Gender and Well-Being
Interactions between Work, Family and Public Policies

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In the year 2003, as far as the social transfer of the state compared to the GDP is concerned, Spain was in the 18th place out of the 29 richest countries in the world integrated in the OECD (Organisation for Economic Cooperation and Development). In the same year, Spain was the 4th country from the bottom line in the OECD countries – above Mexico, Korea and Turkey- as far as the GDP rate devoted to social transfers in cash or services for the families is concerned. At the same time, the figures about the year 2004 show that Spain was located in the last positions of the OECD with regards to the fertility rates that were kept far below the average rate of the countries mentioned before. In Spain –as well as in Italy and Greece– that asymmetrical process between income and fertility have not been accompanied by a similar increase in the female activity and occupation rates The arguments through sociology, the political science and economy have fed the current debate about that matter. Indeed, the insufficient development of the welfare state in Spain, the weak institutionalisation of the family policies, the rare social transfers in cash or services for the families, the segmentation of the work market related to the sex of the persons, the rare development of lodging policy for the young, as well as the idea of family (“familiarism”) developed to make up for the lack mentioned before explain together with other elements the data stated before. The aim of that paper is to show, in a more qualitative than quantitative perspective, the evolution of some of these arguments in the long term, that is to say in a historical perspective, in order to explain the specificity of the Spanish case.
I. Theoretical and methodological frame.

Recently, from the economy of the development and from the economic history, a great attention is being given to matters linked to well-being and poverty. Poverty appears as a relative and multidimensional phenomenon. Relative, as each society in each moment fixes the poverty line at a determined level depending on multiple factors that are economic as well as cultural. For example, an inhabitant from a sub-Saharan country will probably consider that the poverty line that we fix in Spain to access to determined social aid corresponds to a situation of clear privilege. Multidimensional, since the variables that have an influence in situations of shortage are not only economic but also political and cultural.

The new contributions by Amartya Sen, with his theory of the social choice and the access to well-being, are being essential. In that respect, the access to well-being would not only come from the material resources available but would come determined by the increase of the capabilities or possibilities of the persons’ choice. According to that definition, inequality, in Debraj Ray’s words, could be understood as the basic disparity which allows an individual to have access to certain possibilities of choice or capabilities while these are denied to someone else. The concept taken this way is very complex due to its enormous multidimensionality which is, at the beginning, immeasurable. For example, two persons whose money incomes are the same can have very different possibilities of choice if one of them is for example a disabled person. In the same way, the possibilities of choice of a person with more income but who lives in a dictatorial context, compared to those of somebody else with less income but who lives in conditions of bigger freedom are incomparable. In that respect, Amartya Sen has emphasized the limitations the income has as the measure of inequality and poverty, stating that its influence on the individual capabilities changes depending on the community it is dealing with, the family and the individual for sex reasons as well as ethnic group or age. Furthermore, all this gets complicated even more because of the influence of the distribution of the income in the bosom of the families (for example, through the preference of the sons before the girls, the differential diet between the men and women of a same home, or through the concentration of non-paid house work for the women, which significantly reduces her freedom and capability of choice). As for the family is concerned, Amartya Sen defines it as a space of “cooperative conflicts based on a permanent negotiation process”. The capability of women’s negotiation in
the bosom of the family will depend on a lot of factors from the environment itself: a legal frame of equity, the access to education, the possibility to develop a bigger self-esteem inside and outside the home, the possibility to participate in the decision making of the community, the capability to access to infrastructures of social aid or the capability to live in a sustainable ecological environment, are aspects that make easier or more difficult the empowerment of women in the community. That is why the social policies that make it possible to increase the capability of women’s negotiation end up directly in the increase of well-being in the homes. The access to well-being will come determined not only by economic factors but also by political and cultural factors.

From the economic history, Peter Lindert has drawn our attention to the importance of the social policies and the social transfers for the growth. The same author has established a typology of social expenses according to which we can distinguish three levels according to the necessities they cover and the people to which it is directed. A first level which would correspond to the care given to a part of the people formed by those in need and those who depend on others, because of either age or disabilities that could be physical or psychic or even because of temporary unemployment. Generally speaking, it would correspond to the proper welfare of the Old Regime. A second level which would correspond to the social expenses which affect all the population, whether they are dependent or not (old age pensions, health expenses or expenses linked to housing policies –housing for workers, cheap houses-). That second level would start to develop itself in Europe as well as in Spain from the 1880s and during the first third of the 20th century, leading to a growth and diversification of the social expenses. The essential characteristic would lay in the fact that at this level, the welfare would be directed to all the population as a whole. And lastly, there would exist a third level that would correspond to social expenses in education. This paper will only deal with the first two levels: from the welfare for those in needs to the social care for the citizens.

The work hypothesis that this paper sustains consists of the fact that the family has formed the basic and stable welfare support, against the ups and downs of the other welfare agents (State, Church, Mutual aid, private initiative), all subjects to the political and social conjuncture. In that respect, the construction of the liberal state and of the market economy had made invisible the necessary processes to sustain the human life
(in terms of Antonella Picchio), processes that essentially remained relegated to the home and to the women in each family.

Frame 1. The access to well-being

Basic necessities

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Resource: own production

However, we can notice that in determined cases, the ups and downs of the different welfare agents are not exclusive. Peter Lindert shows that the private and public services may grow up in a parallel way, extending this way the offer of social security benefits. This public and private growth of social cover, its extension and diversification would probably reduce the family charges, the dependants. In that respect, there should be the possibility to establish the degree of elasticity of the family capability in order to sustain dependants: it will depend not only on the family income but on the degree of women’s emancipation concerning the decision making and her participation in the work market. Conclusion, the availability of the family as a service provider will depend on the political and legislative frames on the one hand, and on the degree of democratic participation on the other hand. This is what this very paper claims to show.

The main problem we have to face is the lack of unified statistical resources for the long term in order to be able to show the evolution of the social transfers from the Church,
the State, the Mutual Aid, the private initiative and from the family itself. For that reason, the objective of the present paper is a qualitative approach of the main welfare agents and its evolution between the 18th and 20th centuries.

II. The welfare providing agents and their evolution.

The welfare providing agents
The way in which the society of contemporary Spain faced the increasing social and economic inequalities which went along the modernisation process consisted of developing a welfare work and protection system that was both flexible and plural. That very system comprised different social security agents, the specific details of which had been developed for centuries of social action. However, as we will see, families have been the welfare agent par excellence, in charge of covering the necessities of its members and the defects of the welfare system itself. Several agents integrated the above mentioned system. On the one hand, the public agents, that is to say, the Crown, the State, the Region, the Province, the Municipality (the Town Council). On the other hand, the private agents, which corresponded in those comprised in: a) the Church (religious orders, ecclesiastical foundations, parishes), b) the mutual help organisations (brotherhoods, guilds, foundations of individuals, associations and mutual aid societies, friendly societies, emergency funds, trade unions, or nowadays, Non Governmental Organisations) and c) The particular action (lay-natured foundations, Ladies’ Committees, Employers’ Associations, Savings and Old-age Banks, NGOs)

The distinction between the nature of some agents and others has not always been sharp. Let’s have a look at it. First of all, there exist some historical periods in which the border between public and private state dissolves – that is the case for example of the 19th century town councils. To a great extent, the resources managed by town councils came from the confiscation of the particular or ecclesiastic initiative. The municipalities were monopolized by local oligarchies which pushed brotherhoods, guilds or foundations to decline by concentrating and controlling the resources of the Church and other institutions of solidarity.
### Frame 1: Welfare providing agents

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<td>Particular action</td>
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<td>Informal networks</td>
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Second, it is difficult to establish a clear frontier between some ecclesiastic kinds of organisations and those of mutual help, like for example, the brotherhood associations, the foundations of individuals or the parishes themselves all through the 18th, 19th and a big part of the 20th centuries. Institutionally speaking, although the parishes used to be allocated to the ownership of the Church, they have nothing to do with the religious orders from the point of view of welfare, because they are canals of municipal proceedings which convey actions from the lower scales, and they do not represent such an institutional and ecclesiastic action as the clergy’s. In history, parallel to the municipalities, the parishes have very often acted as scenes of intervention of local
forces, more than as truly ecclesiastic institutions. It is essential to make a difference between the social action that was truly ecclesiastic and the social action coming from the people, shaped in the context of associations and activities nearly necessarily linked to the Church, which was the most primary and usual field of meetings and collective action in the Spanish society until nearly the last third of the 20th century. Welfare places and initiatives like the guilds, the brotherhood associations, the religious foundations, the helping associations for the poor, the distributions of charity, the popular charity collections, the conferences, the Ladies associations, the local foundations cannot simply be qualified as ecclesiastic, because, even if they were carried out around the Church, their nature and origin, however, were eminently popular, caring and with a frequently mutual characteristic. Third, at the beginning of the 20th century, we witness initiatives that are difficult to classify between workers’ mutualism and interventionist state. For example, the constitution of some social insurances linked to the Workers’ Retirement in which one could find mixed formulas between the employers, the workers and the state are difficult to classify before the constitution of its compulsory character in 1919, since they happened in a period when both the State and the Mutual Aid converged.

The welfare agents: dynamic vision

So far there have not been any long term statistic series which allow to establish the percentage of gross domestic product (GDP) that was used in welfare transfers from the state to the families, and there are not any studies either yet that allow to quantify the help given from the Church to poor people and people in need or the real extent of wealth redistribution on the part of the mutual help organisations. There are only fragmentary contributions that illustrate some of the aspects of those mentioned before. Concerning the family as a services and cares provider, the difficulty to establish some comparative measure turns out to be even more difficult. For that purpose, we have chosen to suggest a model of evolution of the agents of welfare providers built from the tendencies the inflection points of which would come up determined by qualitative variables such as legislative, political and social measures.

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1 Carasa, Comin, Herranz,
Frame 2: welfare provider agents: a dynamic vision.

Frame 2 shows the evolution of different welfare providing agents from the impact of legislation on the one hand and the political frame, on the other. We can see the continuity of the importance of the family as welfare provider, the opposite direction between the Church and the State in the welfare participation, and finally the impact of democratising conjunctures in the increase of the role of the state and the decrease of the role of the Church and of the family. Let us have a look at it.

1. The family, and therefore the women in each family, have been the welfare agent par excellence of the whole period we have studied. The family has played the role of the stable support by default, ending up covering all the other actors’ lacks and deficits; we could say that it did not have specific and specialized mission, but it was always there fulfilling some kind of upside down subordination law, the family saw itself forced to act when the authorities, the Church or the private organisations failed to attend the necessities of its members. Or, in other words, the State and the Church only cared for the family when the latter was not able to guarantee the subsistence of the assets and dependents in its bosom, as it occurred during most of the part of the Spanish history. However, the behaviour of the family as the agent of social action often implies the activation of other social networks of informal character which often develop themselves around the family such as the neighbourhood relationships, relatives, comradeship or friendship (FONTAINE).

For Spain, we do not have studies of a quantitative character at our disposal, which show the influence of the political context in the families’ sustainability and in the work, management and cares resources that a woman bring to the family life, but if we take into account that the political conjunctures with a major social feeling and with a major participation of the feminist social movements cause legislative frames that improve the access of well-being to the families, it can be considered that there were two stages in the Spanish contemporary history in which the family, as the provider of social resources and services, has seen its participation reduced: that is during the Second Spanish Republic (in 1931, the Law of compulsory maternity insurance was in force) and from the Transition onwards. However, the lack of Welfare State in today’s Spain explain how, in spite of the decrease of the role of the family and of women as
care providers, the latest law of Spanish dependence make the major part of the dependents’ care weight fall again upon the shoulders of the family. The meagre state of the family protection laws, the slowness of Spain in introducing work and family conciliation laws have now effects on our country’s demography and the extremely low birth-rate of Spanish women.

2. The evolution of the action of the Church as a social agent has also been constant all along the contemporary centuries but experiences a stronger decrease than the families’ during that time. Its fall is probably very light in the 19th century, it improves in the second third of the 20th century (under Franco), and does not get depression until the democratic Transition, already in the last third of the 20th century. It is in this evolution that we perceive that the space the public power will occupy will partly be the one that the ecclesiastic action will leave. In other words, the public power gets better only when the ecclesiastic one gets thinner, because the invasion of the Church has been the main brake in the Spanish national public action and modernization.

The Church in Spain subsisted with a great capacity of resistance to the ecclesiastic institutional welfare activity. It went very strong through the 18th century, with a rebirth of the secular clergy activity which seriously suffered from the liberal reforms and the sales of Church lands in the first two third of the 19th century, but which vigorously bettered in the last third of the 19th century. At the time, the ecclesiastic welfare proved to be almost necessary to solve the serious problem of the social issue, developed by the restoration power as a powerful instrument of social harmonization in front of the emerging class struggle of the trade union movements. That ecclesiastic institutional action strongly went on in the first third of the 20th century, under the intense “re-christianization” of the Spanish society launched then by the Church. After the brief Republican patch, the recovery of the ecclesiastic institutional activity was surprising in the second third of the 20th century, with the heat of the national Catholicism which impregnated all the social action in the fifties and sixties. This is another of the prevailing characteristics of the Spanish welfare system, its rare secularisation, the weak presence of the civil society, strictly speaking, in this sector of activity. More than that, it is characterized by the fact that this civil and popular initiative that was born from the lower scales and which elsewhere adopt lay forms, was here involved in a religious context and in a consecrating halo which has not allowed a franc process of welfare
secularisation, linked for a long time to the religious mentality and legitimacy. That is a pending subject in the history of Spain, the delay in the welfare secularisation, irremediably linked to the catholic charity and morals until hardly 25 years ago.

3. The following strong line of that evolution is marked by the authorities. That matter is not homogeneous all along the time we analyse. It started with the Crown which, during all the modern time, had an activity that was almost marginal; then it continued with local power organisations like the Consell de Cent in Catalonia; then with the town (or local council) in the 18th century and the province in the 19th century, and finally in the last quarter of the 20th century, the region appeared as the manager of the welfare services. Strictly speaking, we have to say that the state tenure of the welfare, that is to say the central administration, has nearly always been very limited and the other administrative levels (the local, the provincial and the regional ones) have been the true actors of the public thing. The weakness of the authorities attracts attention, particularly that of the State, which hardly maintains a certain activity, thanks to the province in the 19th century, more specially due to the process of “provincialisation” (process of province making) of resources coming from the sale of the Church’s lands and concentrated in homes, poorhouses and provincial hospitals in nearly all the capital towns.

It is obvious that the role of the public initiative increased all through the 18th, 19th and 20th centuries but it did so too slowly and following a path full of delays and even retreats. The legislation concerning the public welfare in the 19th century showed the incapacity for the liberal state to face the people’s increasing social necessities and the transfer of these responsibilities to the private initiative and to the social security. The 1812 Cadiz Constitution and the first Law of public welfare in the year 1822 declared the municipal nature of the main welfare institutions: maternity hospitals, homes, hospitals and the home help. The 19th century liberal home welfare recognised that the family played this basic subsidiary role and ended up making it official somehow with the system of home public welfare. This way, the liberal welfare rested in the recognition of the family and home as welfare unities, and as the necessary space to guarantee a minimum of order, productivity and collaboration between popular groups with the urban project of the 19th century middle-class. The 1848 public welfare Law, completed with the 1852 Welfare Rule cut off the functions of the town councils,
reinforced the provincial competence and encouraged the cohabitation between private foundations and public institutions. The 1885 and 1889 General Instruction created the subsidiary nature of the state Welfare stimulating the private action and along with it the generalisation of different forms of Welfare that would be developed from the last third of the 19th century and the first one of the 20th century.

It was then at the end of the 19th century when the 1887 Association Law and the male universal suffrage granted in 1890 forced the upper classes to get involved in the working and welfare concerns of the workers. This way, from the last third of the 19th century, a proto-interventionist current could be seen, carried out from the state in favour of the protection of the worker, fed by ideological heterogeneity integrated by Krausists, conservatives, Catholics, and revolutionaries who thus set up the social reformism that had to give birth to the Social Reform Commission (Comisión de Reformas Sociales) (1881), the Social Reform Institute (Instituto de Reformas Sociales) (1904) and the National Welfare Institute (Instituto Nacional de Previsión), INI (1908). The mission of the latter was to develop and to coordinate all the initiatives of social insurances that would be developed in Spain in a mixed range between state, benefactors, employers and workers, moreover, in a beginning, without the obligatory nature. Consequently, the old age or health insurance were not compulsory and did not have a universal character. This way, the social achievements in the late 19th century and the early 20th century were managed by the State interventionism and the workers’ friendly society, but they remained far from the social rights that had to guarantee the future welfare state. During the Second Republic we witness the project of unification of social insurances, about the improvement of two of the already existing insurances, the one about the worker’s retirement and the one about maternity, and created some other new ones (illness, disability and death), but it could not be passed before the coup d’état in July 1936 and the Civil War as a consequence of it.

It was not be until the last third of the 20th century, with the implementation of the Welfare State during the democratic Transition, that the State could be declared the main welfare actor in Spain. We have to underline the delay this welfare actor experienced in the 19th century and in the first two third of the 20th century, when in

2 Alerx, 1917 Retiro Obrero Obligatorio
other western parts they were already leaders in this activity ______ . This public delay together with the family importance and the persistence of the Church were probably the three most prominent characteristics of our history and the most determinant factors that are influencing the delays and peculiarities that the Welfare State has ever had in Spain.

The institutions, organisations and networks of Ayúda Mútua (Mutual Aid) constituted in themselves a private agent that provided extremely important care. First of all, its main characteristic lay in its spontaneous character, since it was created “from the bottom”; secondly, in its far-sighted nature since they had to deal with the prevision of situations of risks; finally, in its welfare action in front of illnesses, death, old-age or where appropriate unemployment. Those organisations of mutual aid got developed within popular, craft or even religious groups, like brotherhoods, guilds, religious foundations, mutual aid societies, and later the proper trade unions, rural savings banks of credit or cooperatives.

However, in its evolution, we have to distinguish two stages. The first one corresponds to the forms of social security that were typical of the old Regime. The brotherhoods already appeared in the 14th century as an association of people with religious affinities, who paid some fees, which in case of necessity (disease or death) benefited themselves or their families. Then, the guilds, which from the 15th century, were constituted in a kind of social security able to provide the family of the guild members with money or medicine subsidies in case of illness or death. From the 17th century, the Hermandades de Socorros (Brotherhoods of Aids) were created to face situations of illnesses, death or burial expenses. In the 18th century, the Friendly Societies appeared, which, together with the previous benefits, started to cover old-age subsidies. It was not until the beginning of the 19th century that the Sociedades de Socorros Mútuos (Mutual Aid Societies) -very similar to the English Friendly Societies- formed by wage earners in order to protect themselves against the expenses coming from situations of illnesses, disability, medicines, doctors, and exceptionally retirement. However, those organisations of mutual aid were formed by the most qualified workers, able to pay rates in a steady way, and consequently, they only covered the necessities of a minor part of the working population.
There exists a second period in the path of mutual aid in Spain, which identified itself with the violence of the protest of the workers’ movement at the beginning of the 20th century. This movement, organised in associations, trade unions and parties, fought for giving a boost to the mutualism that was in practise until then, aiming at getting what later would be called social rights of universal nature, which would guarantee compulsory accident, illness, retirement and unemployment insurances for the manual and non-manual workers and for the farmers. All in all, in the inter-war period, the Spanish mutualist movement, in spite of being weaker than those in France, Belgium or Italy\(^3\), played an important role in the achievement of compulsory social insurances. However, the Welfare State in Spain was not a more or less developed reality until the last third of the 20th century, with the democratic Transition.

4. Other forms of particular action, and therefore private, linked to welfare have been among others the lay natured foundations, the ones called Juntas de Damas (Ladies’ committees), the lay natured Employers’ Associations, the Savings and Old-age Banks, or the Non Governmental Organisations, among others. It can be said that those agents that provided welfare and which were not part of the religious welfare, the public welfare or of the mutual aid have not played a major part, but their presence has been constant all through the contemporary period. Nowadays, that field of welfare nourishes the sector of services, which in determined cases replaces the public and particular sectors in the form of voluntary aid and non governmental organisations.

III. CONCLUSIONS

In the Spanish historical journey that goes from the subjects as private social workers to the establishment of the public initiative, we find out that this drifting from the particular thing to the general one, from the private one to public one, occurs in Spain at a very slow pace, with the subjects as both private and family social workers resisting very strongly. That public delay together with the family leadership and the persistence of the Church have probably been the three most prominent characteristics of our

\(^3\) Quinteiro ester 1984
history and the most determining factors that are influencing in the delays and peculiarities the Welfare State has ever had in Spain.

In Spain, as well as in the Latin American countries, the family has been par excellence the providing space of social services, with the women as its main agent. This idea of family (previously called “familiarism”) developed all along the last two centuries first compensated the lacks of social security state and later, in the last third of the 20th century, of welfare state. However, History has shown us that Spain followed the important stages proper of the development of the European social welfare. First, between around 1750 and 1880, people witnessed the building up of a liberal system of welfare just as most of the European countries were carrying out. Second, between 1880 and 1936, appeared the different attempts boosted by the workers’ movement and the democratising wave, materializing itself in the development of the Mutual Aid, the forecast and the first forms of social insurances, converging this way on the rhythms marked by Peter Lindert for most of the European countries. Third, the period going from 1940 to 1975, which meant a clear isolation of the welfare states created in Europe after the Second World War. And finally, the last third of the 20th century happening at the same time as the democratic Transition and the emerging of the Welfare State.
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