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Franz Rothenbacher

The European Population: A Historical Data Handbook for 21 European Countries from 1850–1945

This contribution describes the project which is to publish a historical data handbook on the European population in 21 European countries, covering the time period of the first demographic transition, the years 1850–1945. All eighteen Western European nations are included plus the three Eastern European countries Czechoslovakia, Hungary and Poland. The handbook covers such topics as population development; the population structure by sex, age and marital status; the regional population structure; annual vital statistics developments in the fields of population growth and migration, fertility and legitimacy, infant mortality and life expectancy, nuptiality and divortiality. Furthermore, household and family data have been collected systematically using the population censuses as a basis. The book comprises several introductory comparative chapters and 21 national chapters for each country. Extensive documentation of available data and sources concludes the volume.

Background

The origins of this handbook go back to the research project ‘Family Change and Family Policies in the West’, started in 1994 at the Mannheim Centre for European Social Research (MZES) in Mannheim, Germany. The project had an international perspective, covering the main Western and three Eastern European countries: Austria, Belgium, Czechoslovakia, Denmark, Finland, France, Germany, Greece, Hungary, Italy, The Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland, and the United Kingdom. The project also included some non-European countries: Canada, New Zealand, and the United States of America. From the beginning, Iceland, Ireland, and Luxembourg were not included, nor were the Eastern and south-eastern European countries. The project produced standardized case studies for all project countries and two additional comparative volumes: one volume on family change, and one on family policies. While the project focused mainly on family policy and used demographic, household, family, and employment structures as a baseline and framework for the national family policy profiles, it soon became clear that in the realm of demography and household and family statistics the available data could not fulfil the project requirements. The project had a very long time horizon, reaching back—at least metaphorically—to the nineteenth century. The available data did not suffice for such an ambitious endeavour: they were mostly national data, but without long time series; and the international—especially European—data only went back to the 1960s. Therefore we decided to set up our own demographic database.

The work originated with a dataset compiled by the HIWED project. This dataset extended up to 1975 and included thirteen industrialized Western European countries: Austria, Belgium, Denmark, Finland, France, Ger-

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many, Ireland, Italy, The Netherlands, Norway, Sweden, Switzerland, and the United Kingdom. First, this dataset was checked for errors (which were numerous) and corrected. Second, it was updated from 1970–75. Demographic data available for the time periods between censuses become more and more inaccurate the longer the period of time between censuses is. Therefore the annual vital statistics data were corrected after the censuses of 1980/1, and these corrected data were used for the period after 1970. The annual time series were updated up to the early 1990s. (The same problem occurs with the vital statistics data from the 1990s, which will not be corrected before the censuses of 2000/1). Third, not only were data checked and extrapolated; in addition, new countries were added. Completely new time series were collected for Czechoslovakia, Greece, Hungary, Iceland, Luxembourg, Poland, Portugal, and Spain. Moreover, several new indicators were formulated and calculated: the illegitimacy rate, the crude legal separation rate, and the separation rate, among others. A completely new dataset was compiled for the population structure, containing for each census a table combining age in one-year age groups with sex and the marital status. Finally, we also collected completely new data on household and family statistics. This field of historical European statistics had been completely untouched thus far: there were national collections as stand-alone products (for Germany see Rothenbacher, 1997), but household and family statistics were usually only rudimentary additions to general historical-statistical works. For the first time, the main available data were compiled at the national level for the 21 countries included in this data handbook.

Given the very time-consuming task of compiling annual statistics for 21 countries covering over 100 years (the number of censuses used for data collection amounts to approximately 200), regionalizing this huge amount of variables, time series, and combinatory tables would have been impossible for only one or a few persons. This is a

lesson learned from the Princeton Fertility Project, which took more than a decade to complete and a large staff of people to collect, process, and analyse data at the regional level for the subject of fertility alone.

The data are thus far complete to such a degree that not only individual countries can be compared, but countries can also be grouped into clusters and compared with other individual countries or country clusters. The dataset allows, for example, a comparison of the Nordic crude birth rate with the Mediterranean crude birth rate. Furthermore, European rates can be and have been calculated. Europe can be delimited in various ways: it is possible to create rates for Western Europe, for Central Europe, or for Continental Europe alone. Calculating European rates allows for very instructive comparisons of national rates with the European (weighted) averages. In principle, variation coefficients can be calculated and therefore convergence and divergence analysed.

Contents

The 21 country chapters have a standard format. Each chapter consists of eleven text sections and an appendix with tables and figures. The eleven sections are (1) State Formation and Territory; (2) Regional Population Structure; (3) Population Growth; (4) The First Demographic Transition; (5) Fertility and Legitimacy; (6) Mortality and Life Expectancy; (7) Marriage and Divorce; (8) Age, Sex, and Civil Status; (9) Family and Household Structures; (10) The National System of Demographic Statistics; and (11) Boundary Changes. Section 10 is furthermore divided into three subsections, presenting information on the development of official statistics in the fields of a) population structure, b) vital statistics, and c) households and families. Each chapter concludes with a standardized appendix containing tables and figures.

Structure of Country Chapters

We will now outline the different sections of the country chapters. A short introductory section on *state formation and territory* (1) presents essential background information necessary for understanding, using, and interpreting the statistical information presented thereafter. This section describes the political history of each country in terms of state evolution, date of independence, major changes in political regimes, and essential boundary changes through secession, mergers, or territorial losses. Not only politics, but also the long-term economic development, the economic position of the country in European comparison (the 'wealth of the nation'), and important features of the economic structure are described. In addition, major features of the social structure are highlighted which may have important and explanatory influences on population and demographic developments.

The section on *regional population structure* (2) deals with the internal population distribution of a country. Two indicators are used to describe the regional population structure: the proportion of each region's population in per cent of total population, and the population density (in inhabitants per square kilometre) of each region. The hundred years from 1850 to 1950 reveal major shifts in population distribution which are known as *urbanization* and rural exodus. These data show the main settlement structures of a country and the extent to which this structure changed during modernization.

The section on *population growth* (3) deals with the long-term growth processes during the first demographic transition. The main result of the demographic transition in all European countries was enormous growth in the European population and the population of the individual nation-states. Nevertheless, this development was very different according to the conditions in each country. Not only the long-term growth processes and macro-settings are discussed, but also the impact of wars, economic crises,

and epidemics on growth rates. This section also describes major developments in net migration.

The next section describes *the first demographic transition* (4) of each country. The ‘theory’ of the demographic transition is in principle a model describing the development of societies from a state of high population turnover to a state of low population turnover. The model furthermore states that the death rate declined first and the birth rate reacted later also with a decline. The development of individual countries shows that this was not always true, and that in several countries the birth rate declined before the death rate. Nevertheless, the model is an important heuristic device for understanding this long-term process. The section describes the main features of the national process of demographic transition, each country’s pre-transition level, start and speed of transition. Explanations or interpretations of the individual characteristics of the demographic transition are given wherever possible.

The section on *fertility and legitimacy* (5) presents the data on legitimate and illegitimate fertility and on the proportion of illegitimate births to all births (the illegitimacy rate). The disaggregation of births by legitimacy and the calculation of age-standardized birth ratios by legitimacy reveals interesting and important aspects of family organization (the importance of cohabitation), illegitimacy, and attitudes towards the legal status of children. The causes of illegitimate fertility have been manifold and differ from country to country.

The section on *mortality and life expectancy* (6) presents and discusses the data on the infant mortality rate. This section is closely related to the section on the first demographic transition, because the infant mortality rate strongly influenced the crude mortality rate. Therefore, in a country where the infant mortality rate was high, the crude mortality rate was high as well. The national figures are described with reference to other European countries. The singulari-

ties of the national developments are presented and possible explanations are given. A second aspect of mortality is life expectancy which provides a much broader picture of mortality. Men and women are included and mortality is calculated also for higher age groups.

The section on *marriage and divorce* (7) deals with the marriage patterns in a country. Indicators used to describe nuptiality and marriage behaviour are the mean age at marriage, the proportion married at age 20–24, the marriage ratio, and the celibacy rate. The typical configuration of a country concerning these indicators is presented and the country’s position with reference to such typologies as the ‘European Marriage Pattern’ is discussed. This section also deals with the long-term growth of marital instability due to divorce and legal separation.

The section on *age, sex, and civil status* (8) discusses the development of the population in a more disaggregated form, looking at the development of the age structure and population changes in the marital status, all according to sex. Major developments are population ageing, which in most countries was already visible in 1900, the increase of the proportion married until the mid-1930s, the lowering of the age at marriage, and the decline in celibacy.

In the section on *family and household structures* (9) the presentation is solely based on the available official household and family statistics collected by the statistical offices. Historical studies using primary sources such as original population census sheets or early population registers are not reviewed here; nevertheless, important relevant results have been included for explanatory purposes.

The section on *the national system of demographic statistics* (10) is documentary in character. It describes the available statistics concerning the introduction of investigation, the history of data collection, and the definition of statistical concepts for the three fields of *population structure, vital statistics, and households and families*. Especially

important is the documentation of the definitions of statistical concepts, because only knowledge about the way data are collected and processed allows for a meaningful interpretation of the empirical facts. The documentation of the definition of statistical concepts is more important for household and family statistics, which were not standardized until after 1945.

The final section on *boundary changes* (11) provides information on the most important boundary changes necessary for understanding and interpreting the different population sizes and the demographic time series.

After the textual presentation there is a large section with *appendix tables and figures*, comprising six standard tables with statistical data, one documentary table, and several figures. All tables and figures included in this appendix have been standardized as far as possible. *Appendix Table 1* documents the census dates and presents for each population census the most basic statistical information: the population by sex, civil status, and three age groups (0–14, 15–64, and 64+) in absolute and relative terms. *Appendix Table 2* includes the regional population distribution for the different population censuses in relative terms. The proportion of each region in per cent of the total population has been calculated. *Appendix Table 3* presents a different kind of regional data: it gives the population density measured by the number of inhabitants per square kilometre for each region and population census. *Appendix Table 4* comprises demographic time series, if available, for the period 1850–1945. The time series are structured in the same way for all countries. They contain information on mid-year population, two different population growth rates, migration, several fertility indicators, legitimacy, and various mortality, nuptiality, and divorce measures. *Appendix Table 5* presents the development of life expectancy at various ages for both sexes. The *Appendix Tables 6A–6E* on households and families are less highly standardized due to the

varying national statistics. But, wherever possible, the tables provide information on the main household types such as one-person, family, and institutional households (absolute and per cent) together with the respective population living in these households (*Appendix Table 6A*). A second table presents the distribution of households by size in absolute terms (*Appendix Table 6B*) and a third table in per cent distribution (*Appendix Table 6C*). A fourth table gives average household sizes for different household types (*Appendix Table 6D*). A fifth table—if available—presents information on household composition (*Appendix Table 6E*). These five tables are included—if possible—as standard and are supplemented by additional tables if other interesting statistics are available. Such additional data may include disaggregation of households by socio-economic status of the household head or regional information. *Appendix Table 7* documents the availability of the individual vital statistics and population census variables. *Appendix 8* includes several standardized figures on *population by age, sex, and marital status*. These figures are based on the population censuses. The number of figures varies between countries according to the availability of population census results.

All sources and references have been combined in one *bibliography* at the end of the volume. This bibliography has two main sections: *sources* and *references*. Sources are all statistical titles that have actually been used for this data handbook, while references are all the literature cited in the texts. The references have been arranged in alphabetical order. The sources have been subdivided, first into sources used in the comparative *Introduction*, and then into sources used for each of the 21 countries. For each country the sources have been further divided into three sections: (1) sources on *vital statistics*, (2) sources on *population structure by age, sex, and marital status*, and (3) sources on *population census results on households and families*.

Data Presented

This data handbook presents the population, demographic, and household data, collected in a standardized and systematic way for the 21 countries of Western and Central Europe whenever possible from 1850 to 1945. Several general guidelines have shaped the work from the beginning:

1. *Territorially aggregated data*: results have been collected at the level of the nation-states only, and regional data have only been collected for population size and population density.
2. *Complete census coverage*: all the population censuses in the time period have been covered, amounting to nearly 200 individual censuses in the 21 countries.
3. *Disaggregated data collection*: while there was no regional disaggregation, in other respects the data have been collected with as much detail as possible on a disaggregated level. Thus, vital statistics have been collected on an annual basis and have not been aggregated into time periods (quinquennia or decennia). Furthermore, the data on age, sex, and marital status have been collected in the most disaggregated way possible. Whenever available, one-year age groups have been chosen, and all the different types and combinations of the marital status are included (there are more detailed types of marital status in some countries than the usual four types, single, married, widowed, and divorced).
4. *Historical perspective*: for all countries the collection starts in the nineteenth century, for some already in the eighteenth. The series are documented from 1850 in this data handbook. Nevertheless, in some cases the data collection reaches much further back into history.

Selected Comparative and National Results

Population Structure and Density

Population density continues to differ greatly by geographic and geo-economic position of the European countries. Already since the Middle Ages the corridor from southern England via The Netherlands and Belgium down the Rhine Valley through Switzerland to Northern Italy was the most economically developed and most densely populated region of Europe. This remained the case in the nineteenth century and was even enhanced by the population revolution; external and internal migration processes added to it. Therefore, there is a supranational system of population distribution in Europe. Thus, the *centre of population gravity* in Europe since the sixteenth century has shifted to continental Europe north of the Alps.

It can even be said that since the decline of the Roman Empire, in a very long-term perspective, the centre of gravity of the European population shifted from the Mediterranean to north of the Alps. But this was only a gradual movement, and until the high Middle Ages, Italy for example was one of the most densely populated countries. Furthermore, the largest cities, such as Constantinople, Venice, and Genoa, were located on the Mediterranean. From the high Middle Ages to the sixteenth century there was a further shift from the Mediterranean to northern Europe, caused by the rise of the Ottomans and the loss of North Africa, parts of Spain and Portugal, and finally of most of the Balkans to the Muslims. As a result, the Mediterranean region was split between cultures; the trading routes were threatened by the resulting instability and increasingly shifted away from the Mediterranean region to overseas, resulting in the decline of Mediterranean trade and of such trading powers as Venice and Genoa. The major discoveries of new territory in the fifteenth and sixteenth centuries by the Portuguese, Spanish, Dutch, and British finally moved the economic and

population centre to continental Europe.

Starting in the sixteenth century the Southern European powers Portugal and Spain suffered from an economic decline which became very apparent in the seventeenth century, when the powers of the North, mainly the Dutch and the British, became dominant. The South declined not only in terms of economic and military power, but also in terms of population (Pounds, 1979; Catalan, 1995), as can be seen from the number of inhabitants of the European countries. Germany, although not a seapower, had the largest population in 1870 with 41 million. France came second with 35 million; population growth in France had already been low since the late eighteenth century and continued during the nineteenth. The United Kingdom came third with 28 million inhabitants. Population growth in the British Isles and Ireland was quite vigorous, and the population of the United Kingdom exceeded that of France in the decade 1900–10; by 1930 the UK had six million more inhabitants than France. Italy ranked fourth in population with 27 million in 1870. Population growth was higher than in France, but far lower than in the United Kingdom. In 1930 Italy's population was equal to that of France. While France's population

increased by only six million inhabitants, Italy's population went up by 14 million. Spain's population ranked fifth in 1880 with 17 million inhabitants, but population growth was quite strong until the 1930s, with an increase of approximately seven million people. Most other European countries were small or medium-sized in terms of absolute population, though some showed strong growth. Population growth was highest in The Netherlands: 'only' 3.6 million in 1870, the population doubled in the decade 1920–30. Further strong increases occurred in the Nordic countries, especially in Denmark, Finland, and Iceland.

There is no relationship between the size of a country in terms of territory and the size of its population: a large territory does not automatically lead to a large population and vice versa. When the different territorial sizes of the European countries (in square kilometres) are compared, France is the largest, followed in rank order by Germany, Spain, Sweden, Poland, Finland, Italy, Norway, and the United Kingdom. This list shows that the countries with the highest population growth are often those with small territories and that there is only little correlation between population size and size of the territory.

Population density of the European countries is given in *Table 1*. Population density is defined as inhabitants per square kilometre. In 1870 the most densely populated European country was Belgium with 164 inhabitants per sq. km. The United Kingdom was second, followed by The Netherlands, Italy, France, and Germany. This picture changed only gradually up to 1930: Belgium remained the most densely populated country with 265 inhabitants per sq. km., while The Netherlands moved into second place due to their strong population growth. The United Kingdom fell to third place, followed in order by Germany, Italy, and Luxemburg.

Population Growth

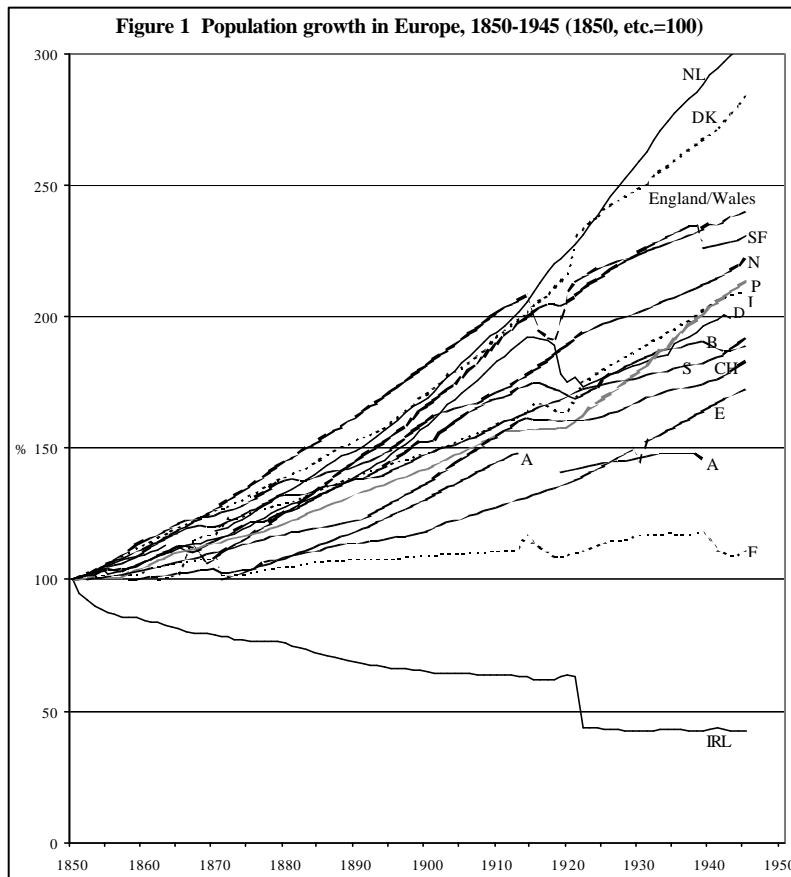
Population growth is made up of three variables: the number of births, the number of deaths, and the extent of migration, i.e. of net migration. There are very different possibilities of combination (leaving migration aside for the moment): high fertility can go along with high mortality, resulting in medium natural population growth. High fertility can also occur with low mortality; in this case the natural population growth would be highest. Low fertility can be combined with low mortality, in which case natural population growth would also be medium. Finally, low fertility can be combined with high mortality, in which case natural population growth would be lowest.

To these four different combinations can be added the element of net migration (the difference between immigration and emigration) which can be high or low. Thus, a country with high natural population growth could have high net migration, reducing the overall population growth substantially. By contrast, a country with low natural population growth could have low net migration, with a similar effect for overall population growth.

Table 1 Population Density in Europe (inhabitants per sq. km.)

Country	1850	1860	1870	1880	1890	1900	1910	1920	1930	1940
Austria	–	–	67	74	80	87	95	78	81	83
Belgium	147	154	164	187	206	227	252	251	265	279
Czechoslovakia	–	–	–	–	–	–	–	96	105	96
Denmark	–	–	47	51	57	64	71	76	83	90
Finland	–	–	5	6	7	8	9	10	11	11
France	–	–	67	71	73	73	74	73	78	75
Germany	–	–	76	84	91	104	120	133	140	–
Greece	–	–	29	–	–	–	–	–	48	–
Hungary	–	–	47	49	54	59	64	86	93	100
Iceland	–	–	–	–	–	1	1	1	1	1
Ireland/Irish Republic	–	–	66	63	58	55	54	43	43	43
Italy	–	–	90	96	–	113	125	125	133	137
Luxemburg	75	–	79	81	82	91	100	101	116	115
The Netherlands	–	–	109	122	137	154	180	211	244	298
Norway	–	–	–	6	6	7	8	9	9	10
Poland	–	–	–	–	–	–	–	70	83	–
Portugal	–	–	–	49	55	59	62	66	74	85
Spain	–	–	–	33	35	37	39	42	47	51
Sweden	–	–	10	11	12	12	13	14	15	16
Switzerland	–	–	64	68	71	80	91	94	98	103
United Kingdom	–	–	121	137	152	169	185	188	197	–

Note: The exact dates of the population censuses which often deviate from the years given above, have been left out due to simplicity.



It is not possible to determine *a priori* whether these three variables are high or low in a given country, as it depends on many factors related to the social, economic, and value (religious) structure of the population. The birth rate in pre-industrial agrarian countries, for example, depends very much on the type of agricultural organization and the system of inheritance. The death rate depends heavily on the amount of infant mortality, which again depends on factors related to the educational level of the population, development of medicine, and sanitary infrastructure. Migration, finally, also depends on a variety of factors, such as the legal possibility to immigrate or emigrate, the population pressure due to overpopulation, expulsion of parts of the population due to political or religious conflicts (Huguenots, Puritans, Waldensians). Of all these, relative overpopulation (or relative underpopulation in countries receiving immigrants) is probably the most important factor causing migration.

Population growth could furthermore depend on the population

density in a country at the start of the demographic transition. It might be postulated that the higher the population density in a country at the pre-transition stage, the lower the population growth during the first demographic transition. The underlying supposition would be that high population density will cause people to limit reproduction due to the difficulties arising from high settlement density.

Figure 1 presents population growth rates from annual mid-year population figures based on the year 1850 (or 1871, 1919, etc.). The five countries with the highest population growth during the period 1850–1945 are Greece, The Netherlands, Denmark, England and Wales, and Finland. But Greece has to be removed from this list, because of its large territorial gains since independence. The five countries with the lowest population growth (in declining order) are Spain, Switzerland, Luxemburg, France, and Ireland. Ireland is the only European country in which population declined absolutely from 1850 to 1945, mainly caused by emigration.

These patterns obviously do not confirm the above hypothesis that population growth will be low in countries that had a low population density already before the start of the first demographic transition. As early as 1870 The Netherlands and the United Kingdom had among the highest population densities in Europe. Nevertheless, Denmark and Finland, which are in the top-five group with the highest population growth, had a remarkably low population density in 1870. Let us now look at the country group with the lowest population growth: these countries by no means belong to the group with a high population density in 1870. In France, Luxemburg, and Switzerland, population density was on a medium level, while Spain's population density was low.

Mere number of people per square kilometre therefore does not explain population developments. Rather, there must have been different 'population regimes' (*Bevölkerungsweisen*, Gerhard Mackenroth) in European countries. These different population regimes are probably strongly related to the different European marriage patterns, to the unequal economic structure in Europe, leading to early industrialization in one country and persistence of agriculture in another, and to the type of agricultural organization in the countries still strongly dominated by agriculture until the mid-twentieth century.

The differing population growth of course had enormous consequences for the territorial population pattern in Europe. Looking at the population of individual European countries as a proportion of the overall European population of that time, we see that the population of some countries increased relative to the total European population, while that of others decreased. Countries whose population shares increased are The Netherlands, Denmark, Finland, Greece, and the United Kingdom. Countries with severe relative losses are mainly France and Ireland, and to some degree Spain.

Mortality and Life Expectancy in Europe

The model of the first demographic transition states that the mortality decline is the decisive factor for the fertility decline, because people reduced their fertility according to their children's improved chances of survival (Schofield, Reher, and Bideau, 1991). No matter which declined first in the demographic transition, mortality or fertility, the long-term trend in mortality is similar to that of fertility. The general trend is a decline in mortality at least since the 1880s, with some national variation. There were pioneering countries, in which mortality declined some decades earlier, as well as laggards, in which mortality fell later than the average. Until the

graphical characteristics, country size, and religion.

This surprising progress in mortality reduction cannot be interpreted in the sense that adult people lived much longer than before. Instead, the mortality decline during the first demographic transition was mainly a decline in infant mortality. The greatest progress was made in combating deaths in early childhood, mainly during the first five years, primarily due to the introduction of vaccinations (the first one was for smallpox shortly after 1800), sanitation, and breastfeeding, among others (Table 2). The first stage in the so-called epidemiological transition was therefore the fight against early childhood diseases. The second-most dangerous phase of human

1940s; the major decreases in mortality of the elderly were achieved after 1945 and mainly since the 1970s.

Marriage Patterns in Europe

In 1965, John Hajnal distinguished between the 'European Marriage Pattern' and the 'Non-European Marriage Pattern' (Hajnal, 1965), with the dividing line between the two running from St. Petersburg to Trieste. This model claims to be valid for the time period until roughly 1940. The European marriage pattern is defined by a high age at first marriage, low nuptiality, and a large share of people remaining single for life. By contrast, the non-European marriage pattern is defined by a low age at first marriage, high nuptiality, and a small share of the population remaining single. According to this definition, the whole of Eastern and south-eastern Europe belongs to the non-European marriage pattern. Hajnal's data refer to the time period until roughly 1900; in the subsequent time period, Hajnal concedes modernization processes on both sides: the non-European marriage pattern becoming more like the European marriage pattern and the European more like the non-European marriage pattern. The question here is whether this hypothetical convergence of marriage patterns for the time after 1900 can really be proved (see Rothenbacher, 1998).

Table 2 Infant Mortality Rate in Europe (deaths under 1 year of age in a given year per 1,000 live births of that year)

Country	1850	1860	1870	1880	1890	1900	1910	1920	1930	1940
Austrian Republic	–	–	269.9 ^a	236.6	247.3	211.6	184.0	156.8	104.1	74.2
Belgium	140.8	138.7	145.4	186.5	166.4	171.6	134.0	110.2	99.5	93.2
Czechoslovakia	–	–	–	–	–	–	–	174.1	134.5	98.8
Denmark	–	135.6	130.9	150.8	132.7	128.5	102.2	90.7	80.0	56.2
Finland	–	–	136.6	166.9	141.7	153.1	117.7	96.7	75.1	88.3
France	147.0	152.7	201.4	180.1	176.1	160.8	110.5	99.2	78.1	90.5
Germany	–	–	–	–	–	206.8 ^b	161.8	131.1	84.6	59.8 ^c
Greece	–	–	–	–	–	–	–	–	133.8 ^d	118.2 ^e
Hungarian Rep.	–	–	–	–	272.1 ^f	225.1	196.1	192.5	152.5	130.1
Iceland	242.1	325.9	198.1	169.8	238.9	127.4	105.5	83.4	45.2	35.9
Ireland/Irish Rep.	–	–	95	112	95	109	95	83	68.0	66.4
Italy	–	231.6 ^g	230.2	225.0	198.3	174.1	140.0	126.7	105.5	102.7
Luxemburg	–	–	–	–	–	140.1 ^h	144.4	96.6	90.5	65.9
The Netherlands	–	–	–	217.6	171.4	155.2	107.9	72.8	50.9	39.1
Norway	102.0	102.0	100.7	95.3	97.2	90.4	67.2	57.5	45.6	38.7
Poland	–	–	–	–	–	–	–	–	142.7	14.0 ⁱ
Portugal	–	–	–	–	–	–	133.9	164.1	143.6	126.1
Spain	170.9	211.6	–	–	–	185.9 ^j	149.3	164.3	117.1	108.7
Sweden	146.2	123.8	131.9	120.7	103.1	98.5	75.1	63.3	54.7	39.2
Switzerland	–	–	–	179.9	156.9	149.7	105.0	83.7	50.8	46.2
United Kingdom	–	–	–	–	–	–	–	–	63.1	61.0
England and Wales	145.6	147.6	159.7	152.8	151	154	105.4	83.9	60.0	57.4

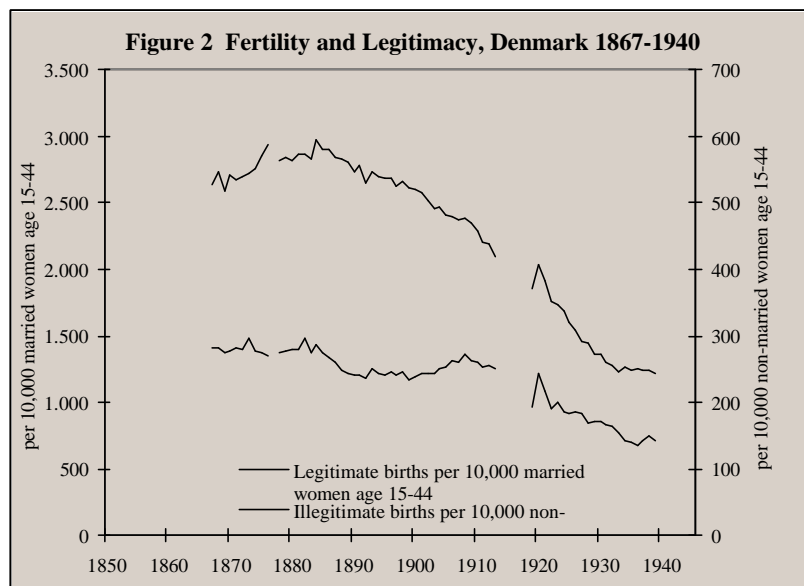
Notes: ^a 1871; ^b 1901; ^c 1938; ^d 1931; ^e 1939; ^f 1891; ^g 1863; ^h 1901; ⁱ 1938; ^j 1901.

1940s there was a clear convergence in the crude mortality rate: mortality in those countries with high mortality around 1890/1900 declined faster than in countries where mortality was already low at that time. Already in the 1840s the national differences in the mortality rate had become fairly small. Nevertheless, the structure between countries remained very stable, thus reflecting rather invariable characteristics of European societies, such as geo-

life was young adulthood, which was mainly threatened by tuberculosis. Whereas much progress in reducing childhood infectious diseases was already made during the nineteenth century, the fight against tuberculosis began to be won only in the first half of the twentieth century. In the nineteenth century, if people reached age 60 they had a good chance of living to age 70 or more. Mortality reduction for the elderly was rather small until the

From Universalization of Marriage to Deinstitutionalization

Until the end of the nineteenth century, in many countries access to marriage was restricted to persons having a certain amount of assets. This regulation did not originate in the *ancien régime*, but was introduced in the first half of the nineteenth century to avoid the pauperization of broad segments of the



population. The towns in particular feared the burdens of providing communal care for the aged and the sick caused by the growing population exceeding the positions available in the labour market. Marriage was often the precondition for access to political rights, such as the communal right to vote, and thus was highly valued. Access to marriage was restricted particularly in the southern German states until 1867, whereas Prussia was more liberal in this respect (Matz, 1980). Marriage restrictions were removed in the territory of the Federation of Northern Germany (*Norddeutscher Bund*) with the federal treaty (*Bundesordnung*) of 1867 and for the whole of Germany in 1871. After that it was no longer necessary to have a certain income in order to marry. Marriage restrictions were also found in some other continental countries such as Switzerland. In general, the legal barriers to marriage were removed only in the last third of the nineteenth century. In all German states and in many European countries, there was a slight increase in the marriage rate in the 1870s. After the legal barriers to marriage had been removed, social and economic barriers increasingly came to the forefront. Economic and social developments, such as the spread of female employment, the increase in educational participation, the growth of employment in the public sector, and longer time spent in education, were new checks on

the freedom to marry. These factors could be significant for the stagnating or declining nuptiality in Western Europe up to 1914.

The general trend in all European countries over the last 150 years is thus the universalization of the right to marry for all population groups and a declining interest of the state in marriage law. The law still regulates the age at marriage and the sex of the marriage partners and bars incestuous and polygamous marriages (Glendon, 1989: 38ff.). In a long-term perspective, the importance of bourgeois marriage as a model of familial behaviour increased after 1850. Thus, the general tendency can be called universalization of marriage regardless of social status and income position.

Since the 1960s a trend in the opposite direction has appeared, in family sociology called the 'deinstitutionalization of marriage and family' (Kaufmann, 1990; see also Meyer, 1993). Based on the sociological tradition of institutional analysis, it is claimed that the 'bourgeois' (or middle-class) family as a highly institutionalized model was valid until the 1960s, and that since then a reversal of this model has occurred. Institutionalization of marriage as a long-term process should therefore mean the societal acceptance of the model of the 'bourgeois' family, understood as the Parsonian normal family consisting of parents and two children.

This problem can be dealt with under different aspects: first, the legal aspect of family and marriage law which create explicit norms. One may ask whether in this domain there are important processes of institutionalization and subsequently processes of deinstitutionalization. Second, the question concerning social structural changes has to be raised, exerting possible effects on these processes. Third, a society cannot be seen as a homogeneous block, but must be analysed as a stratified system with class-specific family and related social behaviour.

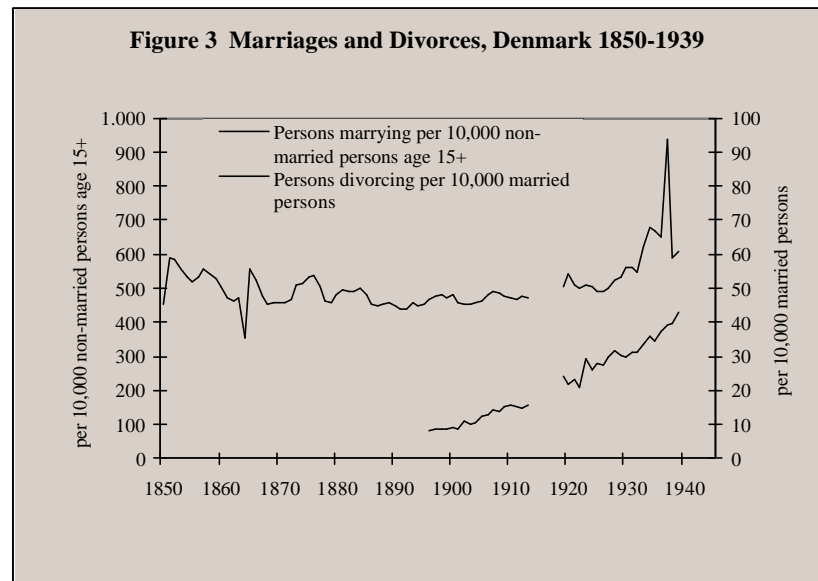
Marriage and Legitimacy

According to Goody (1983), in a long-term perspective the conjugal family as it exists today—with the monopoly on reproduction—is a product of Christianity, fighting for centuries against non-marital and extra-marital relationships and thus creating the problem of illegitimacy (Figure 2). A perspective orientated much more in economic history argues that illegitimacy is heavily bound to the respective mode of production. Thus, surprisingly, one of the highest proportions of illegitimacy in history was found in Catholic countries (Bavaria, Austria). The influence of the Church as monocausal factor is therefore not a sufficient explanation. In agricultural societies the extent of illegitimacy was, among other things, also dependent on the regulations of agriculture. Illegitimacy was fairly high in regions with single farms and inheritance by the principal heir; the structure of the agrarian economy in latifundia or family economies may also have played a role. Other factors, especially since the nineteenth century, are liberalization and the growth of lower strata in the process of industrialization. Another chain of argumentation could be that the extent of illegitimacy mainly depends on other demographic factors. Thus, the lower the age at marriage and/or the proportion of persons married, the lower the share of illegitimate births. Another important factor is probably the legal status of the illegitimate child, which differed greatly from country to country. In

some German regions with inheritance law of the principle heir and in Austria, premarital, non-marital and extra-marital children were highly welcome as labourers and proof of fertility, explaining the very high rates in these regions (Mitterauer and Sieder, 1982; Mitterauer, 1983).

Growth of Divorces and Liberalization of Divorce Law

The dissolution of marriage was not possible until the beginning of the nineteenth century, when it was only possible in some cases, if at all (Figure 3). The grounds for divorce were very limited. Between 1920 and 1965 there were no fundamental changes in divorce legislation, in contrast to the development in divorce rates. Exceptions can be seen in a longer list of grounds for divorce in England (1937) and the divorce legislation of the National Socialists in Germany and Austria (1938). Northern European divorce law is characterized by its flexibility. In Scandinavia there is a wide range of grounds for divorce and it is possible to get a divorce after a certain phase of marital separation, indicating the existence of the principle of breakdown of a marriage and divorce by mutual consent. In the United Kingdom flexibility is provided by the common-law system, based on case law and the principle of legal precedent, which gives the judge greater autonomy in deciding. In other parts of Europe divorce law is bound much more by legal regulation. The countries with law based on the Napoleonic Code—France, Belgium, Luxembourg, and The Netherlands—can be distinguished from Germany and Austria, with the German law tradition based on the civil code (*Bürgerliches Gesetzbuch* (BGB)); the BGB also exerts its influence on Swiss divorce legislation. The Code Napoléon was in principle valid until the 1970s. Divorce legislation based on the BGB was not as liberal as that based on the Code Napoléon. The BGB allowed for divorce only in case of violation of marital duties, and divorce by mutual consent was accepted only in a few cases.



Population Ageing

Using Figure 4, some trends in age and sex structure, fertility, nuptiality, celibacy and life expectancy are discussed, taking Denmark as an example. The direction of the tendencies revealed by the Danish case is similar for most European countries, although level and speed of differ by country. Figure 4 reveals interesting developments in the age structure of the Danish population combined with sex and the marital status over 80 years, covering the period from 1860–1940. In 1860 the age pyramid still shows the pretransitional pattern of a population with nonexistent birth control. The age structure is concave with very large proportions of the age group 0–4 and 5–9. The cohorts of young adults in their twenties were comparatively small when compared with the age groups of the 35–39 year olds. Possibly during the 1820s there was an increase in the birth rate after the end of the Napoleonic wars and the hunger crisis of 1816. A very large proportion remained unmarried for a long time in their lives and age at marriage was rather high. People only started to marry during their twenties and thirties. In 1860 men married later than women. In the higher age groups, widowhood became an essential social status for women. There were much fewer widowed men due to lower life expectancy and therefore smaller cohorts and therefore higher

chances to remarry when a man became a widower.

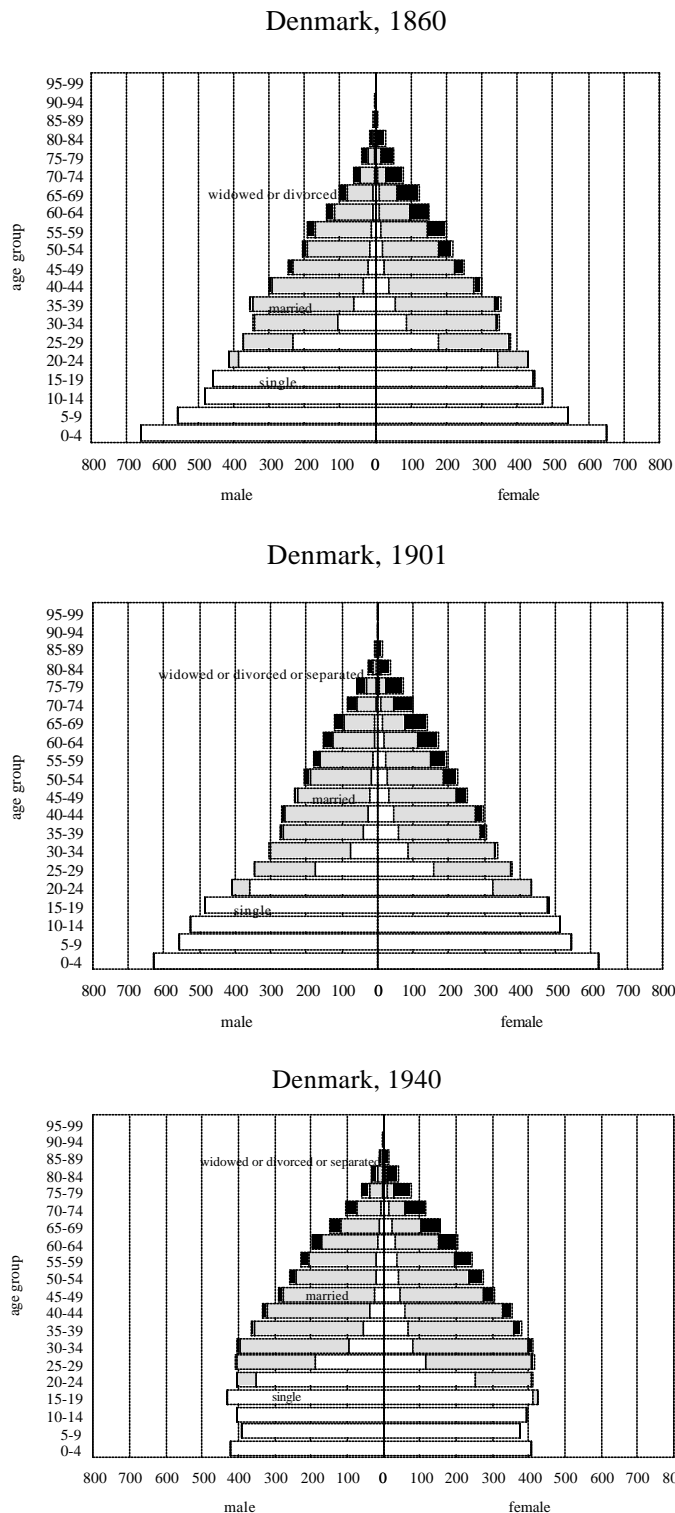
During the forty years from 1860 until 1901 this structure changed only little. Nevertheless, first signs of the starting fertility decline can be detected. The concave pattern of the age pyramid became more linear, i.e. the youngest age groups (0–4 and 5–9) declined in size due to the spread of birth control. Age at marriage was lowered and the proportions of never-married persons had declined. The effect of both was an increased proportion of the population married.

During the next forty years, until 1940, the picture changed dramatically. The age pyramid now took on to a convex shape: the birth decline since around 1900 reduced the proportion of people under 20 years of age considerably. The cohorts of the 0–4 year olds was as large as the one of the 15–19 year olds. Age at marriage had declined further and the proportion of people married had increased. In addition, there was already a slight improvement in life expectancy for persons of very high age, e.g. for persons over 80 years old. Far more women than men now remained single for a longer time. The proportions of women never married were now higher than in 1901.

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Figure 4 Population by Age, Sex and Marital Status, Denmark 1860, 1901 and 1940 (per 10.000 of total population)



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Christian Berger

European Research Centre on Migration and Ethnic Relations (ERCOMER), Utrecht

The ERCOMER, a research institute based at the Faculty of Social Sciences, Utrecht University, the Netherlands, is committed to comparative studies on international migration and ethnic relations. Research projects in these fields are mainly carried out with a focus on European countries. Apart from research, the institute is engaged in the publication of the joint book series 'Research in Migration and Ethnic Relations', publishes a monograph series and created 'The WWW Virtual Library on Migration and Ethnic Relations'. Only recently, the institute started an online information system on migration and ethnic relations.

History

Experience has shown that 'research institutes seldom appear overnight' (ERCOMER. *Report on the first three years 1994–1996. Preface*, 1997). The ERCOMER is no exception to this 'rule'.

At Utrecht University, the largest of the 13 Dutch universities in terms of the number of staff and the budget and the second largest as far as the number of students is concerned, 'the existing team [...] seemed to have an unusual potential for building a new-style research centre' in the early 1990s (ERCOMER. *Report. Director's introduction*, 1997: 1). Malcolm Cross, the first Director of the institute, also emphasized that the 'sizeable group already containing a mixture of leading names and new talent [...] was multidisciplinary and multinational' (ibid). Against this background, the University of Utrecht granted resources for three years to develop the idea of a European research centre on January 1, 1994 (ERCOMER. *Report. Preface*, 1997). Moreover, a 'contract with the European Commission for a programme of Human Capital and Mobility Fellows' was signed in the same year (ibid.).

Cross regards the Netherlands as an ideal location for the ERCOMER:

- 'Post-war migration has been as significant as in any other European country and it has broadly been divided into a 'colonial' and 'gastarbeiter' variant.
- The Dutch pioneered pluralism, seeing in new cultural forms

further pillars to their twin religious traditions.

- Above all, trading relations, small size and physical location near the European centre of gravity combine to make the Netherlands an easy place to extoll the virtues of comparative social sciences.'

(ERCOMER. *Report. Director's introduction*, 1997: 1–2).

But why were both migration and ethnic relations chosen as objects of research? Cross explains this by referring to the phenomenon that 'the rise of ethno-nationalist movements often produces conflicts which generate migration and flight' (ERCOMER. *Report. Director's introduction*, 1997: 2). Additionally, this connection allowed a consideration of 'the consequences of increased population mobility' and 'added a dynamic perspective to the study of minority-majority relations' (ibid.).

Research Agenda

The ERCOMER hopes for intriguing insights from comparative and interdisciplinary research in six fields:

- Racism, ethnic conflict and nationalism in Western and Eastern Europe;
- migration and asylum in Europe;
- migrants and minorities in European cities;
- comparative studies in multi-cultural education;

- migration, health and social integration;
- the governance of multi-ethnic states.

(Cf. ERCOMER. *Report*. 1997: 5–11).

Within these six fields, there are 32 running research projects (Cf. <http://www.ercomer.org/staff/index.html>. Latest update: July 19, 2000). 25 scientists are currently working at the ERCOMER. Han Entzinger, professor of the Department of General Social Sciences at the Faculty of Social Sciences, Utrecht University, is the present Chair and Academic Director of the institute.

Results of research are published in journals, in the joint book series 'Research in Migration and Ethnic Relations'—a project of the Danish Centre for Migration and Ethnic Studies, South Jutland University Centre (DAMES), the Centre for Research in Ethnic Relations, University of Warwick (CRER) and the ERCOMER—or in the ERCOMER Monograph Series (dissertations and monographs). Moreover, some members of the ERCOMER publish their results of research independent of the institute.

In the joint book series, the volume on 'European Nations and Nationalism. Theoretical and Historical Perspectives', published in 2000, contains studies of 15 Western, Central and Eastern European countries: the Russian Federation, Ukraine, Romania, Hungary, Slovakia, the Czech Republic, Poland, Germany, Sweden, the Netherlands, Belgium, Britain, France, Spain and Italy. In their introductory analysis, Louk Hagendoorn and José Pepels from the ERCOMER provide a theoretical approach to nationalism. According to them, the intensity of nationalism varies between a 'mild' version which is 'patriotic and in-group oriented' and the 'hottest' version which is 'aggressive, derogative toward out-groups, and aims to dominate' (24).

The decisive role of a nationalistic elite in activating an 'echo effect' is emphasized in this approach (21). Once awakened by an elite, nation-

alism will 'swing around' in the form of a 'triangle': 'from a national majority, to a national minority, to a neighbouring motherland, and so on' (20; with reference to Rogers Brubaker's 'triangle concept' (publ. 1996): *Nationalism Reframed. Nationhood and the National Question in the New Europe*. Cambridge, UK: Cambridge UP).

Hagendoorn and Pepels refer to Karen Phalet and Edwin Poppe from the ERCOMER who 'found the two general dimensions underlying national and ethnic stereotypes that can be used when nationalistic elites want to evoke feelings of threat. These are competence (or incompetence) and morality (or immorality) which are attributed to outgroups [...] (21; Phalet, Karen, and Edwin Poppe (1996). *Competence and Morality Dimensions of National and Ethnic Stereotypes. A Study in Six Eastern European Countries*. Utrecht: ERCOMER, unpublished paper).

In 'European Nations and Nationalism', data on migration, elections and attitudes towards the mother country and foreign countries are presented. The volume may serve as a reference guide for students and scholars.

The WWW Virtual Library on Migration and Ethnic Relations

The 'World-Wide Web Virtual Library on Migration and Ethnic Relations' is a collection of links to major Internet resources in the field of migration and ethnic relations: research centers, journals and newsletters, conferences and meetings, data archives, documentation centers and NGOs etc. are listed. It was established by the ERCOMER on September 7, 1995, as a part of the 'WWW Virtual Library' that comprises many other subjects. ERCOMER's contribution is available on the Internet site <http://www.ercomer.org/wwwvl/index.html>

The European Current Research Information System on Migration and Ethnic Relations (ERIS-MER)

This information system is still in its infancy. If finally established, it ought to provide 'information on research projects from their inception to their completion, but will also incorporate additional information: on participating persons and their expertise, on the [...] organisations, on the results, events, research funding sources related to the research etc.' (http://www.ercomer.org/research/ReSchools/Re_plans.html). The ERCOMER hopes that 'the system will result in improved scientific communication and increased public awareness of the research in the area of 'Migration and Ethnic Relations'' (ibid.).

Publications

Joint Book Series: 'Research in Migration and Ethnic Relations'

Hagendoorn, Louk, et al., eds. (2000). *European Nations and Nationalism. Theoretical and Historical Perspectives*. Aldershot: Ashgate Publishing Limited.

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Hagendoorn, Louk, and Shervin Nekuee, eds. (1999). *Education and Racism. A Cross National Survey of Positive Effects of Education on Ethnic Tolerance*. Aldershot: Ashgate Publishing Limited.

(only ERCOMER publications in the series are listed above)

ERCOMER Monograph Series

Verkuyten, Maykel, and Jochem Thijs (2000). *Leren (en) Warderen. Discriminatie, Zelfbeeld, Relaties en Leerprestaties in 'Witte' en 'Zwarte' Basisscholen*. Amsterdam: Thela Thesis.

(the only available monograph title in July 2000)

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Poppe, Edwin (1999). *National and Ethnic Stereotypes in Central and Eastern Europe. A Study among Adolescents in Six Countries*. Amsterdam: Thela Thesis.

(dissertations published within the ERCOMER Monograph Series)

ERCOMER former Book Series: 'Comparative Studies in Migration and Ethnic Relations'

Martiniello, Marco, ed. (1998). *Multicultural Policies and the State. A Comparison of two European Societies*. Utrecht: ERCOMER.

Kempen, Ronald van, ed. (1997). *Turks in European Cities. Housing and Urban Segregation*. Utrecht: ERCOMER.

Muus, Philip, ed. (1997). *Exclusion and Inclusion of Refugees in Contemporary Europe*. Utrecht: ERCOMER.

Benda-Beckman, Keebet von, and Maykel Verkuyten, eds. (1995). *Nationalism, Ethnicity and Cultural Identity in Europe*. Utrecht: ERCOMER.

(only available titles (in July 2000) are listed above)

Recent and Selected Works Written by Members of the ERCOMER not Published within any Book Series

Dekker, Henk, and Robert Aspeslagh (1999). *Ein besonderes Verhältnis. Deutschland und die Niederlande*. Baden-Baden: Nomos.

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European Directory of Migrant and Ethnic Minority Organisations

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Mathias Maucher

What Can We Learn about Social Welfare Institutions by Analyzing 'The Cost of Social Security'? The Case of Portugal

This article has a double purpose. On the one hand, it intends to report on an ongoing joint EURODATA/ILO project which aims at building up a data infrastructure on 'The Cost of Social Security' (COSS), an ILO survey on financial transactions of social security institutions. A first evaluation of the progress made will focus on the extent to which the database has already been implemented. On the other hand, this contribution seeks to screen the options for an institution-oriented welfare state research based on COSS, using Portugal as a sample case for analyses of the distribution of expenditure by functions or institutions. First results are embedded in a general description of the main lines of development of the Portuguese system of social protection and its configuration for three main periods. The text concludes on an evaluation of the way and the accuracy with which these institutions are statistically reported on by COSS.

Brief presentation of COSS

The feature in the previous edition of the EURODATA Newsletter outlined the concept for building up a machine-readable version of ILO's cross-country inquiry into the financial transactions of schemes, funds, agencies and programmes of social protection, 'The Cost of Social Security', covering the period 1949–1993 (cf. Maucher 1999). It has been carried out in the form of a questionnaire-based survey. As a rule, the responses are given by the national ministries in charge of social security. In several cases, however, the task of completing the tables has been assigned to the national statistical offices.

In accordance with the inquiry's concept, inspired by a combined functional and institutional approach, all social protection schemes and welfare provisions meeting three conditions are to be included: The individual schemes should either maintain or grant incomes or provide medical care by giving individual rights to or by imposing specified obligations on a public, semi-public or autonomous body and should also be administered by such agencies. The inquiry's focus is on nine contingencies for eleven types of social welfare institutions (cf. Maucher 1999, Graph 2). Except for two amendments, the categories of expenditure and receipts have remained unchanged since 1949 (cf. Maucher 1999, Table 1).

News from an ongoing project

Within the last few months substantial progress has been made with regard to data entry and processing. In the case of Germany, France, Portugal and Spain, the documentation of sources, datasets and institutions has been terminated. For other countries such as Belgium, Czechoslovakia, Finland, Ireland, the Netherlands and Norway, this task has mainly or partly been accomplished. As for the core part of the database, its contents and components, i.e. the datasets containing both the original documentation and the basic tables as well as the documentation apparatus (cf. Maucher 1999, Graph 4), only minor adaptations had to be made. The same holds for the database structure. Of both dimensions, especially the segment reporting on institutional stability and change needed a redesign. A user interested in analyzing the development of amount and/or structure of expenditure and receipts over a longer span of time is now enabled to retrace schemes, funds, agencies or programmes. The database will store information on the period of time those institutions have been integrated into the inquiry, the name of the schemes they have been integrated into or split off from, either in real, administrative terms or in their representation by COSS, as well as references to institutions preceding or succeeding the considered scheme, fund, agency or programme. Figure 2 provides two illustrations. It is only from 1958 on

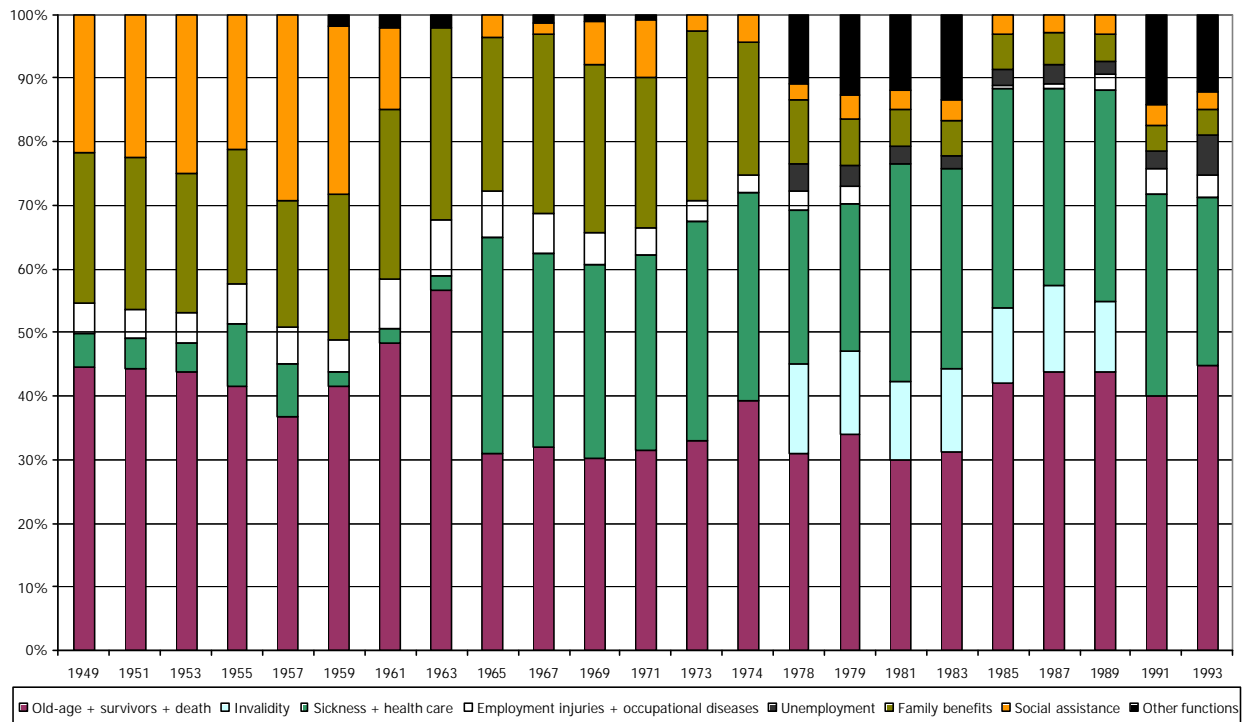
that 'Social insurance' and 'Voluntary social insurance'—i.e. mutual benefit societies—are reported on separately. Both sectors, however, always have formed sectors apart from each other, working on independent administrative structures. In 1979, formerly institutionally fragmented medical and social services were integrated into a National Health Service and consequently can be labelled as 'succeeding institution' to 'Health Services' (cf. Figures 3 and 4). Additionally, the corresponding institution(s) in the basic tables can be looked up for each institution contained in the original documentation (cf. Maucher 1999, Table 3).

A new technical solution for giving future users access to data and the meta information on countries, inquiries, datasets and institutions has been investigated and already realized to a large extent. We now intend to provide a browser-based online access on the database, from the project's final phase onwards, i.e. by the end of 2001. A test version, containing at least selected datasets as well as the complete documentation for Germany, France and Portugal, will probably be launched as early as the end of this year (please visit the project's homepage, <http://www.mzes.uni-mannheim.de/eurodata/coss/main.htm> for updated information).

The Portuguese System of Social Protection

The description of organizational structures, the personal scope of social protection schemes and the central benefits provided by them will focus on social insurance. This paragraph should illustrate structure and contents of the country chapters planned in the data handbook 'European Social Security Systems since 1945' to be produced within the series 'The Societies of Europe'. Social services (*acção social*), especially for the health and family function, are only treated to the extent necessary for the evaluation of the statistical information made available by COSS, showing gaps regarding the inclusion and irregularities in terms of the functional attribution of social assistance

Figure 1: Distribution of Expenditure for Social Protection by Function, 1949-1993



benefits, especially for hospital care. A statute of social assistance (*Estaduto da Assistência Social*), voted by Parliament as Law No. 1998 of 15.05.1944, for the first time systemized the main regulations for this function. The basic piece of legislation still in force dates from 1971. Applying a modernized terminology, Decree-law No. 413/71 of 27.09.1971 shifted the emphasis to clients' participation in the production of benefits for persons with specific needs, deficiencies or disadvantages, preventive action, and the development of local structures of welfare provision (Maia 1985: 24ff). It encouraged a closer coordination of public and private assistance and aimed at strengthening a complementary role to social insurance for all, means- or income-tested public social assistance services (*assistência social pública*) (Ahrens 1998: 107f). In contrast to Scandinavian or central European patterns of welfare provision, social assistance, however, rather seldom means 'cash benefits', especially in a historical perspective. Sharing a general trait with the other Mediterranean EU member countries (cf. Ferrera 1997: 14ff, enumerating seven general characteristics of the Greek, Italian, Portuguese and Spanish welfare state), the Portu-

guese system of social assistance lacks a general minimum income scheme for persons in precarious financial situations without access to social insurance benefits (Leienbach et al. 1994: 145).

When the first legislative steps in order to shape the system of social welfare were undertaken by the new regime in 1933, the 'New State' (*Estado Novo*) was able to build on four elements: First, on a system of protection in case of work accidents, extended in 1919 to cover all employed persons. The patronal responsibility for occupational injuries had already been established six years earlier. The agency structure for this contingency has never approached or even been merged with other public or semi-public administrations. Since the 1980s it has been run by private insurance companies—and is therefore no longer reported on by COSS. Second, on systems of privately organized social protection, either in the form of company funds or organized as mutual benefit associations, both building on the solidarity of clearly delimited groups. By the mid-1930s, approximately 30 company retirement schemes existed, catering for about 75,000 individuals (Guibentif 1997: 52). In this segment, frag-

mented by company affiliation and/or occupational status, several pension funds (*caixas de pensões de reforma*) had already been created around the turn of the century for workers of specific private companies or public enterprises, mainly due to selective patronal activities (Maia 1985: 35). A third element to fall back on had been administrative expertise. Even if the introduction of an obligatory social insurance system covering sickness, workplace accidents, old-age, invalidity and survivors' pensions—based on five decrees of 10.06.1919—had failed completely due to an unstable political and economical environment, a qualified staff could be taken over. In addition, the assets of funds which had been institutionalized without ever having paid any benefits could be transferred into the new structures.

The Constitution of 1933 (Article 41) reaffirmed the State's obligation to promote conditions favourable for the development of institutions of social welfare and solidarity, including the mutual benefit societies (Maia 1985: 45). This general clause, however, did not entail the State's responsibility to participate in social welfare financing or administering. The National Labour

Statute (*Estatuto do Trabalho Nacional*), promulgated in September of the same year, clearly showed the preference for corporatist arrangements in the field of labour relations and social welfare. Articles 48 and 49 already mentioned the main characteristics of the system of social welfare to be built up in the following years: its corporatist organization, its financing by employers and employed persons, the risks to be covered and—at least a formal—co-determination by representatives of employers' associations and trade unions.

Those principles finally found their concrete realization in Law No. 1884 of 16.03.1935. State action was to be confined to the tasks of structuring and legally framing the development of institutions offering social protection. It defined four types—called 'categories'—of institutions of social welfare, virtually unchanged until the first major reform in 1962. For the next three to four decades to follow one can distinguish between a corporatist (1st category), privately or state-initiated (2nd category), associative (3rd category), and public (4th category) sector (cf. Table 1). The first pillar consisted of trade union funds, established from 1935 onwards, social

welfare institutions for agricultural workers, functioning from 1940 onwards, and funds for persons working in the fishing industry, starting their activities in 1937. The personal scope of the agricultural 'system' was later extended to cover other groups of persons in similar socio-economic conditions and living in rural areas. The legal framework conferred the task of implementing one core part of the system, the trade union benefit funds, to the parties to the wage agreement—by means of sectoral agreements between trade unions and employers' associations (Guibentif 1997: 51). Although the terminology used suggested that those funds were the backbone of the system, they only became important in terms of membership and benefit payments with a time lag of several years. For all employed persons, the adherence to the occupation- or company-based schemes was compulsory. Benefits were provided in cases of sickness, invalidity, old-age and death, generally based on insurance principles, to be supplemented by some social assistance elements. The distribution of social contributions was fixed by law at a ratio of 2:1 between employers and insured persons. By the

mid-1950s the financial burden amounted to 13.5% of gross wages or salaries, divided into shares of 8% and 5.5%, however (Leão 1955). The welfare funds of categories Ib and Ic, operating on a thin financial basis, for many years only provided meager benefits for surviving family members.

All other types of social protection agencies with a tradition reaching back to a time before Law No. 1884 were integrated into the legal typology and classified under categories II to IV. The social welfare funds of category II basically showed the same organizational and actuarial principles as those based on collective agreements. Those pensions or social welfare funds (*caixas de reforma ou de previdência*), however, could be established either on the basis of a private initiative of persons interested in a common social protection or by government action. All civil and military public service personnel was covered by specific funds (*instituições de previdência dos servidores do Estado e dos corpos administrativos*), united under category IV, providing for the same types of benefits as the trade union funds, but under the supervision of the Ministry of Finance. Even if company funds and mutual

Figure 2: Distribution of Social Protection Expenditure by Institutions, 1949-1963

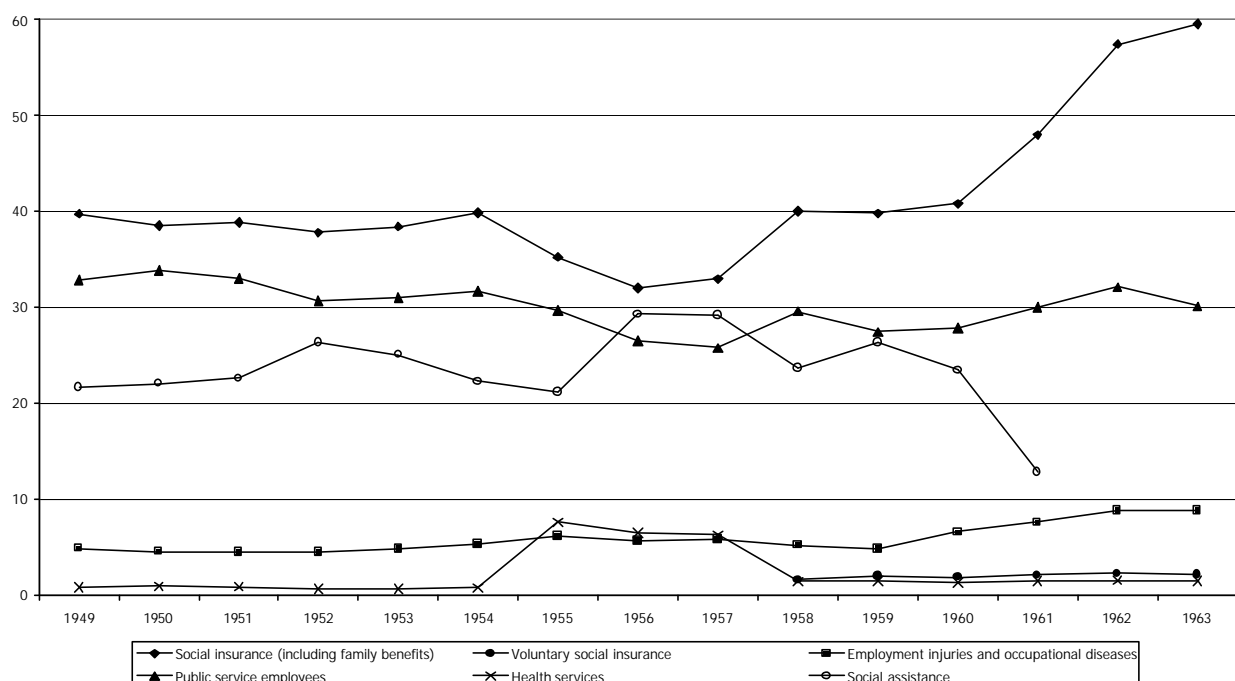


Table 1: Organizational Structures of Social Welfare Institutions 1935–1995 and their Representation by 'The Cost of Social Security' 1949-1993

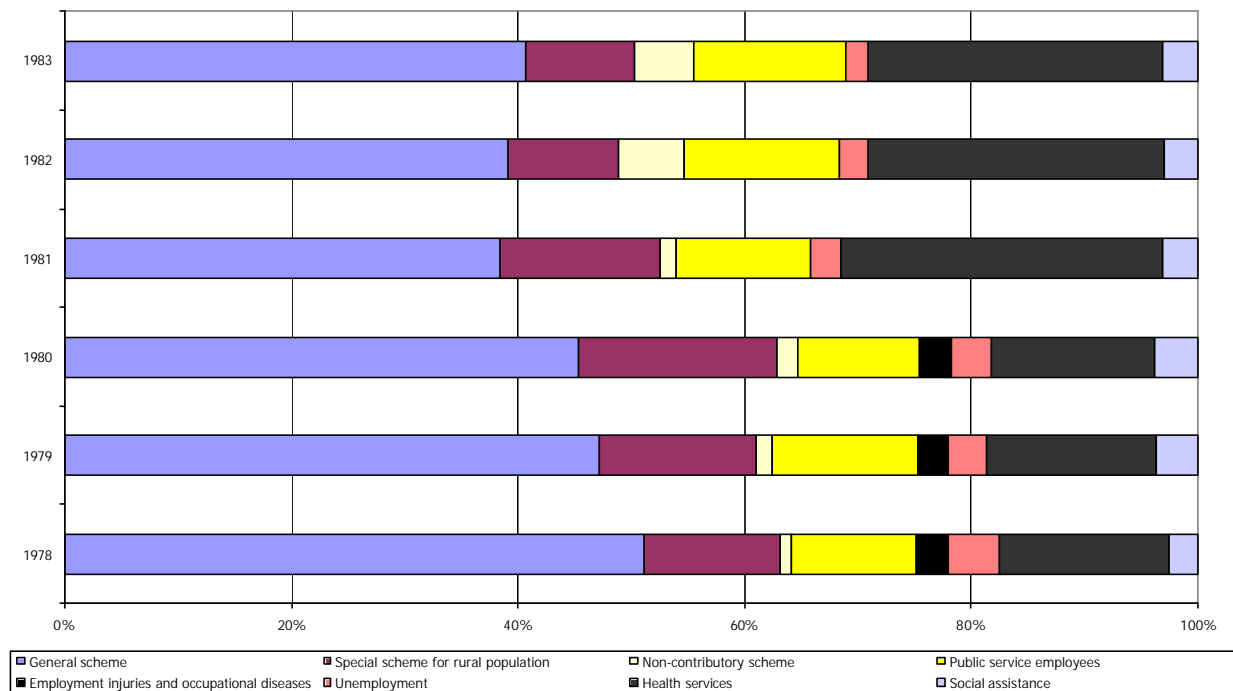
Phase 1: 1935–1962 (as defined by Law No. 1884 of 16.03.1935)			
I: Social welfare institutions based on bi-partite agreements [1 st category] (<i>Instituições de previdência dos organismos corporativos</i>)	II: Pensions or social welfare funds (1937) [2 nd category] (<i>Caixas de reforma ou de previdência</i>)	III: Mutual benefit societies [3 rd category] (<i>Associações de socorros mutuos</i>)	IV: Social welfare institutions for public sector personnel [4 th category] (<i>Instituições de previdência dos servidores do Estado e dos corpos administrativos</i>)
Ia: Trade union funds (<i>Caixas sindicais de previdência</i>)	Ib: Funds for persons working in agriculture or living in rural areas (<i>Caixas de previdência das casas do povo</i>)	Ic: Funds for persons working in fishing industry (<i>Casas dos pescadores</i>)	
Phase 2: 1962–end of 1970ies/1984 (according to Law No. 2115—Law on Social Welfare—of 18.06.1962)			
I: Trade union funds for social welfare [1 st category] (<i>Caixas sindicais de previdência</i>)	II: Pensions or social welfare funds [2 nd category] (<i>Caixas de reforma ou de previdência</i>)	III: Mutual benefit societies [3 rd category] (<i>Associações de socorros mutuos</i>)	IV: Social welfare institutions for public sector personnel [4 th category] (<i>Instituições de previdência dos servidores do Estado e dos corpos administrativos</i>)
Ia: Social welfare and family allowances funds (<i>Caixas de previdência e abono de família</i>)	Ib: Funds for persons working in agriculture or living in rural areas (<i>Caixas de previdência das casas do povo</i>)	Ic: Funds for persons working in fishing industry (<i>Casas dos pescadores</i>)	
Id: Pension funds (<i>Caixas de pensões</i>)	Ie: Occupational diseases funds (<i>Caixas de seguros de doenças profissionais</i>)		
Phase 3: 1984–today (as lined out by Law No. 28/84—Law on Social Welfare—of 14.08.1984)			
I: Contributory schemes (<i>Regimes contributivos</i>)		II: Non-contributory schemes (<i>Regimes não contributivos</i>)	III: Public service employees (<i>Sistema de protecção social da Função Pública</i>)
Ia: General schemes (<i>Regimes gerais</i>) with compulsory membership (<i>Inscrição obrigatória</i>)	Ib: Special schemes; phasing out (<i>Regimes especiais; fechados</i>)	IIa: Non-contributory scheme (<i>Regime não contributivo</i>)	IIIa: General scheme (<i>Sistema público</i>)
1) Employed persons (<i>Trabalhadores por conta de outrem</i>)*	Ic: Industrial and occupational schemes (<i>Regimes profissionais complementares</i>)	IIb: Systems on a par with the non-contributory scheme (<i>Regimes equiparados</i>)	IIIb: Special schemes and agencies (<i>Regimes especiais e instituições próprias</i>)
2) Self-employed persons (<i>Trabalhadores independentes</i>)	Id: Voluntary insurance (<i>Seguro social voluntário</i>) with facultative membership (<i>Inscrição facultativa</i>)		

* Further divided into the general scheme in the proper sense (*regime geral*) and several sub-schemes for specific professional groups (*sub-regimes de grupos profissionais específicos*), e.g. for agricultural workers (*trabalhadores agrícolas*), fishermen (*pescadores*), domestic service personnel (*peçoal do serviço doméstico*), merchant navy personnel (*marinha mercante*), dockers (*trabalhadores portuários*), clergymen (*membros do clero*) or handicapped persons (*trabalhadores com deficiência*).

Legend: Dark grey shade: Scheme covered by COSS, data available on same level; Light grey shade: Sub-scheme covered by COSS, data however have not made available differentiated by sub-schemes; No shade: System not reported on by COSS; Dotted arrow: Data on receipts and expenditure are reported for the sub-systems connected by the arrow.

Sources: Ahrens 1998, Guibentif 1997, das Neves 1993, Maia 1985; own adaptations.

Figure 3: Distribution of Social Protection Expenditure by Institutions, 1978-1983



benefit societies (*associações de socorros mútuos*), a core element of intermediate structures within the welfare state, were integrated into the legal typology of social welfare institutions by Law No. 1884 of 1935—namely as social welfare institutions of the 2nd and 3rd category, cf. Table 1)—, this basic legislation would not offer coordination mechanisms with regard to membership rules, entitlement conditions and benefit regulations in the different types of institutions. In 1896, the State had intervened with a first definitive regulation, several adaptations to this legal framework were implemented in 1931 and 1932 (Maia 1985: 42), remaining in force until 1981. These mutual aid societies, often named '*montepios*', showed a high degree of spatial concentration in the urban centres, i.e. especially in the Lisbon and Porto regions. Form and level of benefits in case of invalidity, old-age and death were fixed in the statutes and could consequently differ to a certain extent. Confronted with the 'promotion' of corporatist structures by state authorities after 1935, their importance in relative and absolute figures did consequently not cease to decline within the following decades. It is only with the establishment of the National Health Service after 1979 that

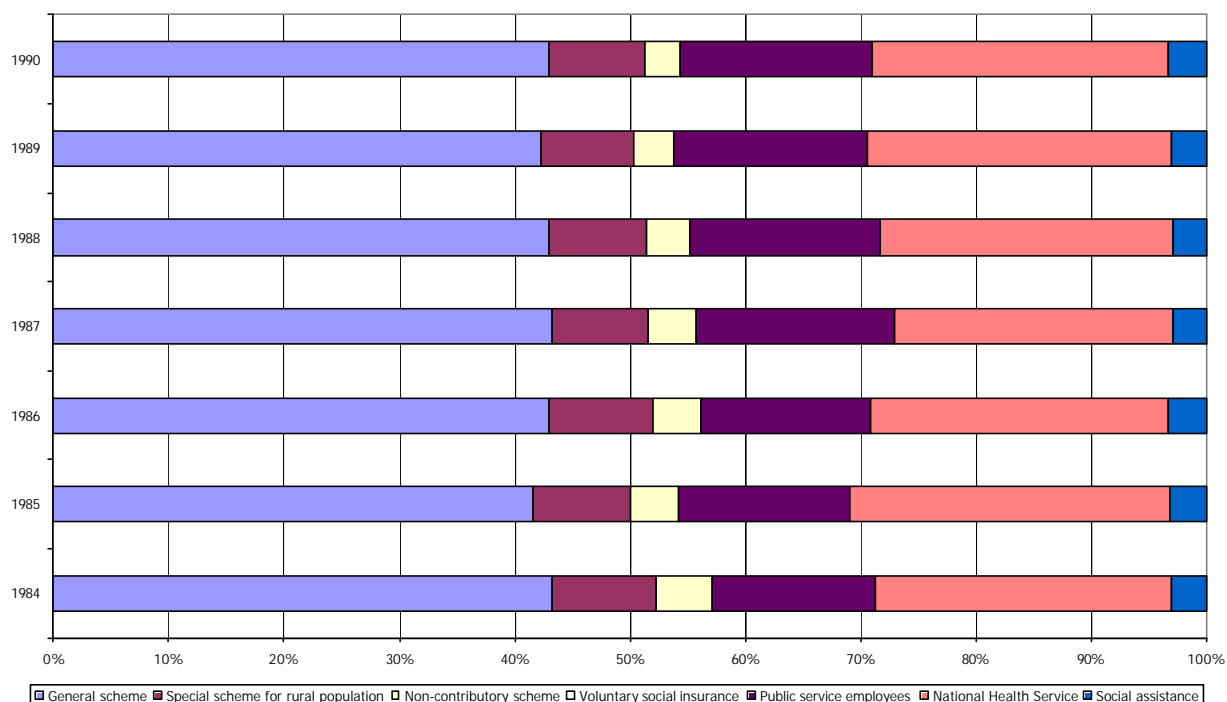
the mutual aid societies could record a certain upswing, attributable first to system deficiencies and second to a growing share of costs to be met by the private households.

At the latest in the 1950s, an evaluation of the system established until then made obvious that there were several insufficiencies (e.g. the low benefit levels) and inadequacies (e.g. scarcely 12% of all residents aged 15 to 64 were affiliated to a social welfare fund of categories I or II by the end of 1953). State authorities tried to tackle them with a twofold strategy (Maia 1985: 51f): First, the aim was to increase fund membership by enlarging the personal scope of already existing funds or by establishing them for professions or branches not yet covered by government initiative. As a consequence of the observed lack of initiative on the part of trade-unions and employers, as early as 1940 the State had been conferred the right to act, a competence confirmed in 1943. However, the gap between legal regulations and social reality remained rather deep until the 1970s, when most of the employed persons had been affiliated to one of the more than 1,000 funds. In 1962, of all employed about 30% in urban and 80% in rural areas—outside the fishing industry, with full coverage—had not yet been mem-

bers of any fund (Ahrens 1998: 105). This deficiency also held for most of the self-employed outside the liberal professions. As a second 'reaction', entitlement conditions were improved (e.g. the entitlement to family allowances as well as to medical and pharmaceutical assistance was maintained for old-age or invalidity pensioners), benefit regulations were designed more generously (e.g. with regard to the medical protection in 1960) or new types of benefits created. The introduction of minimum pensions in case of invalidity (1960) or old-age (1961) quite well illustrates this last approach.

Even if the new basic legislation—the Law on Social Welfare (No. 2115) of 18.06.1962—continued the typology of four 'categories' of social welfare institutions, in its wake a 'discrete renunciation of corporate ideas' (Guibentif 1997: 52) became obvious. The first step in a series of organizational reforms during the next decade was undertaken by means of a redefinition of the membership structure of categories I and II. Whereas the *caixas sindicais de previdência* from then on exclusively covered employed persons, the affiliation in *caixas de reforma ou de previdência* was restricted to independent workers. Second, Law No. 2115 offered an

Figure 4: Distribution of Social Protection Expenditure by Institutions, 1984-1990



instrument to apply model rules to a growing number of funds, referred to as general scheme—'a phrase that was to become commonplace' (Guibentif 1997: 55). Third, during the 1960s the largely corporatist social welfare system organized on a national or two-tier (north-south) level by occupations, branches or on the company level, continuously overlapped with and was finally replaced by a combined regional-national-level configuration, independent of occupation, employer or occupational status. The first district funds had already been set up in 1947. In the 1960s they became a vehicle for gradually achieving a (quasi) nationwide coverage of the workforce. From 1977 on they were transformed into 18 regional social security centres (reduced to 5 in 1993), one major step to implement the concept of unified and decentralized social security. Additionally, from 1942 onwards, the government had decided to establish a number of family benefit funds with district offices. After 1977, those two agencies were integrated. Another important change concerned the management of benefits. Whereas the district funds became responsible for the short-term financial transfers—i.e. sickness, maternity and family benefits—, a new

National Pension Fund (*Caixa Nacional de Pensões*) (category Id of phase 2), had to administer the long-term cash benefits (old-age, invalidity and survivors' pensions). In 1977 it was absorbed by the National Pensions Fund (*Centro Nacional de Pensões*). Additionally, a national occupational diseases fund (*Caixas Nacional de Seguros de Doenças Profissionais*) had been established. A financial reform introduced a pay-as-you-go-system, still to be supplemented by elements of capitalization—facilitated by a transfer of capital investment from the social welfare funds. In 1970, all trade union funds had to pay survivors' pensions, a consequent extension of spouse supplements to old-age and invalidity pensions, introduced in 1963. In the same year, the range of benefits—at a rather low level—for members of the rural funds (category Ib) was enlarged to include old-age pensions, and, finally in 1975, by invalidity pensions. In the four years prior to the revolution of 1974, reforms concerned to a lesser extent the structures, but rather the benefits—with the exception of public health and assistance. In 1973, e.g., uniform rules for family benefits were elaborated, presenting a first step of harmonizing the

schemes for those employed in the private and public sector.

The revolution of 1974, initiated by the Movement of the Armed Forces, led to a fundamental reshuffling of the social welfare system, first with regard to its conceptual basis, second in organizational terms, and third regarding the range of benefits. It took, however, a decade until these major amendments became effective and could be moulded into a new structure, laid down by Law No. 28/84, the legal framework still under application up to the present time. The constitution of 1976 reintroduced a right to individual social protection, Article 63. In the same article it fixes the guiding lines of the new concept of social protection, obliging the state to promote and coordinate the establishment of a tendentially universal, rather uniform and decentralized system (Maia 1985: 88ff). Trade unions, employers' associations and the insured persons were 'invited' to cooperate in the reorganization of social welfare institutions and given a central role in their management. The constitution stipulated that the system of social protection had to cover the risks of old-age, invalidity, death, sickness and unemployment as well as to ensure a minimum income for persons in precari-

ous economic situations. Article 108 for the first time stipulated the State's participation in the financing of social protection. This was the fundament for the establishment of a universal, tax-financed scheme in addition to categorial, social contribution-based schemes, with elements of individual and derived social protection. These changes had to entail repercussions on the government level, well illustrated, e.g., by Guibentif 1997 and Monte-Stolberg 2000.

Article 2 of the new framework legislation, Law 28/84 of 14.08.1984, definitively dismantling the administrative structures linked the corporatist organization of social welfare, names the two aims of the redesigned system: On the one hand, it should provide for the social protection of employed persons and their families in case of the provider's restricted ability to earn his/her own living on the labour market, his/her involuntary unemployment or death. On the other hand, persons outside the protected workforce lacking sufficient financial resources should not be left without a 'safety net', either. The actual system structures having evolved since the mid-1980s reflect this dichotomy. Contributory schemes are juxtaposed to, but at the same time coordinated with non-contributory schemes (cf. Table 1). The public service employees (around 634,000 persons in 1990, i.e. 14% of all insured persons) continue to be covered by specific agencies with distinct entitlement conditions and benefits regulations, which, however, are harmonized with the rules of the general scheme. An exhaustive overview of the components of the macro-system of social protection is given by das Neves 1993: 20ff.

Within the schemes, mainly financed by social contributions, a 'concentration process' was to be observed. Members of sectoral and company funds had gradually been transferred to the General Scheme (*Regime Geral*), which became more and more defragmented. In 1993, only a dozen special schemes (*regimes especiais*) had survived,

covering specific professional groups (cf. Table 1), with about 150,000 persons as of 31.12.1990 (Ahrens 1998: 128). They are to be phased out in the medium term. The categories Ia, Ib, Ic and II of phase 2 now form the general scheme (phase 3, type 1a) in the proper sense, bringing together employed and self-employed persons, about 3.75 million in 1990, 83% of the insured. The system for agricultural workers and other categories of rural inhabitants (category 1b of phase 2) became part of the general scheme in 1986, however, still is administered as a sub-scheme. Its management had been handed over from the *casas do povo* to the regional social security centres. The institutions referred to as category Ia in phases 1 and 2 were partially transferred to industrial and occupational schemes (*regimes profissionais complementares*) which now offer additional group-specific advantages in cash or kind. As the last element in this tissue of contributory schemes, a voluntary (pension) insurance (*seguro social voluntário*) was set up by Decree-law 380/89 of 27.10.1980. It has not played a significant role ever since, neither in terms of membership nor in terms of benefit provision.

The so-called non-contributory scheme (*Regime não contributivo*), offering means-tested benefits, had its roots in the tax-financed social pension (*pensão social*), introduced in 1975. Within the next few years it had been improved and supplemented with other benefits for families and the unemployed. Those benefits finally were integrated into a new framework, based on Decree-law No. 160/80 of 27.05.1980. The other innovation outside the social insurance schemes took place in the field of health. In 1979, a National Health Service (*Serviço Nacional de Saúde*) was established, giving universal and principally cost-free access. This service succeeded an exclusive and fragmented system of health care, run by the medico-social services of the social welfare funds and limited to their members. In addition, those funds had partially covered hospital care.

In the immediate wake of the revolution, the range of benefits had been enlarged to include transfers for unemployed persons in the form of assistance payments (*subsídio de desemprego*), based on Decree No. 411/74 of 05.09.1974. This new scheme was rebuilt to form an unemployment insurance in 1985. Further adaptations on the level of benefits are closely linked to efforts aimed at harmonizing or at least making more compatible the Portuguese legislation with European social law. After having attained this goal, even at inadequate benefit levels, stabilization and continuity became and still are the prior concern for the decade to come.

Options for an institution-oriented analysis of social policy

Serving as a basis for research on social protection financing and expenditure, COSS offers several options of analysis. First, differentiated by the social risks to be covered by the inquiry which normally correspond to social policy functions. Figure 1 reflects the distribution of expenditure for social welfare by functions. Both 'strong points' and problematic aspects are highlighted by the histogramme. On the one hand, one might mention the long historical period covered, the continuity with which the different functions can be looked at. On the other hand, functions are not always reported on separately, and—what is even more important—the attribution of specific cash transfers, social services or benefits in kind is not made transparent in the documentation accompanying the questionnaires filled out by the national agencies replying to the ILO. For example, it is not possible to 'isolate' the expenditure for the first three functions listed in Figure 1, for long periods of time. Only from 1965 on are the first two and the third category clearly separated. Finally, invalidity pensions are to be detached from the other types of pensions only for the decade starting in the end of the 1970s. Attributing benefits to functions is hardly ever a great challenge for 'unemployment' or 'employment injuries'. However, it is often far from clear which so-

cial welfare activities are summed up under the heading 'social assistance' of 'family benefits'. Which services are included, which agencies skipped? A more general problem resides in the fact that certain benefits or services or even complete functions are not continuously or comprehensively reported on. An illustration is given for 'social assistance' for the years 1961 to 1963 by Figures 1 and 2. In the table for 1961 a remark states that it has not been possible to include the same institutions as in the years before. The fact that this has not been considered leads to a cut of its relative share by 50% in 1963. For the years 1962 and 1963 no data were made available, entailing 'artificial' increases for all other functions. One major potential' of COSS, however, resides in its long 'tradition'. Long-term developments can be grasped well, e.g. the continuous relative decrease in importance of family and social assistance benefits. Their high share up to the end of the 1950s indirectly hints at the state of development of the Portuguese social protection system, especially at the low 'maturity' of social insurance schemes. The growing relative share of 'sickness/health care' after 1979 can mainly be explained with the establishment of the National Health Service.

The second main line for analysis, namely of institutions, is already suggested by the inquiry's concept, focusing on central schemes, funds, agencies, or programmes of social protection. Organizational reforms are normally reflected in the structure of reporting, leading to ruptures. As can be learned from a comparison of Table 1 with Figures 2 to 4, the degree of correspondence between 'real' organizational patterns and the system as reported on by COSS is fairly high. All major schemes are represented statistically, all newly arranged schemes clearly reflected. Especially the results for the period 1984–1990 (Figure 4) show great stability. Although COSS from 1988 onwards separately reports the 'voluntary social insurance', no data are visible in the graph due to very limited weight. In case an institution is to

provide for a broad range of different benefits for diverse target groups, i.e. if it is not restricted to a certain field of social protection by name or legal definition, cross-tabulations of institutions and functions, however, are not generally possible. This difficulty might be rather negligible if data for 'sickness' and 'health care' are not indicated separately. At least estimations are possible, because the latter as a rule is mainly provided in the form of medical care and other benefits in kind, whereas cash benefits to compensate for periods of temporary absence from work should make up for the 'lion's share' for the first function mentioned. A distinction, however, is no longer possible if 'sickness/health care' are not distinguished from benefits to be attributed to the 'invalidity' function. In the Portuguese case, a user is confronted with this limitation up to 1963 regarding 'social insurance'. For 'public service employees', a distinction, however, has already been made from the start, but has been discontinued e.g. in the periods 1978–1983 and since 1991. As a consequence, this scheme had to be subsumed under the residual category 'other schemes', cf. Figure 1. Nonetheless, COSS normally shows a degree of correspondence between legally defined and statistically reported institutional structures. Even if a consistency over time can hardly be achieved over the whole span of time covered by COSS, data are fairly appropriate for analyses limited to medium-term periods of time. Both strategies of analysis might be impeded to a certain extent by gaps, incomplete data, intransparent statistical information or inconsistencies regarding the way and extent, schemes that should be taken account of according to the concept actually are covered. Background knowledge of institutions and organizational structures and their changing role or importance over time, however, remains central, both for an understanding of data and documentation contained in the database on COSS and for a case-specific evaluation of the problematic aspects mentioned.

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A Comparative Portrait of Trade Union Development in Western Europe since 1945

Anyone who is interested in Europe, as a citizen or scientist, faces the basic question of the unity and diversity of the European societies. Three main developmental processes have shaped the social structures and institutions of the European societies since the nineteenth century: population growth and demographic transition; industrialization and the changing division of labour; democratization and the growth of welfare states. These major developments or growth processes are covered by a multi-volume-series of historical data handbooks, named 'The Societies of Europe'. They have been produced at the Mannheim Centre for European Social Research (MZES). With this series their editors—Peter Flora, Franz Kraus and Franz Rothenbacher—hope to improve the empirical basis for a comparative-historical analysis of the Societies of Europe'. After the volume on 'Elections in Western Europe since 1815' (Daniele Caramani), published in

1999, Bernhard Ebbinghaus and Jelle Visser presented a comparative data handbook on trade unions in Western Europe since 1945.

Geographical Scope

This handbook aims to map the variations in union organization and membership in fifteen Western European economies. These are Austria, Belgium, Denmark, Finland, France, Germany, Ireland, Italy, The Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and the United Kingdom (or in some cases: Great Britain, which excludes Northern Ireland). Lack of data and research support have forced the authors to leave out late-democratizing Greece and small state Luxemburg within the EU, and Iceland and Liechtenstein within the European Economic Area (EEA).

Long years of authoritarian rule—in Spain until after Franco's death in 1975, in Portugal until the fall of Salazar and the April Revolution of 1974—had stalled the emergence of

free trade unions until almost three decades after the end of World War II. Data on these countries are therefore limited to a much shorter time span, and are also less reliable, given the often political nature of membership claims during the initial period. In a separate concluding chapter, Ebbinghaus and Visser have brought together some data on transnational unionism in Western Europe, in particular the European Trade Union Confederation (ETUC) and its sectoral organizations.

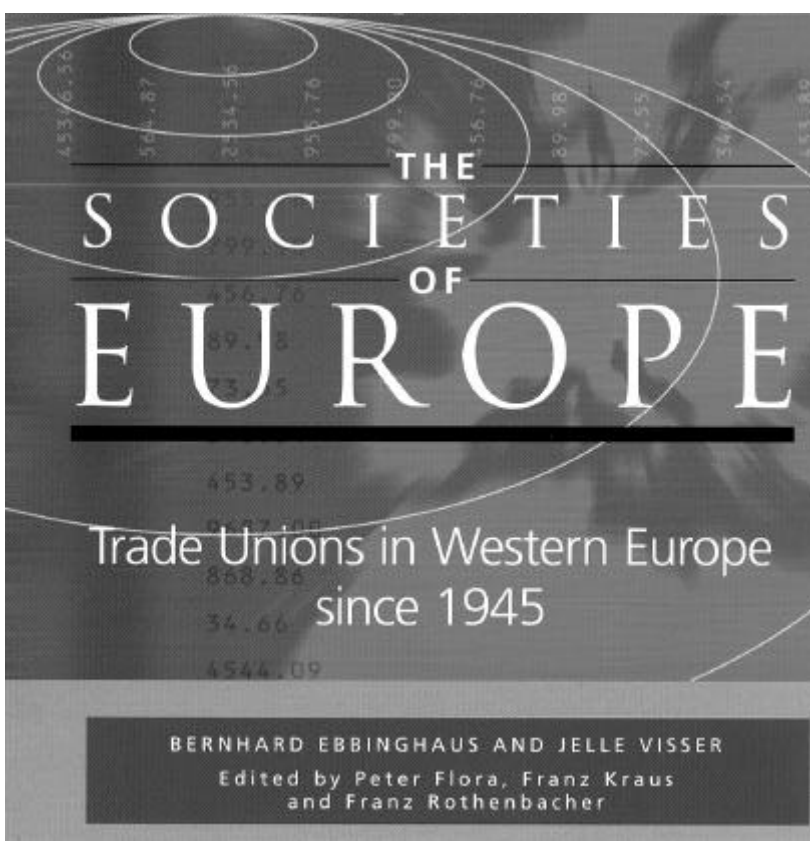
Data Sources and Collection

The main strategy in data gathering has been to collect data on national unions, both affiliated and non-affiliated, with supplementary data on independent locals and on higher-order organizations (cartels and confederations). For each country, the database begins with recording information on the following items: (a) The organizational history of each national union organization, (b) The history and patterns of affiliation with a confederation, (c) The organizational domain and type of the national unions, (d) Annual membership data.

A database was constructed for each national union and reaggregated for each confederation and country. Thus, for each country the authors can calculate summary statistics for three levels of aggregation: (1) the national unions (with and without the independent locals); (2) the confederations (affiliated unions and individual membership), and (3) the national union system. The number of records for the organizational files varies between less than twenty for Austria and over one thousand for the United Kingdom.

The Contents of the Handbook

Each country chapter starts with a profile, including a brief historical sketch that introduces the reader to the country's history, the development of labour relations, and the formation of union movements. The profile also gives an overview of the main trends in the country tables and background information on the sources, comparability and reliability of the data collection.



In addition to some unstandardized tables in the profile, a number of standardized tables are given in the second section of each chapter. Following two chronologies (events in political development and labour relations; changes in party, employer, and union organization) and organizational histories (lists of major confederations and major national unions), eight tables provide information on the trade union system: the organizational changes, the concentration, and the share of membership across confederations. Further tables present time-series data on union membership and union density overall, for different domains and sectors, and for the main union confederations.

A comparative chapter maps the main trends over time and charts cross-national differences in Western Europe since 1945. It gives an overview of the main dimensions and variables used in the country chapters. In addition to that analysis, this chapter presents in its comparative tables a number of comparable indicators on the development of union organizations, the distribution and concentration of union membership, and the mobilization of members overall and according to various social groups.

In addition to the comparative and country chapters, the handbook gives a brief overview of European-level union organizations in the appendix. The appendix also includes some technical notes on the labour force statistics used, and a brief note on the CD-ROM accompanying the handbook. While the handbook can be used on its own, the CD-ROM supplements the handbook and should be used as a guide. The CD-ROM not only gives the reader a computerized version of many tables provided in the handbook, thus allowing further analysis, but it also presents some additional

tables not published in the handbook (in particular, where available, membership series of all major unions included in the handbook). It also includes a database with information on the major unions, their affiliation, their sector distribution, and most importantly, the membership series. The reader will thus find in the handbook and the CD-ROM a unique tool for further analysis of union development in one or more countries of Western Europe.

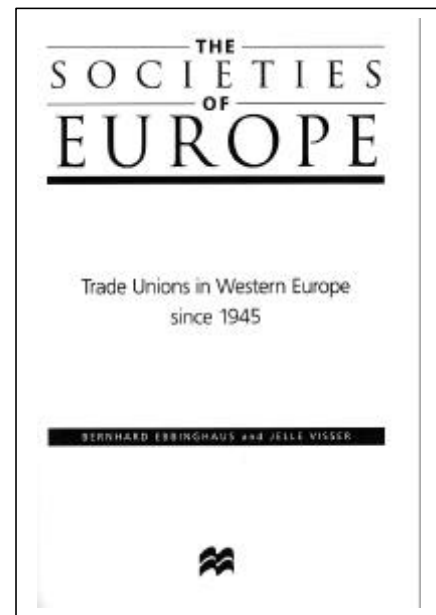
Altogether, the data-collection presented in this handbook is, and will remain, unrivalled for its wealth of information, its strictly comparative character, its sensitivity to varying contexts, and its scrupulousness in dealing with the manifold data problems. Ebbinghaus and Visser 'hope that by offering rigorously scrutinized data and comparative indicators for historical, cross-national, sectoral, and organizational comparison, fellow researchers and students—be they labour historians, economists, sociologists, political scientists, or industrial relations specialists—will be able to address old and new questions from a more informed position'.

by Günter Braun, MZES

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ECSR Workshops (September 13th – 14th)

The ECSR Workshops provide a forum for young researchers to present their work and facilitate co-operation among them. Groups on the following topics are chaired by:

Dr. Thomas Bahle and Prof. Anne Gauthier:

Family Policy in Europe

Dr. Sonja Drobnic and Dr. Karin Kurz:

Interdependencies in the Life Course and Social Inequality

Dr. Bernhard Ebbinghaus and Prof. Jelle Visser :

Education, Labour Market and Labour Organisations

Prof. Duncan Gallie and Prof. Chris Whelan:

Labour Market Precarity, Poverty and Social Exclusion

Prof. Chiara Saraceno

Gender Inequalities

Prof. Karl-Ulrich Mayer, Dr. Francesco Billari,

Dr. Henriette Engelhardt, and Dr. Emmanuelle Tulle-Winton:

Macro Social Change, Welfare State

Adaptation and Life Course Out-

Comes

Prof. Hartmut Esser and Dr. Frank Kalter:

Migration and Interethnic Relations

Prof. Bernd Wegener and Dr. Stefan Liebig:

Comparative Social Justice Research

Prof. Anthony Heath, Prof. Nan Dirk de

Graaf, Dr Paul Nieuwebeerta

Comparative Political Sociology

Plenary Lectures:

Prof. Susan McRae: Polarisation in families' lifestyles and life chances

Prof. Anthony Heath: Social and Political Cleavages: Integrating Theory and Research

For further information please refer to our web page:

<http://www.sociology.ox.ac.uk/ecsr.html>

Books on European Comparative Research

Rena Lohan, Mark Conrad, Ken Hannigan, and John A. Jackson, eds.: *For the Record: Data Archives, Electronic Records, Access to Information and the Needs of the Research Community*. Dublin: Institute of Public Administration, 1996. VIII, 120 pp. ISBN 1-872002-63-3. £ 14.00.

The papers collected in this volume were presented at a conference reflecting the title of the volume, held in Dublin on 11 December 1995. Although some years have already passed since publication, the book is still of importance. The main aim of the conference was to discuss developments in information technology, European integration, and the position and tasks of national archives and social science data archives. Experiences from the US, the UK, and the Nordic countries in data archiving are reported, thus encouraging *data archiving in Ireland* (and, more specifically, the establishment of an Irish social science data archive).

Research Centres

The *Slovak Documentation and Information Centre for Social Protection* (DISSO) at the *Research Institute for Labour, Social Affairs and Family*, Bratislava was newly established in 1999. Here an excerpt from the presentation of the institute: 'The wider objectives of DISSO are:

- To support the ongoing transformation process in the Slovak Republic through the improvement of the given information structure in the social sphere.
- To collect and to disseminate information on social security and social protection at the local, European and international level.
- To create a contact point for a wide network of Slovak organisations and institutions active in the social sphere and facilitate the process of communication and co-operation between the different actors, institutions and agencies.

The specific objective of DISSO is: To co-ordinate the activities of different actors in the field of social

protection, improve co-operation and optimise their output. It will be a catalytic agent between all functions and actors in the Slovak Republic's social protection landscape through

- The collection and dissemination of information on social security
- The exchange and co-ordination of information on the activities undertaken by the various social actors and
- The promotion of co-operation between these institutions.

DISSO offers:

Documentation centre: In the first place, DISSO is a documentation centre that contains basic information (books, periodicals, research reports, etc.) on social protection in the Slovak Republic as well as at the European and international level.

Exchange of information: The main task of the Centre is to co-ordinate the different actors active in the field of social protection. However, as these actors are often unaware of the activities of other actors, DISSO will publish its own 'Newsletter on Social Protection', that will be sent to all the target groups. This newsletter will contain basic information on current running projects and activities; on recent publications, reports or articles published by the different actors active in the field of social protection and on international programmes.

Data bases: The Centre has some unique data bases. They contain not only information on what is published in the field of social protection (bibliographic information by way of an author catalogue; a subject catalogue; a catalogue of periodicals and reports) but also enables everyone to find out 'who does what'.

Information: Slovak Documentation and Information Centre for Social Protection (DISSO), Research Institute for Labour, Social Affairs and Family, Špitálska 6, 812 41 Bratislava, Slovak Republic. Tel.: (421)(7) 5975 2618, Fax: (421)(7) 5296 6633, E-mail: disso@vupsvr.ov.sk.

Recent Social Reports in Europe

In *France*, the INSEE published the tenth edition of the three-annual *Données Sociales* in 1999, with the first edition having appeared as early as 1973. The present edition is highly characterized by a comparative—both internationally and European—and a historical orientation. As an innovation it includes at the end of each chapter tables with *Tendances*, summarizing statistically the main long-term trends and the place of France in the spectrum of the European nations. The *Données sociales* emphasize the dimension of inequality between nation states, social classes, age groups and sexes; this is one feature which makes it unique when compared with other national social reports. There is another positive characteristic: the contributions are innovative, tackle social questions not covered before, and also deal with topics not belonging to mainstream thinking. One example for this approach is the article written by L. Olier on the 'costs of our children' (*Combien nous coûtent nos enfants?*).

INSEE—Institut National de la Statistique et des Etudes Economiques: Données Sociales. La Société Française. Édition 1999. Paris: INSEE, 1999. 506 pp. ISBN 2-11-066-795-8. ISSN 0758-6531. In French.

Another important title in the field of monitoring the overall living conditions of the French population is the *Social Portrait of France* (*France, portrait social*), which is published annually. While the *Données Sociales* provide extensive analyses of the structure and development of the living conditions according to living domains, the *Social Portrait* tries to present a picture of more recent social, demographic and economic developments in France. The book is divided into three sections: the summary view of the last year; the section 'Dossier', and the 'Fiches thématiques'. The first section includes short articles discussing and analyzing major developments in the last few years. The second section contains selected substantive articles, while the third

section presents approximately 30 small contributions on nearly all aspects of social development. It also includes 'fiches' with data on European countries.

INSEE—Institut National de la Statistique et des Etudes Economiques: France: Portrait social. La Société Française. Édition 1999-2000. Paris: INSEE, 1999. 218 pp. ISBN 2-11-067-030-4. ISSN 1279-3671. In French.

In the *United Kingdom*, the third edition of 'Trends in British Society Since 1900' appeared with the title 'Twentieth-Century British Social Trends'. The first edition was issued in 1972, and a second enlarged version came out in 1988. This is the most formidable account of long-term trends in British society since the beginning of the last century. In 6 parts and 20 chapters all main subjects of long-term social trends are covered, starting with population and family, and ending with crime. Acknowledged capacities in their field were recruited for the individual chapters. The social trends covered in this volume are based on a large number of official statistics sources, but social survey material was used as well.

Halsey, A.H., and Josephine Webb, eds.: Twentieth-Century British Social Trends. Houndmills, Basingstoke, Hampshire, and London: Macmillan Press, 2000. xxviii, 738 pp. ISBN 0-333-72149-7.

In *Germany*, the 1999 edition of the 'Datenreport' appeared. This is the fifth issue in a series produced jointly by official statistics and social scientists. The traditional separation into two sections has been maintained: the first section deals with social trends on the basis of official statistics ('objective indicators'), while the second section has been written by social scientists on the basis of the repetitive Welfare Survey and the German Household Panel. Most contributions in the second part refer to 'subjective indicators'.

For the first time, figures and tables are presented in colour, improving visualization a lot. Also for the first time, data have been made accessi-

ble electronically via a CD-ROM accompanying the volume.

Statistisches Bundesamt, in co-operation with WZB and ZUMA, ed. Datenreport 1999. Schriftenreihe, vol. 365. Bonn: Bundeszentrale für politische Bildung, 2000. 623 pp. ISBN 3-89331-383-4, ISSN 0435-7604. A library edition is available from Olzog Verlag, Munich.

Historical Statistics

The economy of *Luxembourg* during the 20th century is described historico-quantitatively on the basis of the extensive historical statistics of Luxembourg collected during the last few years by STATEC. The voluminous book not only deals with economic topics; it also has a broader frame of reference, presenting growth processes in the field of population, employment, economic production. Many tables present long time-series; furthermore, long-term developments are presented by graphs. Extensive bibliographical references enable further investigations into the valuable material presented.

STATEC, sous la direction de Robert Weides: L'économie luxembourgeoise au 20^e siècle. Luxembourg: Editions le Phare. Editpress Luxembourg S.A. 551 pp. In French.

The *Welsh Office* published a new edition of the *Welsh Historical Statistics*, covering the years 1974–1996. It is a follow-up to the two-volume *Digest of Welsh Historical Statistics*, published in 1985, which covers the time period from the earliest times statistics were compiled (population figures from the 16th century, baptisms, marriages and burials since 1700) to the years 1973/4 resp. the census of 1971.

Welsh Office/Y Swyddfa Gymreig: Digest of Welsh Historical Statistics 1974–1996. By. L.J. Williams. Cardiff: Welsh Office, 1998. ISBN: 0-7504-2299-8. xiv, 342 pp.

Statistics Finland produced a useful historical account of Finland's population from 1749–1999. On the basis of time series for 150 years, basic tendencies of population development are highlighted, and projections until the mid-21st cen-

tury are made: the growth of Finland's population, population ageing, demographic transition, epidemiological transition, infant mortality, and life expectancy. The appendix includes long time series from 1749–1999 with main demographic variables.

A related title is 'Finnish Life Tables since 1751', published by Väinö Kannisto, Oiva Turpeinen and Mauri Nieminen in *Demographic Research*, Vol. 1(1), the journal of the Max-Planck-Institute for Demographic Research in Rostock (<http://www.demographic-research.org>). The authors have extended the Finnish life tables back to 1751 and are thus able to identify four stages of mortality transition, separated by the years 1880, 1945 and 1970.

Statistics Finland/Mauri Nieminen: Väestötilastoja 250 vuotta: Katsaus väestötilaston historiaan vuosina 1749–1999. [Population Statistics 250 Years: Overview of Historical Population Statistics for the Years 1749–1999]. Väestö [Population] 1999:8 (=ISSN 0784-8447). Helsinki: Statistics Finland. 75 pp. ISBN 951-727-679-6. In Finnish.

Guides and Bibliographies of National Population Censuses

Although already published more than ten years ago, the reference book by Ralph S. Clem on the Russian and Soviet Censuses deserves to be presented here. The book deals with the Russian census of 1897 and the Soviet censuses of 1920, 1926, 1937 and 1939, 1959, 1970 and 1979. The book is the best gateway to the census material collected in Russia and the Soviet Union during an eighty-year time span. Several descriptive chapters deal with the main topics covered by a population census: ethnicity and language, occupation and work force, urbanization and migration, marriage, family and fertility, and education and literacy. Three introductory chapters deal with the usefulness of the Soviet censuses for research, comparability problems, and the history of the Russian and Soviet censuses. The second main section of the handbook presents an index

and guide to the Russian and Soviet censuses 1897–1979. The index lists in English all titles of the individual tables and abstracts its main contents. A keyword index breaks down the contents of the tables of the different censuses according to subject categories.

All in all, this handbook is a very valuable instrument for all those working with census data either on the national level or for comparative purposes. A similar documentation of the 1989 census and the 2000 census would be highly welcomed.

Clem, Ralph S., ed.: Research Guide to the Russian and Soviet Censuses. (Studies in Soviet History and Society). Ithaca, N.Y. et al.: Cornell University Press, 1986. ISBN 0-8014-1338-0. 323 p.

Journals and Newsletters

European Union Politics (EUP). This journal appears three times a year in February, June and October, starting in 2000. London: Sage Publications. ISSN 1465-1165. Subscription: individual rate, two-year subscription £ 60, one-year subscription £ 30; institutional rate, two-year £ 240, one-year £ 120.

Executive editor: Gerald Schneider, University of Konstanz, Germany; *Associate editors:* Simon Hix, London School of Economics and Political Science, UK; Matthew Gabel, University of Kentucky, Lexington, USA. *Editorial office:* E-mail: eup@uni-konstanz.de, Homepage: www.uni-konstanz.de/FuF/Verwiss/GSchneider/eup.html.

Excerpt from the announcement: 'European Union Politics will stimulate the scientific debate on the political unification of Europe and bridge the gap between the theoretical and empirical analyses in this area. The journal will publish high quality work on the theory of integration, decision making in the European Union, the political aspects of fiscal and monetary policy integration, and the relations between the EU and the non-member states. *European Union Politics* particularly welcomes articles that offer a new theoretical argument, analyse original data in a novel

fashion or present an innovative methodological approach. The editorial team invites submissions from any sub-field of contemporary political science, including international relations, comparative politics, political economy, public administration, public policy, and political theory. While contributing to new developments at the cutting edge of theory and method, the journal will also be accessible to students and policy experts.'

Ordering: Sage Publications, 6 Bonhill Street, London, EC2A 4PU, UK. Tel.: +44 (0)171 374 0645, Fax: +44 (0)171 3748741, EUP Web Page: <http://www.sagepub.co.uk/journals/details/j0x296.html>.

Newsletter of the Robert Schuman Centre (RSC) for the Advanced Studies at the EUI in Florence. It is published three times a year and distributed free of charge. The newsletter was started in 1997 (no. 7 in Dec. 1999). *Ordering:* Robert Schuman Centre, European University Institute, Via dei Roccellini, I-50016 San Domenico de Fiesole, Italy. Tel.: Fax: 39 055 4685 770. Internet: <http://www.iue.it/RSC/Welcome.html>.

Social Science Japan. Newsletter of the Institute of Social Science, University of Tokyo. Three issues per year. ISSN 1340-7155. Free airmail subscriptions are available to institutions and individuals. Social Science Japan is also available on the World Wide Web at: <http://www.iss.u-tokyo.ac.jp>. The newsletter was started in July 1994. The most recent issue is no. 18 of April 2000.

Ordering: Published by the Information Centre for Social Science Research on Japan, Institute of Social Science, University of Tokyo, Hongo 7-3-1, Bunkyo-ku, Tokyo 113-0033 Japan. Tel.: +81 3 5841-4931, Fax: +81 3 5841-4905. E-mail: ssjinfo@iss.u-tokyo.ac.jp.

New MZES Publications Working Papers

Since the beginning of 1999 all working papers of the MZES are

published in one common working paper series (ISSN 1437-8574). The following working papers have been released and can be obtained from the MZES, University of Mannheim, D-68131 Mannheim. Tel. +49-621-292-1885, Fax +49-621-292-1735. Working papers published since 1997 are also available over the Internet and can be downloaded. Internet address: http://www.mzes.uni-mannheim.de/publi2_D.html.

Helena Laaksonen: **Young Adults in Changing Welfare States: Prolonged Transitions and Delayed Entries for Under-30s in Finland, Sweden and Germany in the '90s.** Mannheim: MZES, 2000 (Working Paper no. 12).
Claudia Gardberg Morner: **Making Ends Meet: Lone Mothers' Local Subsistence Strategies. Case Studies from Italy and Sweden.** Mannheim: MZES, 2000 (Working Paper no. 13).
Egbert Jahn: **'Nie wieder Krieg! Nie wieder Völkermord!': Der Kosovo-Konflikt als europäisches Problem.** Mannheim: MZES, 2000 (Working Paper no. 14).

Eriikka Oinonen: **Nations' Different Families? Contrasting Comparison of Finnish and Spanish 'Ideological Families'.** Mannheim: MZES, 2000 (Working Paper no. 15).

Jakob Edler: **Die Genese des Forschungsprogramms BRITE: Institutionalisierungsprozesse zur Überwindung eines europäischen Konsensdilemmas: eine reflexiv-institutionalistische Analyse.** Mannheim: MZES, 2000 (Working Paper no. 16).

Rüdiger Wolfrum: **Vorbereitende Willensbildung und Entscheidungsprozeß beim Abschluß multilateraler völkerrechtlicher Verträge.** Mannheim: MZES, 2000 (Working Paper no. 17).

Claus Wendt und Mathias Maucher: **Mütter zwischen Kinderbetreuung und Erwerbstätigkeit: Institutionelle Hilfen und Hürden bei einem beruflichen Wiedereinstieg nach einer Kinderpause.** Mannheim: MZES, 2000 (Working Paper no. 18).

Frank Kalter: **Measuring Segregation and Controlling for Independent Variables.** Mannheim: MZES, 2000 (Working Paper no. 19).

Susan Stewart: **Sprachenpolitik als Sicherheitsproblem in der Ukraine.** Mannheim: MZES, 2000 (Working Paper no. 20).

Hermann Schmitt und Jacques Thomasen: **Dynamic Representation: The Case of European Integration.** Mann-

heim: MZES, 2000 (Working Paper no. 21).

Carsten G. Ullrich: **Die soziale Akzeptanz des Wohlfahrtsstaates: Anmerkungen zum Forschungsstand.** Mannheim: MZES, 2000 (Working Paper no. 22).

Uwe Kischel: **The State as a Non-Unitary Actor: The Role of the Judicial Branch in International Negotiations.** Mannheim: MZES, 2000 (Working Paper no. 23).

Markus Gangl: **European Perspectives on Labour Market Entry: A Matter of Institutional Linkages between Training Systems and Labour Markets?** Mannheim: MZES, 2000 (Working Paper no. 24).

Markus Gangl: **Education and Labour Market Entry across Europe: The Impact of Institutional Arrangements in Training Systems and Labour Markets.** Mannheim: MZES, 2000 (Working Paper no. 25).

Markus Gangl: **Changing Labour Markets and Early Career Outcomes: Labour Market Entry in Europe over the Past Decade.** Mannheim: MZES, 2000 (Working Paper no. 26).

New Books from MZES

van Deth, Jan W., and Thomas König, eds.: **Europäische Politikwissenschaft: Ein Blick in die Werkstatt.** [Mannheimer Jahrbuch für Europäische Sozialforschung, vol. 4]. Frankfurt/New York: Campus, 2000. 457 pp., DM 98.00, ISBN 3-593-36362-3.

This volume provides an excellent insight into the high level of European research in political science. The authors examine, among other things, the mediating role political institutions have, the relation between politics, bureaucracy and institutional reform, regionalization in the era of globalization, the safeguarding of peace, fiscal policy after the introduction of the euro, and problems related to the Eastern enlargement of the EU.

Caramani, Daniele: **Elections in Western Europe since 1815: Electoral Results by Constituencies.** 'The Societies of Europe': A Historical Datahandbook Series, ed. by P. Flora, F. Kraus, and F. Rothenbacher. London: Macmillan, 2000. 1,090 pp. + CD-ROM. ISBN: 0-333-77111-7.

This data handbook and the CD-ROM contain the systematic and standardized collection of general elections results at the level of single constituencies for 18 Western European countries since the

19th century, accompanied by thorough documentation. The handbook is divided into 3 parts. Part I provides a comparative description of the mechanics of electoral laws, the institutional development of elections and the territorial structure of the vote. Part II provides information by country: dates and types of elections, the evolution of party systems, the connectivity of constituency level results to official statistics, and results tables. Part III provides additional information with regard to the most profitable use of the data, such as the evolution of election statistics, etc.

This book is part of the historical data handbook series 'The Societies of Europe', edited by members of the MZES.

Ebbinghaus, Bernhard, and Jelle Visser, eds.: **Trade Unions in Western Europe since 1945.** 'The Societies of Europe': A Historical Datahandbook Series, ed. by P. Flora, F. Kraus, and F. Rothenbacher. London/New York: Macmillan/Grove, 2000. 807 pp. + CD-ROM. ISBN: 0-333-77112-5.

Trade unions are one of the major social institutions in modern industrial societies. Today, when they increasingly face pressures from social, economic and political changes, it is appropriate to look at their evolution over the last half of this century. This handbook aims to map the variations in union organization and membership in fifteen western European countries. The introductory guide, comparative overview, country profiles, chronologies, cross sectional and time series tables, as well as comparative indicators are intended to facilitate and encourage the comparative and historical study of modern trade union organization. In addition, the CD-ROM provides easy electronic access to handbook tables and to additional databases on national union organizations and their membership series for further individual in-depth analysis.

The book is part of the historical data handbook series 'The Societies of Europe', edited by members of the MZES (see also pages 21–2 of this newsletter).

Forthcoming Events:

Third Conference of the International Society for Quality of Life Studies, 20th-22st July 2000, Girona, Spain. Organized by The University of Girona (UdG), through its Institut de Recerca sobre la Qualitat de Vida (IRQV) (Research Institute on Quality of Life) with the International Society for Quality-of-

Life Studies (ISQOLS). Information about the conference: Birona Convention Bureau, Gran Via Jaume I, 46, 17001-Girona, España. Phone: 34-972-418500, Fax: 34-972-418501, E-mail: Q2000@cambreascats.es, Internet: <http://business.wm.edu/isqols>, <http://www.cob.vt.edu/market/isqols/>.

IAOS Conference 2000 on 'Statistics, Development and Human Rights', 4th-8st September 2000, Montreux, Switzerland, Convention Centre of Montreux.

Organized by the Swiss Federal Statistical Office (SFSO) and the Swiss Development Co-operation Agency (SDC) for the International Association for Official Statistics (IAOS), a section of the International Statistical Institute (ISI).

Information about the conference: IAOS Conference Secretariat, Swiss Federal Statistical Office, Espace de l'Europe 10, CH-2010 Neuchâtel, Switzerland. Fax: +41 32 713 60 93, E-mail: iaos2000@bfs.admin.ch.

EURODATA Research Archive

The *EURODATA Research Archive* is an infrastructural unit of the *Mannheim Centre for European Social Research (MZES)* at the University of Mannheim (Germany). The archive has two basic objectives which are closely related to each other:

- to provide an adequate data infrastructure for the Centre's comparative research on European societies and European integration;
- to contribute to the establishment of a European infrastructure for comparative social research.

EURODATA's work is structured by own medium-term development and three-annual work plans, relating to three areas of activity:

- the systematic and continuous provision of meta-information on official statistics and social science data from the private sector (information archive);
- the development and maintenance of a library with statistical publications from statistical institutes, ministries, para-official institutions and certain intermediary organisations from the private sector (statistics library);
- the provision of computerised information, with a particular focus on the development of an integrated file system with historical time series and institutional information (file archive).

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EURODATA Newsletter

This newsletter is intended to contribute to facilitate data-based comparative research on European societies and politics. It is a product of the EURODATA Research Archive and has three major objectives:

- to disseminate information on the research activities of the Mannheim Centre for European Social Research, with particular emphasis on data-generating cross-national research the archive is involved in;
- to provide information on European data infrastructures and important developments;
- to provide a forum for the exchange of information on ongoing comparative social research on European societies and on European integration.

The newsletter is intended to be an open forum: contributions from other research institutes and individual researchers are always welcome. The EURODATA Newsletter will, as a rule, be divided into eight sections: Feature reports substantive findings from on-going cross-national research. Data Infrastructure reports on data institutions such as data archives, governmental and non-governmental organisations, and covers historical developments and current modes of access to data. Research Institutes presents profiles of research institutions with a cross-national orientation. Research Groups and Projects informs on cooperations and networks in comparative social research on Europe. Computer deals with specific aspects of electronic information processing and the use of electronic networks in comparative research. Country Profile provides background information on individual countries. Noticeboard provides general news including information about new statistics, recent books and studies, conference reports and announcements.

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