

Abstract

This thesis analyses the welfare arrangements of the Portuguese elderly from an historical and a sociological perspective. Two goals form the focus of the thesis.

First, it attempts to enrich the discussion on familialism as a model of welfare provision in old age in Portugal. Starting with the historical analysis of the process of consolidation of a model of welfare provision that is based on a set of assumptions about the existence of intergenerational ties and kin solidarity throughout the life course, the thesis moves on to the sociological analysis of family dynamics and normative propositions related to welfare arrangements in old age. The broad question underlying the analysis is to know how resilient and operative is familialism as a logic of welfare provision for the Portuguese elderly. The thesis shows that the resilience of familialism in the lives of the elderly is related to a complex set of social, economic and normative intricacies that still provide for a support network in old age but that show signs of being under accelerated erosion.

Second, the thesis aims to make a contribution to the analysis of welfare states and social policies in familialist countries by demonstrating the explanatory power of family arrangements for understanding welfare arrangements in old age. This involves introducing in the analysis of welfare arrangements a focus on intergenerational and kin relationships, demonstrating how the familialist model is intertwined with a complex network of exchanges of support that goes beyond the needs of the elderly and that is in fact structured around the functional roles of each member of the household and/or family for the welfare of the whole.

The thesis draws on review of literature and secondary data analysis. The data used came from three main sources: the European Community Household Panel (1998), the Portuguese Family Budget Survey (2000) and the Eurobarometer Survey Series (1992, 1995 and 1998-99). The analysis of data has privileged a descriptive approach, using some multivariate analysis to make meaningful synthesis. It combines cross-national comparative analysis with a case-study focus. The goal of the empirical analysis was to come up with a holistic synthesis of welfare arrangements of the Portuguese elderly linking them to three main dimensions: institutional, familial and normative.