



# **WP10 – Report on Social economy & household resilience**

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## **Portuguese National Report**

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November 2016

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## Theoretical background

Current attempts to define the social economy are associated with the Charter of principles of social economy CEP-CMAF from 2002<sup>1</sup>. It says that: social economy organizations are social and economic entities operating in all sectors. They are distinguished mainly by their objectives and characteristic form of entrepreneurship. The social economy includes organizations such as cooperatives, mutual societies, associations and foundations. These companies are particularly active in certain areas, such as social protection, social services, health care, banking, insurance, agricultural production, consumer issues, associative work, crafts, housing, supplies, neighbourhood services, education and training, and the area of sport culture and recreation. In the context of the fight against social exclusion, the social economy is understood as initiatives in the field of labour market policy, in particular the socio-professional integration of socially excluded groups, opposing the unjustified polarization of income societies.

Social and economic criteria in the “ideal model” of social enterprise (by EMES-European (International) Research Network):

The economic criteria include: conducting permanent activity with a direct aim at producing goods and services; high level of autonomy – social enterprise emerges as a voluntary initiative of a group of people who manage it, they also decide whether it should continue or terminate its operation, although in terms of finance it may to some extent depend on public subsidies; considerate level of economic risk – the functioning of social enterprise depends on the efforts of its members and staff and their ability to acquire necessary resources; ability to use in its activity both paid and social labour.

The social criteria include: the operation of social enterprise must be focused on supporting and development of local community and promoting the sense of social responsibility on a local level and the production of goods and services should find its market niche; social enterprise comes into being as a result of collective activity of people belonging to a given community, sharing the same problems or goals; democratic management of social enterprise is not subordinated to owning capital shares; social enterprise may be both organisations which cannot redistribute their profits and entities like cooperatives which may distribute their profits only to a limited extent.

Social economy is an important factor of local development – it creates jobs, extends the range of services, allows to better fulfil human needs. It may also create a complex system of local economy relations (community economy), include non-government organisations in the areas of activity of local government and affect the creation of local and neighbourly forms of economic cooperation and mutual support. The aim of so defined social economy is creating inclusive local labour market, especially dedicated to people who are particularly endangered with social marginalisation. For some of them it is the only form of employment, and for others

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<sup>1</sup> Cooperatives, mutual societies, associations and foundations (CMAF ) deemed it essential to establish a permanent dialogue on European policies that are of common interest. In November 2000, they set up the European Standing Conference of Cooperatives, Mutual societies, Associations and Foundations (CEP -CMAF). In January 2008, the CEP -CMAF changed its name into Social Economy Europe <http://www.socialeconomy.eu.org>

– a form of transitory economic activity on their way to the open labour market. In this context social economy activity should be understood as community organizing process. Local community organizing is recognized as: action, usually professional, which aims to mobilize and support members of the community taking action together to improve their own situation and social development. (Ross 1967; Cohen 1978; Rothman, Tropman 1987; Wódz 1998; Wódz 2013;)

In situation when we don't have in our communities example of social economy entity or activity which could be understood as similar to social economy I would suggest to describe in this WP other kind of innovative activity based on community work (top-down or bottom up/grassroots activities).

Planning actions in the scope of local community organizing on the basis of the principle of governance and using consensual solutions causes the creation and institutionalisation of concrete socio-institutional mechanisms, specific algorithms of action, in the scope of counteracting and solving social problems. Such mechanisms may become active in the future independently when definite conditions occur, which leads to the community getting independent in their further functioning.

In this context local community organizing, or wider, practice of local governance is a process in which one of the main goals is to activate social capital (Bourdieu 1986, Putnam 1995, Coleman 1998) In the framework of a group or community available are the resources which are available only to their members exclusively on the basis of the network of their mutual connections. Within the framework of this type of connections a number of relations and socially shared emotions which facilitate mutual cooperation to members of the network. Trust is considered one of them. Owing to trust created through mutual relations and bonds, social capital lowers transactional costs and thus facilitates the performance of certain tasks in a simple and comfortable way. (Putnam 1995).

Communities with strong bonding capital are characterised by great intensity of neighbourly relations, a socially shared sense of strong bonds and trust, mutually recognised norms and strong informal social control, but at the same time there can occur closing to people outside the community / outside the network, strong need of acceptance within the network, which may limit individual freedom and innovativeness. Communities with strong bridging capital are communities in which there function strong well organised groups and associations acting largely on the basis of willingness to pursue a common goal rather than being bound by a sense of strong emotional bonds or a need of affiliation, but also well connected with other networks whether outside a given community or referring to other dimensions of its functioning, e.g. administrative or economic. (Putnam 2001). Opportunities for community development as well as development of social economy entities are higher when both of these forms of capital are high. Bridging capital allows communities/groups with strong ties, shared norms and trust extend to resources contained beyond its borders which creates the conditions for cooperation for solving problems and achieving the objectives of the Community. (Granovetter 1973; Woolcock, Narayan 2000).

## 1. Theoretical and legal framework of social economy and social entrepreneurs in partner countries

Portugal has an official definition of "social economy" according to which, "... as underlined by the European Parliament Resolution [2008/2250 (INI)] of 19 February 2009," by combining profitability and solidarity, it plays a crucial role for the European economy, creating high-quality jobs, strengthening social, economic and regional cohesion, generating social capital, promoting active citizenship, solidarity and a type of economy with democratic values that puts people first, in addition to Support sustainable development and social, environmental and technological innovation '."

This definition can be found on the official website of the "National Council for the Social Economy" and allows us to underline two aspects of the social economy legal framework: (i) the great importance of European references; And (ii) the multifunctionality attributed to the social economy as a relevant element of the economic system, the employment system, social, economic and regional cohesion, the valorisation of social capital and the promotion of citizenship, solidarity, environmental innovation and Sustainable development.

The text of the presentation of the mentioned site continues: "Months before the discussion in the European Parliament, the Economic and Social Committee had commissioned CIRIEC - International Research and Information Center on Public, Social and Cooperative Economics - a report on the Social Economy In the European Union. In this study, CIRIEC proposed the following definition:

Social economy means the set of democratically organized free-standing and decision-making enterprises, with their own legal personality, created to meet the needs of their members in the market, producing goods and services, and in which Exercise surpluses and decision making are not tied to the individual capital of the members, who will each have one vote. This includes Cooperatives, Mutualities, Private Institutions of Social Solidarity, Misericórdias, Local and Regional Development Associations and Foundations, as well as social enterprises and voluntary non-profit entities that produce non-market services for families, and whose eventual Surpluses can not be appropriated by the economic agents who created, control or finance them.

Given the multidimensional nature of the functions, as well as the sometimes problematic distinction between the market and the state, the definition focuses on a specific field of agents with certain legal status. It is a more descriptive and substantive definition than concetual.

The issue of borders has always been controversial, as evidenced by the attempt to delimit "civil society" produced by the Economic and Social Council in the late 1990s. What emerged from this attempt are three central ideas, which still prevail: (1) Between the social economy, the market and the state the frontiers are not always clear. There are many activities with hybrid characteristics and even sectors in which in the same branch (eg, family support equipment and social facilities in general) operate public agents, market enterprises and social

economy entities. These, in addition are able to operate in a social logic and simultaneously in a market logic; (2) only part of the "organized civil society" is legally formalized and carries on economic activities (other entities such as the social partners do not); And 3) these activities are subsidiary to the market, but also to the state.

This latter aspect has been the subject of controversy in the past and still is, although in a less visible way. On the one hand, some political and social actors refer to the greater flexibility and efficiency of the third sector to promote some public policies that, according to typical European standards, are the responsibility of the state administration. This is the case of social facilities to support families and vulnerable groups (equipment for the elderly, for children and young people, for victims of domestic violence, for refugees, for people with disabilities, etc.). Another example is the minimum income policies, in which social economy agents work in partnership with social security, dividing tasks with the public administration. It is argued from this perspective that Portugal, having begun the process of developing the Welfare State when many of these institutions were already on the ground (by the action of the Catholic Church or citizen movements generated after the Revolution of 25 April), could not waste these resources and create other redundant services. From this perspective, the partnership between the State and civil society is beneficial. The State funds the activities or at least contributes to the costs of lower income groups, and civil society organizations promote equipment and services in a more flexible way. This will be, according to this thesis, a specificity of the Portuguese welfare model. We will return to this topic later.

Another position, however, prevailing mainly in certain academic circles, argues that this "transfer" of state responsibility to civil society is only to embarrass the costs of policy measures that are the responsibility of the State, through the exploitation of social economy workers, generally paid below their peers who are in the public sector doing equal or equivalent work.

Back to the issue of the functions mentioned above, we should add the fact that social economy institutions – in particular those operating in the health services and charities in which the majority of the leading members are volunteers – are the main field for volunteer participation in social action, thereby increasing the numbers of citizens involved in social solidarity activities, which is very low in Portuguese society, as we will see below in chapter 3. Nevertheless, it should be noted the lack of effectiveness of this type of solidarity when compared with formal public policies, and, consequently, of the complementary way they should be seen against the latter (Hespanha, 2012).

One final note on the subject of the function of social economy entities is to underline that, frequently, they are the means through which poor populations can be heard in their claims, either because of the development of community development projects that promote empowerment, or because these organizations act as mediators between the poor and the policy-makers.

In view of the difficulties in defining the social economy from the establishment of abstract frontiers in relation to the State - due to the provision of public services - and to the market - due to the existence of surpluses distributed among members of the entities and to the mixed nature of most of the Institutions - the more recent definitions have chosen, as we have seen,

by a substantive approach, explicitly designating the entities that comprise this sector of the economy, rather than delimiting it by the type of activities and functions developed. However, the basic characteristics of the agents, which are officially defined as those which "encompassing the subsectors of the market and the non-market, social economy organizations have the following common characteristics:

- They are not public;
- Are formally organized;
- Have autonomy of decision;
- Membership in them is free;
- The possible distribution of surpluses among affiliates / users is not made in proportion to the capital or contributions of members, but in terms of their activity or participation in the organization;
- The economic activity aims to satisfy the needs of its members and
- Internal functioning is governed by democratic principles. "

In relation to previous definitions, in particular those associated with the creation of a set of employment measures within the framework of the former European Employment Strategy, these attributes seem to place less emphasis on complementary economic functions in relation to the market. In fact, the social economy aims not only to satisfy the needs of its affiliates but also to produce goods and provide services whose production is not ensured by market agents, despite their economic and social value. This is the case, for example, of services provided to disadvantaged groups and people in a situation of poverty or social exclusion, and therefore without economic affluence. For the most part, charitable activities, such as food banks, are promoted by social economy entities, since public institutions are not organized for this purpose, whereas, being non-marketable, they are outside the sphere of action of companies.

On the other hand, with regard to the job creation function, during the period covered by the European Employment Strategy, there was a strong emphasis, when defining social economy, put on a twofold aspect of qualified employment generated by the economic activities carried out, but also the creation of jobs for people with no employability in the open labor market. Some of the policy measures then defined, such as "social enterprises" or training for disadvantaged groups, precisely served to develop the skills necessary for the autonomous insertion of these groups into the regular employment market. Although not present in the current official definition, this goes on being an important role of social economy in Portugal. For many people, it provides the only available opportunity to participate in the world of labor and to work in a meaningful way.

In the meanwhile, the relative "impoverishment" of the officially defined attributes (not mentioning in the definition, not in the reality, the task of filling the gaps generated by normal enterprises in areas that are not profitable, and the double face of job creation), is compatible with the institutional rise of the social economy, which was linked at the beginning of the 21st century to the public employment services, and became dependent directly on the government, as can be seen from the composition of the National Council for Social Economy, which includes:

- a) The Prime Minister, who presides, being able to delegate to the member of the Government responsible for the area of social economy;
- b) The member of the Government responsible for the area of social economy;
- c) A representative of the Government of the Autonomous Region of the Azores;
- d) A representative of the Government of the Autonomous Region of Madeira;
- e) A representative of the National Association of Portuguese Municipalities;
- f) A representative of the National Association of Parishes;
- g) A representative of the Portuguese Association for Local Development - ANIMAR;
- h) A representative of the National Confederation of Agricultural Cooperatives and Agricultural Credit of Portugal, C. C. R. - CONFAGRI;
- i) A representative of the Portuguese Cooperative Confederation, C, C. R. L. – CONFECOOP;
- j) A representative of the National Confederation of Solidarity Institutions (CNIS);
- k) A representative of the Portuguese Center of Foundations;
- l) A representative of the Union of Portuguese Misericórdias - UMP;
- m) A representative of the Union of Portuguese Mutualities - UMP;
- n) A representative of the Portuguese Confederation of Collectivities of Culture, Recreation and Sport (CPCCRD);
- o) Five persons of recognized merit and experience in the social economy sector, to be indicated by the member of the Government responsible for the area of social economy;
- p) The president of the Cooperativa António Sérgio for the Social Economy, who has no right to vote.

The main barriers for the establishment of social economy activities are related to (i) strict rules that imply a rather complicated formal process of constitution of new social economy organizations; (ii) the existence of very exigent institutional assets and certifications required to allow an organization to get the status of “social economy entity”; and (iii) the existence of informal barriers put in front of entrepreneurs that are not related to influent institutions.

As said before, the social economy entities recover a diversified set of different kinds of organizations and some of them, namely some Foundations, are rather powerful and influential in Portuguese policymaking. But the Private Social Solidarity Institutions (IPSS), associations that include the “Misericórdias” (charity institutions created from the 15th Century onwards in the sphere of the Catholic Church) are actually the ones that are more present in the Portuguese social tissue.



Private Social Solidarity Institutions (IPSS) play an important role in the Portuguese welfare system. There are more than 4,000 IPSS in Portugal, most of which emerged from groups and bodies connected, in a more or less organic way, to the Catholic Church. In 2008 they were responsible for 1.7% of the Gross Value Added, 2.1% of wages and 2.4% of consumption in the Portuguese economy (Sousa, 2012). They represent about 5% of total employments in Portugal. Federally structured at the regional and national level and forming part of the Social and Economic Council, they are important partners with the state in matters of social action.

Indeed, one of the peculiarities of the Portuguese welfare system is that it is historically designed to promote services and support facilities for disadvantaged households and groups through these social economy institutions and not by the state, who finances them. This situation is not the result of the social protection privatisation logic seen in many other countries after 1990, but rather of the decision to establish a partnership between the state and civil society organisations – which have a powerful presence on the ground – as the most effective means of extending a minimally-efficient network of services and support throughout the country.

In this model, it is these organisations, the IPSS, which are responsible for developing social support networks. However, the state is responsible for funding the social component of the overall cost: that is to say, the services offered to vulnerable and poor groups, households and individuals. They provide services to people with different financial resources, with those with higher income paying for all or a proportion of the services they receive, while those with fewer means are supported via state per capita reimbursements calculated according to a table agreed between the government and the IPSS federal structures. The State also finances the construction and equipment of the social facilities.

These institutions provide such social responses as: crèches and nursery schools (in this case sharing provision with public schools); day and evening centres for the elderly; care homes; home care and integrated support services for the elderly; rehabilitation centres for the disabled; supported employment services and occupational activities; training centres and employment support for vulnerable and excluded people; centres for the prevention of drug addiction and the treatment and rehabilitation of addicts; support centres for ex-offenders; community development centres; long-term care units and refuges for women and children who are victims of domestic violence; social enterprises.

Some IPSS's are coming under pressure to re-evaluate the services they provide as a result of the ageing population, by reducing the amount of funds aimed towards children and the young while increasing those dedicated to the elderly and dependent persons – and this is creating some tension within the system. Nevertheless, the main source of tension are the impacts of the crisis. While state transfers to the IPSS is one of the few items ring-fenced in all austerity budgets, other dynamics have emerged that are capable of creating unknown difficulties.

These dynamics are largely concerned with the “loss” of people supported by the services as a result of the decline in household incomes – a situation that has clearly emerged through the research carried out as part of the RESCuE project. Whenever households are obliged to make a contribution towards services – and these contributions are in certain cases paid even by people on very low incomes – we find that many children are removed from the pre-school

and nursery schools that are important for their early-years education. Similarly, many households that have lost work and income have taken their elderly relatives out of care homes and other facilities in order to use their pensions – however small they may be – to supplement their household income. This generally represents a huge loss in the quality of life of these elderly pensioners given that the households are often unprepared and ill-equipped to provide them with the care they need.

The IPSS's were also the main support service for one of the most symbolic social measures introduced by the government during the "austerity policies" imposed by the European institutions: the so-called "social kitchens". These kitchens served free or heavily subsidised meals to individuals or households that have been flagged-up by Social Network partners as being in economically vulnerable. Those responsible within the IPSS who were interviewed by the RESCuE project were highly critical of this measure, claiming it to be a mere palliative, and also pointing out that those people that kitchens were supposed to serve often feel ashamed and avoid using this charity policy. They also complained that they enabled the state and the wider community to escape responsibility for their obligation of solidarity.

The IPSS network covers both urban and rural areas. The ageing of the population and desertification of the country's rural interior and the concentration of immigrant populations in urban areas has resulted in a different emphasis by the services offered in each of these areas. Moreover, in the rural interior, which covers the largest part of the country's territory, with some rare exceptions the IPSS and municipalities tend to be the main employers, providing public services such as education, justice, security and health. They also provide social facilities for the elderly and, frequently, promote community-based local development projects.

In urban areas social economy agents are also focused in promoting facilities addressed at older people, but the social facilities addressed to children and youth area also important. The same can be said about centres for protection of abused children and women, victims of violence, rehabilitation centres, delivering minimum income services and development of anti-poverty projects, most of them located in neighbourhoods where migrants live.

## 2. Practice of social economy idea on local level.

In Continental Portugal there are no separate political regions. At the local scale, there are two levels of administration with their own power: (1) the municipal councils and (2) the parish councils. The Municipal Councils govern territorial units (municipalities) that range in size from 3,000 to 500,000 inhabitants, below which are the Parish Councils, responsible for territorial subunits (parishes) within each municipality. Municipalities provide land and other resources for the construction of schools, hospitals, health centres and other social facilities. Parish Councils have no social policy responsibilities other than those delegated to them by the Municipal Councils.

One area where municipalities have been effective in the field of social action is in the implementation of the “Social Network” – introduced by António Guterres’ Socialist Party government in the second half of the nineties –, as a way to establish improved connections and coordination between all actors operating in the field of social action and the struggle against poverty within each municipality. Thus, they work as a forum for identifying and monitoring social problems and for planning interventions, avoiding overlapping of actions and fostering collaboration between participating institutions. Social Networks were also given competences regarding the approval of applications for State and European funds. This type of network became the standard form of institutional organization at the local level to this day.

The municipal council is responsible for coordinating the Social Network, which incorporates (i) decentralised state services in the areas of social protection and social action, child protection, education and health; (ii) non-governmental organisations involved in managing social facilities and promoting anti-poverty and social development projects; (iii) the parish councils. This network is based on the principle of subsidiary, through which existing problems are solved locally. Higher level action is only required when local resources prove to be insufficient.

Each municipality defines a Social Development Plan, which is based on a frequently updated Social Diagnosis. These documents are produced by each social network and guide the activities of all agents – both public and private. The larger municipalities also have Parish Social Commissions – like in the case of Lugarão.

Participation on social Network has in general greatly increased the ability of local state services – such as Social Security, Job Centers or Health centers – to identify and monitor situations of poverty. They have also been key in improving the efficacy and efficiency in the interventions of third sector institutions and allowed for the creation of partnerships between the latter. However, differences in the characteristics of territories, as well dependence on the initiative and ability levels demonstrated by the municipalities, gave rise to considerable asymmetries within the country.

Thus, the main objectives for social intervention at the local level are defined in the context of the Social Network. This establishes a set of priorities, objectives and actions to be developed in articulation by the agents in the field. For its part, each entity integrates these objectives and actions into its mission and planning.

Analyzing the Plan of Social and Health Development of Lugarão for 2015/2017, we find the following priorities and associated general objectives:

Axis I: Promotion of Equal Opportunities and Active Citizenship:

- Promote specialized care and support to victims of violence, also qualifying social care through the involvement of local partners;
- Contribute to the prevention of the phenomenon of violence in the city of Lugarão, through the development of activities with children and young people, other key actors in the educational process and community in general;
- Promote debate between partners, contributing to integrated knowledge of violence, focusing on the various groups of victims and perpetrators, various forms of violence and their consequences;
- To promote the articulation between the key partners in the accompaniment to aggressors of violence;
- To structure and systematize the problems of the resident immigrant population in Lugarão, defining actions to be developed in partnership that empower the social, professional and cultural insertion of this group;
- Promotion of activities that allow the inclusion of vulnerable groups of the population.

Axis II: Active Aging:

- Provide conditions for the participation of the senior population in the decision-making processes, through the knowledge/information about the services and the existing responses and to stimulate the development of volunteering and the promotion of activities that foster the intergenerational relationship;
- To foster the diversification of activities, occupation of leisure time and activities complementary to social responses, which contribute to the improvement of the quality of life of the senior population;
- Improve intervention in the area of senior health promotion and prevention through the creation and diversification of supportive responses;
- Improve the living conditions of the seniors through the formation of teams, streamlining projects/activities that contribute to seniors staying in their own homes and restructuring some of the existing responses and services.

Axis III: Promotion of Quality of Life:

- To promote projects and activities in the community that promote quality of life and health, in the areas of sports, nutrition and health prevention.

Analyzing Gótica's Social Development Plan for 2014/2017, we find the following priorities and associated general objectives:

Axis I: Promotion of Children and Youth:

- By the end of 2017, create preventive/mental health advocacy responses;
- By the end of 2017, promote the autonomy of life of young people, contemplating gender equality;

- By the end of 2017, reduce dropout by 10% and absenteeism;
- By the end of 2017, promote parenting skills (positive parenting) and sensitize parents/caregivers to identified danger situations;
- By the end of 2017, promote the exercise of positive parenting among the population;
- By the end of 2017, increase responses to children and youth.

Axis II: Promotion of Education:

- By the end of 2017, reduce by 10% the Rate of School Dropout and School Improvement;
- By the end of 2017, promote adult literacy and skills upgrading.

Axis III: Promotion of Employment and Training:

- By the end of 2017, increase the level of knowledge about the county's need for qualifications and vocational training;
- By the end of 2017, foster communication between all county's training entities of the to give easy access to all interested citizens;
- By the end of 2017, promote training for citizens with low levels of qualification;
- By the end of 2017, sensitize the training entities to the promotion of tailored and decentralized training;
- By the end of 2017, encourage organizations to build projects in the area of employment according to the needs and funding available;
- By the end of March 2015, inform public and private partners of the difficulties regarding public transport.

Axis IV: Promotion and Protection of the Elderly:

- By the end of 2017, create responses to promote the rights and protection of the elderly;
- By the end of 2017, reduce geographic and social isolation and promote neighborhood networks in the county;
- By the end of 2017, promote flexible and adequate social responses to the profile and needs of the elderly;
- By the end of 2017, to minimize the situation of economic deprivation of the county's elderly;
- By the end of 2017, increase the level of literacy to 50 elderly of the county;
- By the end of 2017, increase the number of "assisted residences" answers in the municipality of Gótica;
- By the end of 2017, create responses at the level of night support "Night Center";
- By the end of 2017, create support responses to vulnerable families with disabled/dependent adult/dependent people.

Axis V: Promotion and Protection of Homeless People:

- By the end of 2017, to diagnose and elaborate a plan of intervention with the homeless population of the county of Gótica;

- By the end of 2017, identify and contact with the homeless population of the urban parishes of the City of Gótica and Vale de Gótica;
- By the end of 2017, to have a temporary shelter for the homeless in operation.

Axis VI: Promotion of Volunteering:

- By the end of 2017, to make concerted/coordinated volunteering in the county;
- By the end of 2017, reactivate the local volunteer program of the Municipality;
- By the end of 2017, promote training of volunteers.

Axis VII: Prevention of Addiction and Insertion of Drug Addicts:

- Until April 2016, intervene with children/adolescents/young people living in troubled neighborhoods;
- Until April 2016, intervene with the families of the children/adolescents/young people of the urban parishes;
- By the end of 2017, increase the skills of social workers who intervene with families;
- By the end of 2017, sensitize the community at large to the harmful effects of psychoactive substance use;
- By the end of 2017, create partnerships with the business community to promote the social and professional reintegration of people with problems of psychoactive substances;
- By the end of 2017, develop the personal, social and work skills of individuals with problems of psychoactive substance use.

Axis VIII: Insertion of Immigrants and Promotion of Interculturality:

- By the end of 2017, promote projects/information actions on the rights and duties of immigrants;
- By 2017, promote initiatives for the inclusion and promotion of interculturality.

Axis IX: Combating Violence:

- By 2017, intensify responses for the prevention of violence;
- By 2017, improve support and shelter measures for victims of violence;
- By the end of 2017, qualify technicians in the areas of education, health and social action;
- By the end of 2017, create strategic tools for planning and intervention in the area of equality and fight against violence.

Axis X: Promotion of Mental Health:

- By the end of 2017, create at least an adequate response to the needs of people with mental illness;
- By the end of 2017, stimulate awareness and information campaigns against the stigma of mental illness among the four clusters of schools in the county;
- By the end of 2017, to promote experiences with a view to social and professional integration of people with mental illness;

- By the end of 2017, conduct actions of awareness to promote mental health;
- By the end of 2015, conduct a social diagnosis of the population with mental illness;
- By the end of 2017, create at least an adequate response to the needs of children and young people with mental illness;
- By the end of 2017, promote actions of training/awareness-raising for formal and informal caregivers of people with mental illness.

Axis XI: Promotion and Integration of People with Disabilities:

- By the end of 2017, create at least 2 adequate responses to the needs of people with disabilities in the municipality of Gótica;
- By the end of 2017, to know the current situation of people with disabilities residing in the municipality of Gótica, especially those that have double diagnosis;
- By the end of 2017, inform/sensitize employers to the labor integration of people with disabilities;
- By the end of 2017, promote the rights and protection of people with disabilities and family/caregivers (tutoring processes, among others).

Axis XII: Promotion and Insertion of Ethnic Minorities:

- Until 2017, do a social characterization of the population of Gypsy Ethnicity resident in the county of Gótica;
- By 2017, to promote actions that enable the active citizenship of the Gypsy Community residing in the municipality of Gótica.

Axis XIII: Promotion of Local Social Network Dynamics:

- By the end of 2017, foster participation and communication among CLASS partners with the creation of working tools;
- By the end of 2017, implement work methodologies to optimize the integrated social intervention in the county, with the participation of all the partners;
- By the end of 2017, promote the principles of gender equality in the internal practices of partner organizations.

Based on the priorities and objectives defined in the context of the Social Network, action plans are developed for its implementation. The development of these plans is carried out in partnership by various local agents and institutions, integrating a wide range of social economy entities. Tables 1 and 2 show, for each of the researched territories, the participating institutions, their typology and field of action.

**Table 1: List of social economy institutions participating in Lugarão's Social Network<sup>2</sup>**

<b>Name of the institution</b>	<b>Type of institution</b>	<b>Field of Acting</b>
Associação Passo a Passo	IPSS	Reduce and Prevent: the number of institutionalized children; child neglect and maltreatment. Promote: parental skills; family empowerment; citizenship rights.
Olhar com Saber	IPSS	Home support services for the elderly; SPA and Hairdressing for the elderly; Laundry & Ironing; Food bank; Other Projects and Initiatives.
CESIS - Centro de Estudos para a Intervenção Social	VNPE	Children and young people; human rights; social rights; aging and the elderly; gender equality; migrations; ethnic and cultural minorities; homeless; poverty and social exclusion; social politics; work and employment; violence.
Cruz Vermelha Portuguesa - Delegação da Amadora		Its activities and humanitarian services range from home support for the elderly to Proximity First Aid, Health Care, awareness of young people to different issues, monitoring of vulnerable groups and vocational training, among many others.
CEBESA - Centro de Bem estar Social da Amadora	IPSS	
CUTLA - Clube Universitário Tempo Livre da Amadora	VNPE	Senior University. It offers more than 50 different disciplines, in the areas of Culture, Arts, Sports, Informatics and Leisure.
AJPAS-Assoc. de Jovens Promotores da Amadora Saudável		To strive for the exercise of citizenship of persons in situations of social exclusion or victims of inequality, through a global and integrated community intervention, with a view to prevention of health risks, training of youth and adults for labor market integration and Provision of care for children, young people and adults.
AMORAMA	IPSS	The purpose of the institution is to rehabilitate and integrate young

<sup>2</sup> Label: Coop: Cooperative; Mut: Mutuality's; IPSS: Private Institutions of Social Solidarity; Mis: Misericórdias; LGRDAF: Local and Regional Development Associations and Foundations; SE: Social Enterprises; VNPO: Voluntary non-profit entities that produce market services for families.



		people and adults with profound disabilities, with the main objective being the personal and human enhancement of the disabled person, through occupational activities and the development of skills for interaction and social maturation.
Fundação AFID Diferença	IPSS	Promote the creation of structures that guarantee the Rehabilitation, Health, Education, Training, Deinstitutionalization and Integration of Persons with Disabilities, their Families and other disadvantaged groups, with Quality; Develop actions to support disadvantaged and isolated populations, namely, the Elderly and Young people; To develop Arte-Therapeutic and Cultural activities with authors with Disabilities and other disadvantaged groups, with an end to Inclusion; To shake up in the community an interest in the problems of Disability and disadvantaged groups; To promote the activities of protection and early detection of Disability.
Santa Casa da Misericórdia da Amadora	Mis	Social action; Education; Elderly; Health.
AERLIS - Assoc. Empresarial da região de saude.pt Lisboa	VNPE	Information; Formation; Provision of Services; Internationalization; Promotion of Integrated Regional Development; Representation of Members' Interests.
Cooptécnica-Gustave Eiffel CRL	Coop.	Education and training.
Associação de Socorros Médicos "O Vigilante"	VNPE	It aims to provide care for curative, preventive and rehabilitative medicine, protection and support for children, through, among others, centers for medical care, nursing, home care services and day care centers.
Associação "Ajuda de Mãe"	IPSS	Infant care
Coo (op) ração - Cooperativa de Solidariedade Social, CRL	Coop	Elderly support in training, occupational activities, nutrition and cultural activities.
Clube de Natação da Amadora	LGDAF	Sports club
URPIA - União de Reformados, Pensionistas e Idosos da Amadora	IPSS	Home and rest home for the elderly.

AURPIF Assoc. Unitária de Pensionistas e Idosos da Falagueira	LGDAF	Activities for the elderly
Organização Mundial de Educação Pré-Escolar	IPSS	Increase in Schooling; Development of a sense of belonging to the community and society in general; Promotion of Employability; Lobbying and Advocacy.
Associação de Solidariedade Social do Alto da Cova da Moura	LGDAF	
Centro Cultural Roque Gameiro	LGDAF	Cultural and artistic activities at the local level
Casal Popular da Damaia	IPSS	5 Social Responses: Kindergarten, Kindergarten, Activity Center and Free Time; Day Center and Domiciliary Support.
Cooperativa - Cooperativa de Desenvolvimento Social, CRL	Coop	
Centro Social Paroquial de S. Brás	IPSS	Develop projects in articulation with the cultural and social services of the community; Establish community service delivery programs as an integral part of citizenship education and values; To promote the insertion of the person in diverse social groups, with respect for the plurality of cultures; Contribute to equal opportunities in access to services and to successful learning and social integration; Encourage the participation of families.
SFRAA - Quinta de S. Miguel	IPSS	Day centre for the elderly
Associação Cultural Moínho da Juventude	LRDAF	Social programs in the following areas: socio-educational; socio-professional; socio-cultural; socio-sports; socio-legal.
Associação Unidos de Cabo Verde	IPSS	Promotion of economic, social and cultural activities.
Pressley Ridge	VNPE	Diverse projects aimed at children and families, which includes training, cultural activities, occupation of leisure, etc.
Associação de Solidariedade SUBUD	IPSS	Promotes 4 social responses (Day Care, Pre-School, Centre of Activities and free Time and Youth Movement) and an Integrated Support Center with 4 Offices (Center for Psychopedagogical Resources, Office of Family Support and Mediation, Office of Therapeutic Support and Social Support Office).

CERCIAMA	Coop.	CERCIAMA has 6 social responses: Occupational Activities Center (CAO), Residential Unit (UR), School of Special Education (EEE), Early Intervention (IP), Resource Center for Inclusion (CRI) and Support Service Domiciliary (SAD).
Associação Cultural de Surdos de Lugarão	IPSS	The Cultural Association of the Deaf of Lugarão has as Mission to support, defend and promote the rights, social and cultural interests, economic and professional of the deaf, with action at national level.
Feixe Luminoso	LGDAF	Non-profit association aimed at supporting society in culture, health, education and social aspects
Fundação Pão de açúcar AUCHAN	IPSS	Social action in the areas of: family support; bank of social equipments; educational support; activities for leisure times.
Fundação Aga Khan	LGDAF	Areas of activity: education; aging; cultural development; working with Portuguese speaking countries.
Aproximar, CRL T	LGDAF	Business consulting and promotion of entrepreneurship.

**Table 2: List of social economy institutions participating in Gótica's Social Network<sup>3</sup>**

<b>Name of the institution</b>	<b>Type of institution</b>	<b>Field of Acting</b>
Associação "Ajuda de Mãe"	IPSS	Infant care
APPACDM de Santarém-Ass.Port.Pais e Amigos Cidadão c/Deficiência Mental	IPSS	Promote and stimulate the development of people with disabilities and their inclusion in society; Provide support to their families and co-responsible the State in defense of the rights of these Citizens.
ANDST - Associação Nacional de Deficientes Sinistros no Trabalho	IPSS	Its main activities are: Activity demanding a policy of social justice; juridical support; Social and psychological; And support for the family, social and professional reintegration of workers who are victims of accidents or occupational diseases.

<sup>3</sup> Label: Coop: Cooperative; Mut: Mutuality's; IPSS: Private Institutions of Social Solidarity; Mis: Misericórdias; LGRDAF: Local and Regional Development Associations and Foundations; SE: Social Enterprises; VNPO: Voluntary non-profit entities that produce market services for families.

ARPIVALE- Associação Reformados Pensionistas e Idosos Vale de Santarém	IPSS	Home and rest home for the elderly.
Associação de Apoio a Deficientes com Paralisia Cerebral Maria do Carmo Silva Melancia	IPSS	Education; Social and solidarity; Culture; Sport
Associação de Socorros Médicos "O Vigilante"	VNPE	It aims to provide care for curative, preventive and rehabilitative medicine, protection and support for children, through, among others, centers for medical care, nursing, home care services and day care centers.
Associação de Solidariedade Social e de Melhoramentos de Amiais de Baixo	LGDAF	Social Solidarity.
Associação dos Familiares e Amigos de Doentes Psicóticos "A FARPA"	IPSS	Psychiatry and Mental Health.
Associação para o Desenvolvimento Social e Comunitário de Santarém	VNPE	Promote and encourage local development through working with socially disadvantaged populations, supporting them in their active and social lives by providing them with a better quality of life.
Associação Picapau	VNPE	To provide care and social and professional training for ex-drug addicts.
Banco Alimentar Contra a Fome de Santarém	IPSS	Food bank.
Cáritas Diocesana de Santarém	IPSS	Social action at the local level.
Cáritas Paroquial de Tremez	IPSS	Social action at the local level.
Centro de Apoio à Comunidade de Casével	IPSS	CeSAC's main objectives are: (A) Protection of the Elderly and Disability. B) Support for Social and Community Integration. And by secondary objectives: A) Support for children and young people. B) Support for the family, and its scope of action covers the parish of Casével; Neighboring parishes and other parishes of the Council,
Centro de Bem Estar Social de Vale Figueira	IPSS	Cultural, recreational, leisure and intergenerational activities, with school, scouts and other Institutions of the county. Training actions and activities for the various age grades, in Informatics, Music, Decorative Arts, Female Entrepreneurship, Gerontomotricity, among others. Actions of integration, social insertion and community.

Centro de Cultura e Recreio Alexandre Herculano	IPSS	Work in the area of Solidarity in the social responses of Day Center, Domiciliary Support, Social Canteens and Technical Aids.
Centro de Solidariedade Social de Santarém	IPSS	Work in the area of Solidarity in the social responses of Day Center, Domiciliary Support, Social Canteens and Technical Aids.
Centro Educativo e de Solidariedade Social EZN da Fonte Boa	IPSS	Among other valences of social support emerged the nursery that received about 34 children, children of the staff of the Zootécnica Fonte Boa station. The structure has been growing over the years and we currently have capacity for 58 children in kindergarten, 125 children in kindergarten and 40 in Activities of Leisure Time.
Centro Social da Freguesia da Moçarria	IPSS	Plays an important role in the area of Solidarity in the social responses of Day Center, Domiciliary Support, Social Canteens and Technical Aids.
Centro Social de Santa Marta de Alcanhões	IPSS	Cultural, recreational, leisure and intergenerational activities, with school, scouts and other Institutions of the county. Training actions and activities for the various age grades, in Informatics, Music, Decorative Arts, Female Entrepreneurship, Gerontomotricity, among others. Actions of integration, social insertion and community.
Centro Social e Paroquial do Vale de Santarém	IPSS	Cultural, recreational, leisure and intergenerational activities, with school, scouts and other Institutions of the county. Training actions and activities for the various age grades, in Informatics, Music, Decorative Arts, Female Entrepreneurship, Gerontomotricity, among others. Actions of integration, social insertion and community.
Centro Social Interparoquial de Santarém	IPSS	It is an institution dedicated to support the elderly and children, having the following values distributed in 4 units: kindergarten; Day Center; Domiciliary Support; home.
Centro Social Paroquial de Santa Margarida Abrã	IPSS	They provide support to about 120 children in day care services, family support component (pre-school) and

		study room (1st cycle). Many of the families supported by the Institution are economically vulnerable and / or beneficiaries of Social Integration Income.
Centro Social Serra do Alecrim I.P.S.S.	IPSS	The association aims to support children and young people and to promote and protect elderly and disabled citizens.
Centro Solidariedade Social Nª Senhora da Luz da Póvoa de Santarém	IPSS	Day care and domiciliary support.
Fundação Luísa Andaluz	VNPE	Home for children and young women whose life has permanently or temporarily deprived them of their families.
Lar de Santo António da Cidade de Santarém	IPSS	Day Care and Home for the elderly.
Lar e Repouso do Ribatejo Lda	IPSS	Day Care and Home for the elderly.
Lar Evangélico Nova Esperança	IPSS	Day Care and Home for the elderly.
Lar Golden Haven	IPSS	Day Care and Home for the elderly.
Movimento de Solidariedade Rural	LGDAF	Socio-cultural formation; professional qualification; Animation and support to local development projects.
Re-food 4 Good - Núcleo de Santarém	VNPE	Food Bank.
Santa Casa da Misericórdia de Alcanede	Mis	Home support; Day Center; Home for the Elderly; Formation.
Santa Casa da Misericórdia de Pernes	Mis	Home for the Elderly; Day Center; Domiciliary Support; Single Family Residences; Student Residence; Home of Great Dependents; Social Canteen.
Santa Casa da Misericórdia de Santarém	Mis	Childhood and Youth: Kindergarten / Pre-School; Temporary Shelter Center for Children at Risk; Free Time Activities Center; Home for Children and Youth. Elderly: Day Center; Domiciliary Support Service; Home of Great Dependents; Emergency Center for the Elderly Health: Long Term Care and Maintenance Unit.
SERHOGARSYSTEM	SE	Home support and domestic services

To these institutions we must add local public entities, decentralized state services, private companies (although with a small presence) and other local stakeholders (social partners, business associations, other associations not strictly linked to social intervention).

Initiatives and coordination of actions are usually the responsibility of the Municipality. While it is true that this model has fostered the coherence and better articulation of the various participating institutions, the dependence on the initiative and ability levels demonstrated by the municipalities gave rise to considerable asymmetries within the country regarding the efficacy of SNs' works.

The analysis of the list of institutions allows, in the first place, to highlight the high presence of social economy activities in each of the territories. Indeed, the social institutional network has a great strength at the level of local action, covering the various traditional values of this area: poverty and social exclusion; elderly; children and young people; training and integration of the unemployed; disabled people; health; etc. In the second place, we highlight the marginal presence of social enterprises, not being a common typology in the Portuguese institutional fabric.

Based on the integrated analysis of objectives and institutions, we point out that the municipality of Lugarão presents a superior dynamic on the functioning of the local Social Network. On the one hand, we identified on their documents of planning an effective prioritization at the level of the axes and the definition of objectives, while in Gótica the documents shows an action that is still very broad and not very focused. On the other hand, the profile of social economy entities indicates a greater diversity in the type of entities, while in the case of Gótica the IPSS constitute the dominant profile.

### 3. Influence of social economy initiatives on investigated households facing crisis

Portugal is a country with very low general levels of civic participation and engagement in collective action instances. Social economy organizations are no exception.

Drawing on data from eight European countries collected between 2001 and 2003, Veigas & Santos (2009), confirmed this situation. Only 4,0% of Portuguese were members of social solidarity organizations, less than half of the analogous rate in Spain (8,6%) and a far cry from those recorded in the Netherlands (22,8%), Sweden (38,1%) or Denmark (40,4%). A later survey carried out in Portugal in 2009 showed no changes in this regard (Viegas & Santos, 2011).

If anything, the data from our interviews suggests an even greater degradation in this regard. Throughout our sample, the increased hardship stemming from the crisis led to an accentuated tendency for isolation and less – not more - participation in public space. Several of our interviewed households stopped having means to move around and to participate in activities – even leisure ones - outside of their home. Also, tackling with new hardship was shown to consume a considerable amount of their free time. We identified several situations where people reveal unavailability for any leisure activity, being so consumed in work and household needs. Some even confess embarrassment for not being able to satisfy the smallest everyday leisure consumptions, like going to the cinema, eating out or drinking with friends. Even among the younger respondents, the trend is for narrowing in relations and replacing the traditional local life sites (such as cafés, restaurants, bars and leisure associations) with each other's homes as place to meet.

Thus, it is not surprising that the interviewees in our sample had little involvement in the activities of the social economy organizations other than as beneficiaries. The few exceptions we registered were cases in which the interviewees took up volunteer activities at institutions in which they were also beneficiaries.

Thus GE/L, who tends to a vegetable garden in vacant lands next to his home, describes how he helps works at the garden maintained by the local SCM – whose social workers also with him as part of his minimum guaranteed income social integration plan.

*“I have been doing some volunteer work here at the garden. Twice a week. [We cultivate] some cabbage, some beans and some peas.(...) I don't keep them, because I have it a home. Otherwise, I could take something, right? It's to give to people, who need cabbage. If someone needs, it is given to them. [The foodbank] gives people some rice, dry pasta, cheese and things like that. But they don't give them cabbage [fresh vegetables].” (GE/L/R1)*

Likewise, T(J)/G began making volunteer work at the local SCM, where she was taking training courses – something that would later lead to her taking a paid part-time job there.

*“When I left [a temporary job] we had to reactivate all the process [for the minimum guaranteed income] here. So it took some two or three months until we received some money. During that period, we didn't have anything to do. Then came the possibility of coming to these*



*training courses, to at least keep my head thinking about something. I did some courses. And so people told me “why don’t you send in a CV?” and what not. Then it came... They need someone and no one was showing up. So I did the course but I also started volunteering. I finished. I came in the morning or in the afternoon. I helped feeding the bedridden at the nursing home. I gave lunch, took a break, then the afternoon snack. Then I left to pick my children from school. I still did it for some two months” (T(J)/G/R1)*

Taking to the sample as whole, our fieldwork data suggests that social economy institutions have played three basic roles in the resilience processes involving our interviewees: support to state redistribution policies; direct provision of jobs; and channelling donations from food banks.

The role of *auxiliary to state redistribution policies* is the more salient in our sample. This role translates into three forms: raising our interviewee’s awareness to the existence of specific transfers; supporting their application to these social transfers; and support in the fulfilling of the obligations that are tied to such transfers, such as mandatory periodic renewals, job searches and training activities.

TJ/G mentioned how the SCM helped them review their options after finding out they did not qualify for unemployment benefits:

*“The RSI [minimum guaranteed income scheme] team here [at the SCM] was the only one that helped us, because we didn’t qualify for unemployment benefit. [My husband] never qualified for the benefit because he was the managing partner. And I was also managing partner of the theme park firm, so I didn’t qualified either. I contributed to the Social Security for two years – and in the end I wasn’t entitled to anything. And all the jobs I had afterwards were never stable – I worked by the month. It was basically covering for someone’s holidays or ramping up a few hours. It was not enough for getting the benefit. The only one [we qualified for] was the RSI.” (TJ/G/R1)*

In turn, PE/L also came into contact with the SCM while trying to deal with an administrative error that was blocking his application to the minimum guaranteed income:

*“I applied for the minimum income because I was having trouble finding a job. But then they suspended the minimum income - and I couldn’t figure out why! So I ended up being evicted and this girlfriend of mine took me in her house. (...) It was a mistake by the Social Security. I went to the Social Security and they told me that they had sent me a letter and I hadn’t answered it. Though they later assumed that there had been no letter sent. It was because of this that a social worker from [the SCM] contacted me and I came to talk with her.” (PE/L/R1)*

AS/L describes how social workers from the SCM routinely supported her with the mandatory job searches that are part of the conditions to receive minimum income:

*“The [SCM social workers] are awesome! Like [social worker name] in job searching... They send our CVs through the computer and check which jobs are there and which are not. [Interviewer: do they make this search with you?]. Exactly. They have everything ready!” (AS/L/R1)*

Another important role that social economy we found was the direct provision of jobs within the institutions’ own activities. Three of our interviewees – all women – worked on nursing

homes that were run by social economy organizations. However, all these jobs on short-term contracts, partly or totally funded by the state employment programmes.

We already saw how T(J)/G initial volunteering activities turned into a part-time paid job. Another example was provided by NO/L. She lost her job in the furniture factory where she had worked for 24 years. Since then, she has been in on-and-off job at the nursing home of her village, which is run by a local social economy organization.

*“I was at home for 3 or 4 months [after losing her job]. Then I was summoned [for working] here at the nursing home of [village]. I did an occupational programme there for 8 months. After 8 months, I returned home. Then, after another 4 months, they [the nursing home] needed people and sent for me. I’ve been working now for a year and a half. I don’t know if I will stay on or not. After next month, we’ll see.” (NO/L/R1)*

PA/G also found short-term work at a social economy organization through such state-funded occupational programs. Note also how, in this excerpt, she also hints at the prejudice targeting Roma people.

*“I was summoned to the Job Centre. I came to an interview with [director of the social economy organization]. I was accepted because I was willing to work and I demonstrated that willingness to work – even if I am of gypsy ethnicity. They are used to gypsy women always finding excuses to avoid working. But I really wanted to work. I used to sell at fairs, so this had nothing to do with the trajectory I had until then. They saw that I was very interested and was called [to work] straight away” (PA/G/R1)*

Finally, social economy organizations performed as distribution channels for national or municipal-based food bank schemes. Several of our interviews benefitted from these banks in more critical moments.

*“At that time, we went to see [name], which is a social worker. She saw how sad we were. I even cried because I had nothing to feed my children. So she called the Santa Casa and spoke to someone – I don’t know who. Then they called us and give us a small bag with some food: rice, dry pasta... (laughs). For someone who buys several liters of milk [for the children] it’s complicated to see just one pack inside a bag.” (PA/G/R1)*

*“I was receiving [food] through [local organization], which is up here... It was very important, particularly regarding my son, who was always my main concern. The fruit was rather poor – it’s leftovers from supermarkets. They gave me instant cereal, biscuits and milk and also food for the rest of the family: olive oil, dry pasta, canned sausages, rice, tuna. Sometimes, they would send yogurts for my son. They gave according to what they got. I use to go there once a month and they would give me a decent amount. Sometimes they gave us frozen food. Of course this was a great help!” (CL/L/R1)*

*“We have Santa Casa, who helps me in regards to food. The help I got was from them... When they have something to give, they call me to come and get it... I don’t remember the last time I received it, but it was a while ago... [social worker from SCM name] spoke to me, that they will see to it and she’ll call me back when it’s time to go there... They give us olive oil, they give us*

*pasta, they give us biscuits, they give us marmalade, they give us a lot. And that's a good help already." (EL/L/R1)*

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