal alien immigrants). But since most social benefits are linked to the previous working situation, inclusiveness depends on the relationship between the beneficiaries and the labour market. Hence, beneath a political discourse of social inclusion and universalism one may find differences in coverage based on working trajectories. The rise of unemployment in the context of deep economic crisis in 2008 has aggravated these differences, thus giving support to the argument of growing islands of social exclusion. This risk affects particularly long term unemployed people and low skilled workers who move in and out of employment, but are trapped in short term contracts (around one third of all workers) with low wages and no prospects of career or job consolidation. Young people without employment, workers employed in the informal sector and elderly lacking qualification are the most vulnerable groups to social exclusion, a risk which Spanish families have countered quite successfully by pooling resources and flexibly distributing them among their members.

4. The institutions of the Spanish welfare system

The Spanish welfare system leans on four pillars: (1) the income maintenance system (pensions and unemployment benefits), (2) education, (3) health care and (4) social services. The income maintenance system absorbs the greater part of social expenditure and follows a Bismarckian logic since the right of access depends on work subject to contributions. In contrast, education, health care as well as social services (the latter primarily covering the risk of being permanently dependent on the help of others to fulfill daily life tasks) follow a Beveridgean logic although with some nuances: access to education and health care is based on universal and citizenship principles, while access to social services has been traditionally filtered through means tests, even though in recent times it has moved towards universality with the approval of the Law on Dependency. A further remarkable difference affects territorial organization and management: whereas income maintenance benefits are provided centrally by Social Security, competences on education and health care have been transferred during the last 30 years to the autonomous (regional) communities. The latter, together with local municipalities, are also responsible for social services' provision. As the first decade of the 21st century comes to its end, the efforts by Spanish policy makers to maintain and even expand the welfare state clash with growing public deficits. The need to restore international confidence in the Spanish economy has forced the government to overcome its sluggishness to reform the pension system and try to curb the growing social costs.

4.1. Social security: pensions and unemployment benefits

During its more than 40 years of existence the Spanish Social Security has developed a wide income maintenance system primarily based on workers' contributions. According to OECD

data, in 2005 the Spanish state devoted 13.1% of its GDP to welfare cash benefits, most of them through the *Instituto Nacional de la Seguridad Social* (INSS). The INSS, a centrally governed institution depending nowadays on the Ministry of Labor and Immigration, is the most important welfare provider in terms of social outlays. In 2009 they amounted to more than €110 billion, ca. 10% of Spanish GDP.

The Spanish public pension system offers earnings-related pay-as-you-go-financed old age, permanent disability and survivors (widow[er]s, orphans and dependent kin) benefits. This pillar was designed in the 1960s under the Francoist dictatorial regime as a means to restructure and centralize pension provision, until then managed by state-corporatist associations on a funded basis. The 1978 democratic Constitution established the obligation of the state to maintain “a public Social Security system for all citizens guaranteeing adequate social assistance and benefits in situations of hardship, especially in case of unemployment”, further stating that “supplementary assistance and benefits shall be optional” (Art. 41). At the end of the 1980s, under the second majority government of the Spanish Socialist Workers’ Party, led by Felipe González, a private pension pillar was introduced through a law regulating privately funded and managed occupational and personal pensions aimed at voluntarily supplementing public pensions. To this double pension provision scheme (mandatory pay-as-you go pensions and voluntary funded pensions) the third Gonzalez’ government added at the beginning of the 1990s a public non-contributory tax-financed program in order to offer means-tested flat benefits for elderly and disabled people not fulfilling the eligibility conditions for a contributory public pension.

Concerning its organization, the contributory pension scheme comprises in 2010 the so-called general regime and five special regimes (self-employed, coal miners, fishermen, agricultural workers and domestic employees) offering altogether around eight and a half million pensions (more than five million of them retirement pensions). Civil servants working in municipalities, autonomous communities and specific institutions are integrated in the general regime, while the rest has been ascribed to different public mutualities.

Contributory pension benefits are in Spain, according to different sources, much more generous than in other countries: whereas the OECD average pension replacement rate is 59%, the Spanish pension replacement rate exceeds the 80%, the second highest (after Greece) among this group of countries (OECD 2009). Nonetheless, pensions are not very high in comparative terms (in 2009 the average monthly amount of old age pensions was € 831)¹³. Much lower are non-contributory pensions, with less than half a million beneficiaries that same year. As regards private pension funds, the majority of the 10,5 million pension plans’ contracts registered in 2009 had been signed by participants on their own initiative. Employment pension plans are scarcely developed, embracing slightly less than two million contracts. Compared with other European countries, assets accumulated by participants in private pension funds are low (roughly 85.000 million euros, ca. 8% of Spanish GDP). Private pension beneficiaries in 2009 amounted to 206.000, which means that less than 2,5% of all pensioners supplemented their public pension with a private one.¹⁴

¹³ Paid 14 times each year (12 ordinary and 2 extraordinary benefits in June and December).

¹⁴ Data extracted from the Association of Institutions of Collective Investment and Pension Funds (www.inverco.es).

Contributions based on salaries are not only the financing source of pensions, but also of unemployment benefits. Workers who have worked and contributed for at least 360 days have the right to such a benefit if they lose employment. Depending on the length of the contributory period, unemployment benefits can be received between four months and two years; and depending on the contribution base and the family situation of the worker they amount between ca. €500 and 1,400. After exhausting this type of unemployment benefit, unemployed workers under 45 having family responsibilities or over 45 have access to a noncontributory subsidy during a maximum period of 30 months. In 2010 more than three million people got unemployment benefits (60%) or subsidies (40%). With a 20% unemployment rate, those benefits and subsidies leave outside the income maintenance system around two million unemployed people.

4.2. Education, health care and other social services

Spain has experienced during the last 40 years an extraordinary expansion of formal education. Beginning in 1970 when the General Law on Education was approved, several pieces of legislation have reinforced the state's responsibility as a provider of primary, secondary and tertiary education. However, public expenditure on education represented in 2007 4,3% of GDP, nearly one percentage point lower than the OECD average; 87% of expenditure on educational institutions came from public sources, a figure below those of Scandinavian countries, France, Italy and Portugal (over 90%), but clearly exceeding those of Canada, the United Kingdom, Japan and the United States (between 69,5 and 66,1%) (OECD 2010).

Different laws on education approved during democracy (in particular, those of 1985, 1990 and 2007) have in fact consolidated the position of the Catholic Church in the educational sector through the system of *conciertos*, i.e. specific arrangements granting public subsidies to cover personal and administrative costs in exchange of observation of some organizational principles common to public schools. Thus the Spanish primary and secondary educational system, which since 1990 extend obligatory education until 16, includes public schools, private publicly subsidized schools (*escuelas concertadas*) and purely private schools. This tripartite system exists in each autonomous community with some differences in the weight of each provider (public or private).

As regards tertiary education, public universities prevail in number and coverage, even though the supply of private universities has been growing in the last years. The 51 public universities offered in 2006/2007 around 1.300.000 students' places while 142.000 students were registered in the 21 private universities. Among the latter some Catholic institutions stand out for having the longer tradition and attracting many of the best students. Growing percentages of participation in tertiary education have been one of the outstanding results of the educational expansion process, specially among women; 22% of each year of age entered university in 2005, while ten years before the corresponding percentage amounted to less than 5 (OECD 2010). Neither public nor private Spanish universities excel in European or world university rankings, but some private business schools (several of them connected with religious institutions) are internationally well known as providers of specialized postgraduate education.

Like education, health care in Spain is also completely decentralized. The National Health System (*Sistema Nacional de Salud*, SNS) created in 1986 includes the 17 regional health services under the management of the governments of the autonomous communities. The latter enjoy wide-ranging faculties to organize their health care services. Coverage is practically universal and even includes illegal immigrants.

Total health care expenditure in Spain amounts to 8.2% of GDP (0.8 points below OECD average). Public health care institutions absorb more than two thirds of this expenditure and they are deemed to be effective and reliable institutions with good qualified staff. Patients don't have to copay for health care treatments, but –except for from pensioners– they pay 40% of the medicaments prescribed by public doctors. Overcrowded and sometimes uncomfortable public health care services contribute to explain the strength of private health care. Around 28% of health care expenditure is privately financed: 22% out-of-pocket and 6% through private health insurance (OECD 2007: 89, 94-95).

However, the resort to private provision has been traditionally more pervasive in long term care. The 1978 Constitution declared social assistance as one of these competences which the autonomous communities could assume, although in this very same year it created a national institution of social services (*Instituto Nacional de Servicios Sociales*, INSERSO) to manage supplementary services to Social Security benefits for elderly and disabled people, as well as asyle seekers and refugees. In the 80s the autonomous communities incorporated in their constitutional laws (*estatutos*) different regulation on social services, while the 1985 Law on Municipalities recognized the obligation of cities with more than 20.000 residents to cover needs of social services. At the end of the 90s, as the process of social services transferences was completed, the IMSERSO (Instituto de Migraciones y Servicios Sociales) replaced the INSERSO, widening its competence to immigration and assuming responsibility for national social services plans and programs (especially those associated with active ageing).

Following a big national survey to quantify the number of dependent people in Spain, the IMSERSO led in 2006, under the first Socialist government of Rodríguez Zapatero, the creation of a national system to promote the independence of physically vulnerable people and offer assistance to individuals unable to satisfactorily care for themselves (*Sistema para la Autonomía y Atención a la Dependencia*, SAAD). After full implementation the SAAD should cover more than three and a half million people in Spain (around 8,5% of Spanish population) through specific services or subsidies. Like the SNS, the SAAD is to be financed through general revenues, although it also considers co-payment of services whose management and provision correspond to the autonomous communities.

As of 2010, the SND faces significant implementation difficulties due to problems not only related with the economic crisis and the subsequent saving needs of the Spanish state, but also with the identification and priority ordering of beneficiaries and the different performance of the administrative institutions that manage those services at the regional level. Families, especially mothers, daughters and sisters, continue to be the main caring agents when individuals of all ages get ill or disabled for long time. While health care accounted in 2006 for nearly 31.2% of total social benefits and old age for 41.3%, the family/children function only represented 5.7% (more than 10 percentage points lower than in 1970) (Eurostat 2009).

4.3. Current controversies and reform tendencies

In 2010 Spain's public deficit has exceeded more than seven percentage points the level established by the Maastricht criteria. Unemployment benefits and subsidies put financial stress on Social Security while the surplus of its contributory pension has showed a significant reduction. Under pressure of international governments fearing Spain's sovereign debt crisis, the government has approved in June 2010 by decree a labour market reform in order to reduce the advantages of indefinite work contracts. Pension reform will have to be negotiated in the last months of 2010. Rationalization of health care costs and a slow implementation pace of dependency coverage are further signs of the need to curb public social expenditure.

Families have traditionally played an important welfare function as a solidarity cell that buffered the effects of unemployment and other personal hardships. However, the efficacy of the family as a social buffer is limited, and the stress of both chronic unemployment and plural unemployment (when more than one family member is unemployed) may overwhelm its capacity for social solidarity.

The massive arrival of immigrants in the last decade has added new tensions to the welfare state, for if immigrants, on the one hand, increase the contributions that sustain the Social Security, on the other, they also enhance the demand of social benefits and services. Since immigrants take up the lower echelons of the occupational hierarchy, they tend to crowd out social services provided on a means tested basis; a situation that may nurture resentment in the local population that competes for access to these scant services. Furthermore, since immigrants tend to be employed in sectors –as construction and personal services– that are highly vulnerable to the economic cycle, they are very much exposed to the risk of unemployment, while usually lacking the help of a family network that may provide them with resources to cope with protracted unemployment.

Summing up, although the state has certainly increased its role in the welfare system during the last 50 years, the structural problems that suffers the Spanish labour market and the the seriousness of the economic crisis suggest that it will need the help of families, private providers and the third sector to face the most important problem facing all developed welfare systems: the ageing of the population and the subsequent increasing costs in pensions, health care and long-time care. Welfare pluralism is probably going to gain intensity in the next decades.

5. Conclusion: the central role of the Catholic Church and religion in the Spanish welfare system

Although family forms and operating procedures have experienced noteworthy changes since the democratic transition, and even though the democratic state has curbed the comparatively rather generous family benefits granted by the Francoist regime (by simply not revaluing them), families' contribution to the welfare of their members has been very strong and seems to be much more than a necessary remedy to cover welfare state gaps. Family links entail moral obligations resulting in feelings and actions that feed back those obligations. Individual

success and individual distress are often interpreted in terms of family success and family distress, and vice versa. Responsibility to the own family is sometimes so deeply felt that it probably crowds out commitment to other social organizations.¹⁵ Besides, one cannot disconnect these moral sentiments and perceptions of achievement and misfortune in life from religion. Their intensity in a time when religious faith and practices have lost importance shows the major and enduring influence which religion has on Spanish social culture.

Religion may play, and Christian religion usually plays, the role of a powerful reinforcer of the family—in the tradition of a family of parents who are supposed to care and be responsible for the general welfare of their children. Christian symbolism provides a privileged place for mothers as the main pillar of the Christian foyer as well as the key for the domestic order in all its dimensions: practical and emotional, earthy and spiritual.

The fact is that the importance of the family in the Spanish welfare system is so much marked and plays such a central role in it (as it does in other Euro-Mediterranean countries) that it deeply questions the conventional schema of corporative, liberal or social-democratic variants of the welfare state as provided by the literature of the 1980s and 1990s (Esping-Andersen 1999). It seems obvious that the family does not play, nor does it pretend to play, a role of functional equivalent to the state as a provider of welfare services—most of what the family does, the state is simply unable to do. The public realm does in fact provide few economic, institutional and symbolic incentives to foster the family's activities. Nevertheless, these activities are well and alive, even despite the increasing numbers of women entering the labour market.

The reinforcement of the family as a welfare agent is one of the significant effects of Catholic religion, the other two being the supply of a significant welfare infrastructure particularly active at a communitarian level, and the focus on poverty and social exclusion in the welfare agenda. These three effects summarize the ways in which the Catholic Church has been “welfare-productive” in Spain. Throughout the 20th century, it followed an intricate path first accommodating with the liberal state, then getting herself enmeshed into a Civil War as an active part on the winners' side, afterwards becoming a firm ally of an authoritarian regime, and finally, after a complex transitional stage, with the return of democracy in the late quarter of the century, muting its institutional status into that of a majoritarian religious confession within a non confessional state, and a pluralist and to a great extent secularized society. This historical trajectory shaped the mix of social activities performed by the Church, favoring its keeping a role in the sector of social services while expanding its role in the educational system. With the passing of time, Church welfare activities have been incorporated only to a point under the umbrella of the public welfare system, even though this institutional accommodation has been more complicated in the educational sector than in poor relief and social assistance. These different outcomes were, to a point, the consequence less of changes in the social doctrine of the Church than of historical contingencies that shaped her response to cope with them.

¹⁵ In 2003 36% of Spaniards declared to be members of any association. In Denmark and Sweden the corresponding figures were about 90%, and in Germany, United Kingdom and Belgium, around 70% (Méndez 2009).

In this paper we have tried to illustrate in which way and to which extent the Catholic Church and religion have shaped, and do shape today, the development of the entire welfare system in contemporary Spain. To be sure, “welfare system” and “welfare state” are not interchangeable concepts and our deliberate use of the former concept relies on several arguments. Thus, we are dealing with a plurality of agents among which the state’s prominence is a rather contingent phenomenon mostly circumscribed to the last five decades of Spanish history. True, the state plays a central role in welfare provision in many European countries today (still a small part of all world countries), but this evidence has to be considered in the light of the existence of indicators and measurement instruments which quantitatively assess the state performance.

Consequently much too emphasis on the state not only restricts the field of agency to it and its presumed partners, but also the time horizon to a relatively recent past, and the space to a rather small portion of the planet. In addition, overstressing the state tends to limit the scope of the concept of welfare and of welfare services to those the public administration (or rather the political society of politicians as well as of civil servants and associated experts and partners in the media) thinks it may provide in better conditions than other providers. Still, such focus on the state may distract attention from one particular (but crucial) dimension of traditional forms of welfare —that of aiming at reinforcing the sense of belonging in a moral community.

Most of the evolving welfare mixes we find nowadays in most countries are the result of traditions which have evolved in an *ad hoc* manner, as the result of multiple, independent or loosely coordinated efforts of all sorts of agents. And to a great extent they probably still evolve this way. Therefore, the rhetoric of state rationality notwithstanding, it is important to focus on the cultural background most agents (political actors, families, firms, churches and other associations) may have and eventually share with each other. The state, and in general the political actors, is certainly not the only, nor the more effective, source of persuasive moral arguments for the welfare system. In fact, the discourse it constructs to justify welfare provision usually echoes the supposed moral sentiments of the population, including (sometimes poorly worked out) religiously grounded arguments in the form of appeals to a sort of civic religion of social solidarity, full citizenship, patriotism or nationalism, with a reminder of well rooted feelings of solidarity between generations.

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