

THE EUROPEAN NETWORK FOR
SOCIAL POLICY ANALYSIS



UNIVERSITÀ DEGLI STUDI DI MILANO
DIPARTIMENTO DI
SCIENZE SOCIALI E POLITICHE



The Southern European «model» of welfare revisited

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The «discovery» of the model



1. A fragmented and internally polarised income maintenance system
2. The absence of a basic safety net
3. Universalistic health care systems
4. Forms of particularistic-clientelistic distribution of welfare benefits
5. *Generous replacement levels for pensions + high rates of home ownership*



Outcome: a double distortion

- **Functional** (risks): old age > other risks > lack of resources/poverty
- **Distributive** (social groups): insiders > (midsiders) > outsiders

Risks Countries	Contributory Pension 1992 (max %)	Unemployment Beneneft for young entrants 1992 (%)	Minimum income (%) 1992
EU12	75	25	22
Greece	107	0	0
Spain	97	0	0
Italy	87	0	0
Portugal	94	44	0

Source: Social Protection in Europe Report, 1993



Explanatory factors

Weak Fordism

Persistence of agriculture, territorial/sectoral diversities, labour market segmentation, informal economy → **dualism, and polarization of transfer benefits**

Strong familism

Persistence of the extended family as the cornerstone of society, catholic subsidiarity norms, women as caregivers → the **absence of a safety net**

Ideological Polarization

Christian/conservative parties vs **divided left**: → «workerist» approach for transfer schemes, universalist approach for health care

Low stateness

Vulnerability of welfare administrations to particularistic pressures; a legacy of organised patronage → **clientelistic practices and exchanges**



A substantive balance sheet: Recalibration, 1995-2025

- Gradual **smoothing** of the double distortion
- Rebalancing towards **services**, including social investment (Hemereick)
- From bad pupils to «**flying**» **P.I.G.S** (Moreno)

Countries	Old age pension net replacement rate 2004-2014 (pct points)	Unemployment benefit net replacement rate 2004-2014 (pct points)		Minimum income benefit as % of average low wage earner in 2019	Family spending within total social spending 2012-2022	Female employment change 2010-2024	
		month 2	month 13			10	24
Greece	- 15	+13	+ 3	22	+ 60%	47	60
Spain	- 4	+ 2	+ 1	38	+ 7%	57	66
Italy	- 6	+19	+59	62	+ 31%	53	57
Portugal	-10	+ 4	+ 6	24	+ 8%	62	69

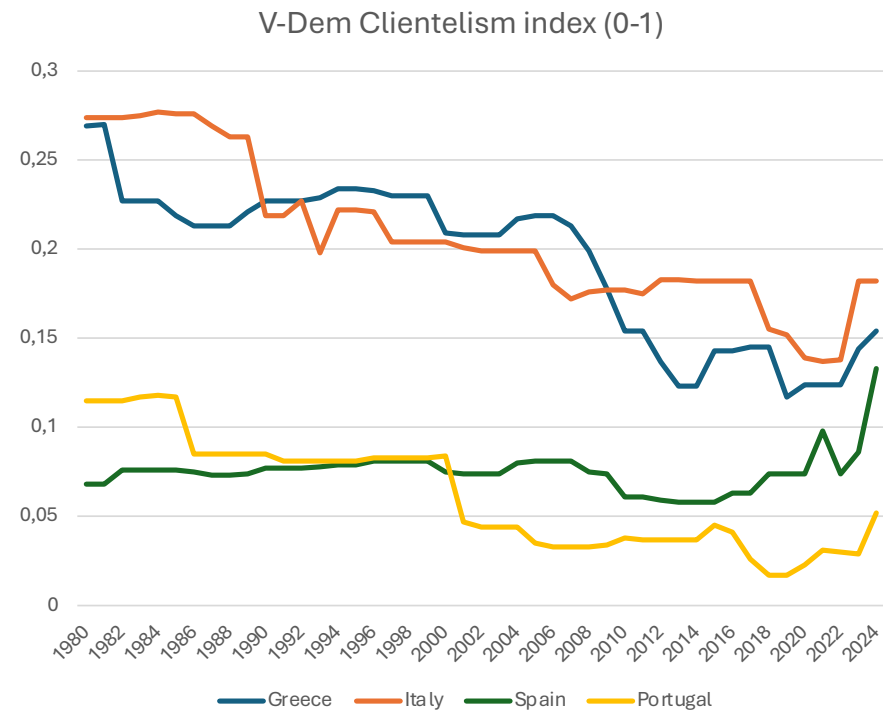
Sources: for pensions: CESifo, DICE Report; for unemployment: Eurostat; For minimum income: Social Protection Committee; family benefits and female employment: Eurostat



Containment of clientelism

Country	Score
UK	0.1
DA	0.2
PT	0.3
ES	0.4
DE	0.4
IT	0.5
GR	0.6
<i>Argentina</i>	<i>0.7</i>
<i>Paraguay</i>	<i>1.0</i>

1. General improvement
2. Internal variation
3. Signs of reversal?



Party Patronage Index, 2012

V-Dem Clientelism index, 1980-2024



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Explanatory factors

- **Economic change:**

Decline of agriculture, post-industrialism and service-based economy, new risks, etc.

- **Socio-cultural change:**

women's emancipation, higher female employment, weakening of traditional familialism, decline of religiosity, etc.

- **Structural adjustment and fiscal constraints**

Fiscal stability and competitiveness

- **Political change:**

De-polarization and bi-polarization, left de-radicalization (“postindustrial inclusive egalitarianism”), greater importance of programmatic competition, new logic of «subtractive» policies, etc.

Functional and political Pressures (internal and external)

+

New patterns of partisan competition (electoral incentives)

→ **Recalibration**



A theoretical balance sheet

Critique

- A **marginal** and **partly misleading** diversion with respect to the three world
- Brings ammunition to **anti-welfare discourse**

Response

- A more accurate descriptive and explanatory characterization
- Addition of **health care** as an important domain of decommodification/destratification
- Extension of focus from the «welfare» of the state to the «**stateness**» of **welfare**



«Model»: a misnomer?

- **Qualitative generalisation** from 4 historical cases (an empirical or extracted «type»), without normative undertones
- **Historical/developmental macro-comparison** (Flora, 1986) of a **family** of nations (Castles, 1993), sharing a number of «resemblances»

Similarities between members of a group, like a family, that overlap and interlace without a single, defining characteristic present in every member

Intra-type
comparisons

Comparison with other types

Application to novel cases
(Latin America, other Mediterranean
North East Asia)



An exhausted agenda?

- **Factual convergence** towards a common (hybrid) set of resemblances (European Pillar and Social Convergence Framework)
- **Similar/common new challenges** are increasingly **filtered by the EU**
- **Old typologies** and their analytical criteria are **losing traction**
- Need for **analytical renewal**

Southern European Model: **research agenda**

- **Retrospective accounts** of recalibration
- **New RQs**: To what extent **developmental legacies** offer not only persisting constraints but also **novel opportunities**
- Search for **counter-intuitive strengths** of these legacies: e.g., the potential virtues of **familialism lite** or **stateness lite** for post-industrial inclusive solidarities



THANK YOU!

Slides and accompanying note downloadable
from: <https://www.secondowelfare.it/>

