

Mutualism and welfare: experiences, debates and policies on social security sustainability in Portugal (1860-1934)

Joana Dias Pereira

ABSTRACT: Mutualism is widely recognised as key to the origin of welfare states in central and northern Europe. However, there is little knowledge about this relationship in the southern region, where welfare systems took on a particular character (Minesso, 2018). This article provides an overview of the long-term relationship between the mutualist movement and the emergence of a welfare system in Portugal. It is hoped that this study will contribute to our understanding of the agency of social movements in the design of social policies, taking into account the Portuguese case study.

Following Topalov's analytical model (Topalov, 1999), it examines the mutualist movement as a network that fostered social reform. To this end, the resolutions of mutualist congresses were analysed, from the 1865 1st Social Congress to the 1934 Mutualist Congress, the last before the 1974 revolution. Additionally, official surveys and social policies were examined from the first 1860 survey of mutual aid associations to the extinction of the Compulsory Social Insurance Institute in 1933.

The relational analysis of this evidence proves the importance of mutual societies as a laboratory of experimentation, observation, and statistical inquiry into social welfare, promoting consensus-building on state intervention in the sphere of social security, dealing with specific social risks. These findings contribute substantially to our understanding on the relationships between social mobilisation and public policies in a Southern setting during the liberal period.

KEYWORDS: Mutualism, Public Policies, Welfare State, Sustainability.

ECONLIT DESCRIPTORS: I38, K32, N3, Z18.

How to cite this article: PEREIRA, J.D. (2023): "Mutualism and welfare: experiences, debates and policies on social security sustainability in Portugal (1860-1934)", *CIRIEC-España, Revista de Economía Pública, Social y Cooperativa*, 107, 101-126.

DOI: <https://doi.org/10.7203/CIRIEC-E.107.22762>.

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RESUMEN: El mutualismo es ampliamente reconocido como clave en el origen de los estados de bienestar en el centro y norte de Europa. Sin embargo, hay poco conocimiento sobre esta relación en la región del sur, donde los sistemas de bienestar adquirieron un carácter particular (Minesso, 2018). Este artículo ofrece una visión general de la relación a largo plazo entre el movimiento mutualista y el surgimiento de un sistema de bienestar en Portugal. Se espera que este estudio contribuya a nuestra comprensión de la agencia de los movimientos sociales en el diseño de las políticas sociales, teniendo en cuenta el estudio de caso portugués.

Siguiendo el modelo analítico de Topalov (Topalov, 1999), se examina el movimiento mutualista como una red que impulsó la reforma social. Para ello, se analizaron las resoluciones de los congresos mutualistas, desde el I Congreso Social de 1865 hasta el Congreso Mutualista de 1934, el último antes de la revolución de 1974. Además, se examinaron las encuestas oficiales y las políticas sociales desde la primera encuesta de 1860 sobre las asociaciones de ayuda mutua hasta la extinción del Instituto del Seguro Social Obligatorio en 1933. El análisis relacional de estas pruebas demuestra la importancia de las mutualidades como laboratorio de experimentación, observación e investigación estadística sobre el bienestar social, promoviendo la construcción de consensos sobre la intervención del Estado en el ámbito de la seguridad social, haciendo frente a riesgos sociales específicos. Estos resultados contribuyen sustancialmente a nuestra comprensión de las relaciones entre la movilización social y las políticas públicas en un entorno sureño durante el periodo liberal.

PALABRAS CLAVE: Mutualismo, Políticas públicas, Estado del bienestar, Sostenibilidad.

Resumen amplio

Mutualismo y bienestar: experiencias, debates y políticas sobre la sostenibilidad de la seguridad social en Portugal (1860-1934)

El movimiento de mutualismo precedió a las políticas públicas en el campo de la protección social, siendo ampliamente reconocido como la clave del origen de los Estados de Bienestar en Europa Central y del Norte. Sin embargo, la literatura reciente sobre el papel del mutualismo en la construcción de estados de bienestar muestra que este debate está lejos de terminar y que todavía hay brechas críticas. En Portugal, la retórica salazarista propagado la inoperatividad del obligatorio sistema de seguridad social promovido por los gobiernos republicanos de posguerra. Esta retórica tuvo una influencia duradera en la historiografía portuguesa (Cardoso & Rocha, 2009). Entre las supuestas razones de este fracaso se destacó incluso la resistencia del mutualismo (Pereira, 2012) y su débil participación en la promoción de un sistema público de seguridad social. Algunos autores incluso argumentaron que: “Además de las agencias gubernamentales y la academia, parece que no se puede atribuir un papel significativo a los actores sociales, como las organizaciones de trabajadores y empleadores y las mutuas de seguros, en la redacción de las leyes de 1919. Por el contrario, es probable que esta débil base social explique en gran medida por qué la implementación temprana del sistema ha sido tan limitada” (Guibentif, 1996: 221). Más recientemente, Garrido y Pereira mitigaron estas tesis examinando la introducción y circulación de doctrinas sociales en Portugal (Garrido & Pereira, 2018). Sin embargo, todavía faltaba una investigación empírica profunda sobre su apropiación por parte de los movimientos sociales y el Estado y los resultados políticos de este proceso.

Este artículo proporciona una visión general y en la larga duración de la relación entre el movimiento mutualista y el surgimiento de un sistema de bienestar en Portugal, contribuyendo a una comprensión más completa de la agencia de los movimientos sociales en el diseño de las políticas sociales, teniendo en cuenta el estudio de caso portugués. Para ello, analizamos las resoluciones de los congresos mutuales, desde el Primer Congreso Social de 1865 hasta el Congreso Mutualista de 1934, el último antes de la revolución de 1974. También se han examinado las encuestas oficiales y las políticas sociales desde la primera encuesta de asociaciones de ayuda mutua hasta la extinción del Instituto Obligatorio de Seguridad Social en 1933. Aunque no todas estas fuentes están inexploradas, aún no han sido objeto de un examen relacional a largo plazo, aclarando la evolución de la relación entre la movilización social para el bienestar, los debates públicos y las políticas de protección social durante el período liberal.

La agencia del movimiento mutualista en este período se ilustra y analiza en cuatro fases descritas en los capítulos de este artículo. En el primer período, el movimiento mutuo funcio-

nó como un laboratorio de experimentación, observación y estudio estadístico, apoyando la convicción de que la intervención estatal era necesaria en la regulación de las asociaciones, imponiendo una gestión racional y asegurando un equilibrio entre las contribuciones y los beneficios de los miembros. Incluyendo líderes de asociaciones, académicos y políticos, el mutualismo es un espacio privilegiado para discutir y delinear reformas sociales en el contexto nacional. Finalmente, la movilización y concertación de estos actores sociales fueron significativas e impactantes, fuera y dentro del aparato estatal, promoviendo nuevos intereses gubernamentales en materia de seguridad social.

En un segundo período, la experiencia mutua en curso mostró la amenaza de insostenibilidad relacionada con contribuciones duraderas, como lo demuestran las encuestas y estudios consecutivos promovidos por el estado con la colaboración de activistas mutuos. Sobre la base de estas experiencias y análisis, la idea del papel del Estado como simple regulador y árbitro ha evolucionado hacia la defensa de una intervención pública más eficaz en este ámbito. Además, durante este período, se reforzaron los contactos internacionales y se conoció en profundidad las experiencias transfronterizas, incluido el modelo alemán de seguro obligatorio, que progresivamente se aceptó como el más eficaz para cubrir riesgos fuera del alcance de las iniciativas privadas, como discapacidad o vejez.

La revolución de 1910 llevó estas propuestas al centro del debate político y aseguró la implementación de las propuestas más significativas. La creación del Ministerio de Trabajo y Seguridad Social y la promulgación del sistema obligatorio de seguridad social fueron defendidas desde el principio y transformadas en ley, asegurando la integración de las asociaciones en un sistema de seguro basado en la mutualidad obligatoria. La Primera Guerra Mundial aceleró este proceso y promovió el consenso internacional, con la Organización Internacional del Trabajo abogando por la generalización de los sistemas públicos de seguridad social.

La reacción conservadora, que estuvo en el origen de las dictaduras europeas del siglo XX, como argumenta Angel Smith (Smith, 2007), se dirigió contra el movimiento obrero, pero también contra las reformas sociales implementadas por los gobiernos de posguerra. Sin embargo, las instituciones, actores y redes vinculadas al mutualismo ofrecieron una resistencia significativa a la suspensión de estos proyectos, defendiendo inequívocamente la responsabilidad del Estado en el ámbito del bienestar social.

Con respecto a los contextos sureños, marcados por una trayectoria específica, la historiografía y las cronologías orientadas a describir este proceso se centran principalmente en las iniciativas públicas, relegando las iniciativas sociales “inferiores” que precedieron y apoyaron la primera legislación social (Minesso, 2018). Esta tendencia tiende a oscurecer todo el proceso de experimentación, investigación y debate en torno a las primeras experiencias mutuas, desde mediados del siglo XIX, y por lo tanto la movilización social duradera y continua de defensa de estas políticas sociales, así como las razones de su evolución ideológica hacia la aceptación. Seguridad Social obligatoria. Del mismo modo, la tendencia a privilegiar la acción estatal ha eclipsado la resistencia popular contra la reacción conservadora.

El análisis cuyos resultados se presentan en este artículo demuestra la importancia de las sociedades de socorro mutuo como laboratorio de experimentación, observación e investiga-

ción estadística sobre el bienestar social, promoviendo la construcción de consensos sobre la intervención estatal en el campo de la seguridad social, cubriendo los riesgos que amenazan la sostenibilidad d mecanismos de seguridad social basados en la ayuda mutua, en particular la discapacidad y la vejez. La revisión y conexión de nuevas evidencias empíricas aclara la dinámica de experimentación e investigación, la circulación del conocimiento y la institucionalización, la movilización social y política, que estuvieron en el origen de las políticas sociales modernas. Además, esta evidencia demuestra que, en el caso de un estudio portugués, las asociaciones mutuales y sus activistas desempeñaron un papel central en este proceso desde el comienzo del movimiento hasta 1934, cuando entró en vigor el nuevo régimen corporativo y de bienestar.

1. Introduction

Different research trends cross mutualism historiography, analysing: the origins of mutualist associations within the confraternal movement, long-term continuities and innovations (Clark, 2001; Garrioch, 2017); the mutualist experiences within the history of the labour movement (Lequim, 1982; Robotti, 1990; Tomassini, 1999); the role of mutual aid associations in local communities, fostering cohesion and integration of migrants, during the urbanisation process (Maiullari, 1990) and participatory citizenship (Cottureau, 1986; Turner, 1999).

This article fits into a broad field of historical research that questions the relationship between mutualism and the origin of public systems of social security. This is a classic theme (Gibaud, 2008; Harris, 2004; M.H. Pereira, 2012) and still inspires relevant essays and abundant literature. Among the central polemics is the dichotomy between the theses relating the decline of mutualism to the increasing State intervention in the social sphere (Beito, 2000), and those highlighting the challenges mutual societies were already facing at the end of the nineteenth century, as a result of changes in the culture of the working class and the rise of commercial insurance agencies (Harris, 2018). This latter thesis argues that mutual societies, faced with severe financial problems, accepted the inevitability of state intervention, especially involving old-age pensions. These authors are mainly divided about the chronology of this acceptance, with some arguing that the free mutual societies' resistance to the compulsory model lasted until the 1929 crisis (Graves, 2009).

In Portugal, Salazarist rhetoric propagated the inoperability of the compulsory social insurance system promoted by post-war republican governments. This rhetoric had a long-lasting influence on Portuguese historiography (Cardoso & Rocha, 2009). Among the alleged reasons for this failure are mutualism resistance and its weak involvement in promoting a public social security system. Some authors even argued that: "Apart from government agencies and academia, it appears that no significant role can be attributed to social actors, such as workers' and employers' organisations and mutual insurance companies, in the drafting of the 1919 laws. On the contrary, it is likely that this weak social base largely explains why early implementation of the system was so limited" (Guibentif, 1996: 221). More recently, Garrido e Pereira mitigated these theses by examining the introduction and circulation of social doctrines in Portugal (Garrido & Pereira, 2018). However, it still lacks a deep empirical survey on their appropriation by the social movements and the State and this process political outcome.

Thereby, the question raised in this article crosses another field of research, focusing on the protagonists, the networks, and the spaces in which social reform through state intervention was discussed and defended. Christian Topalov has brought together a group of authors who have studied what he called the "reformer nebula". More than a dozen specialists studied the nineteenth-century multiple spaces, initiatives, and projects around assistance, the city, and labour, including the mutualist movement (Topalov, 1999). In its wake, there has been a deepening study on the actors, networks, and debates around work accidents, industrial hygiene, and social security revealing a broad national and transnational mobilisation favouring social reform (Rodogno et al., 2015).

Concerning the Portuguese case study, Joana Dias Pereira recently published an article seeking to synthesise the political demands of different groups and social movements during the crisis of liberalism, using a repertoire of collective action that Topalov described as “machines for producing consensus” - the congresses. The evidence presented by the author reveals the pioneering and central role of mutualism in public policy demands in the sphere of social protection (Pereira & Henriques, 2021). Nevertheless, the long-term connections between mutualist movement and the liberal period social policies have not yet been subject to a long-term and systematic scrutiny.

It is worth recalling the specificity of this process in southern settings, giving rise to what Maurizio Ferrera (Ferrera, 1996) has called a Mediterranean welfare system. This latter was characterised by a late and fragmented construction of the welfare state, making the family responsible for social protection due to the limited reach of public policies. Comparative studies have shown that after a period of experimentation with mechanisms aimed at extending social protection, between the last decades of the nineteenth and the first decades of the twentieth centuries, the rise of conservative dictatorships in southern Europe determined a retreat toward assistance-based rather than welfare systems (Minesso, 2018). However, the labour movement resistance to interwar conservative reaction is best known (Smith, 2007), than other social movements, such as mutualism resistance to the rise of authoritarianism (Pereira, 2019).

This article intends to clarify mutualism agency in the origin of liberal social policies, the post-war compulsory social insurance project, and the resistance to the conservative reaction. It analyses the relationship between mutual-aid associations political claims, from the 1865 1st Social Congress to the 1934 Mutualist Congress, the last before the 1974 revolution, and the public policies regarding social protection, from the 1860 first survey on mutual-aid associations to the Compulsory Social Insurance Institute extinction in 1933.

The primary sources analysed were the official surveys, commissions and legislation related to mutual aid associations and social protection, along with the minutes and resolutions of mutualist congresses. Although not all of these sources are unexplored, they have not been subject to a long-term and connected examination, clarifying the evolution of the relationship between social mobilisation, public debates and policies in the sphere of social protection during the liberal period. This analysis points to long-lasting and interdependent phenomena inducing awareness and consensus-building on the need for State intervention in social insurance, covering the risks that threatened the associations’ sustainability, such as disability and old age.

Academic and political elites surveyed and debated social insurance mechanisms on an international scale, producing knowledge, which, appropriated by the public authorities, giving rise to the first social security programs. Mutualism functioned as an interface between these transnational transfers, its experimentation, the processes of institutionalisation of knowledge, and its relationship with the social policies implemented from the last decade of the nineteenth century (Quirós, 2013). Overall, the mutualist movement played a vital role in the design, promotion, and implementation of social policies and its defence against the onslaught of the dictatorship from 1926 onwards.

The mutual-aid agency was crucial in the four stages described in the chapters of this article. The first, from the mid-19th century, involved associative experiences, official inquiries and reports on mutual societies, and the first mutualist movement political proposals. In the second stage, as of 1890, debates multiplied with more mutual-aid congresses and more claims addressed to the State, inducing the first liberal social policies. Then, in the Republican period, the new rulers seriously assumed state responsibility for social welfare, in straight cooperation with the mutualists. Finally, from 1926, these same social actors strongly resisted this scheme suspension and struggled against the new regime imposed by the dictatorship imposed on corporate assistance.

2. Experiences, surveys and debates (1850-1889)

As alluded to, the mutualist movement, from its origins, constituted a space in which different political actors came together to argue for greater state interventionism in the sphere of social security. Although there were some earlier experiences, it was from the mid-19th century when literary and political elites linked to the *movimento regenerador*¹ (regenerative movement) began to propagate mutualism, that the first upsurge of mutual aid associations took place.

The promotion of mutualism was first carried out in the newspaper *Ecco dos Operários (Workers' Eco)*², founded in 1850 by the engineer Francisco Sousa Brandão and the journalist Manuel Lopes de Mendonça, who would be joined by the printer Francisco Vieira da Silva. Two years later, the same actors founded the *Centro Promotor dos Melhoramentos das Classes Laboriosas (CPMCL)*, federating the mutualist associations founded in the meantime by Lisbon craftsmen. The CPMCL involved philanthropists and reformers, men of science and public administration, who considered voluntary association the answer to the so-called social question. The *Journal of the Centre for the Improvement of Working Classes*³ developed the debate on mutualism agency in economic and social progress.

The government inquiry into the first outbreak of mutual-aid associations followed the philanthropic elites engagement. In November 1860, the Minister of Public Works sent all district governors a questionnaire to draw up the first official statistics. The description and valorisation of mutualism in this questionnaire were in line with a new conception of social welfare in detriment of the assistance-based regime in force, and the need for official intervention in its regulation and supervision was immediately recognised:

1. *The Regenerator Party led the government from 1851 to 1868, fostering the development and modernisation of the Portuguese economy and society through public investment.*

2. Available online at: <https://purl.pt/13464>

3. Available online at: <https://purl.pt/17413>

The aids received in compensation for the modest contributions paid by the mutual aid societies members are not alms for those whom sickness and the inability resulting from old age make it impossible to work. On the contrary, these contributions represent acquired rights and an insurance premium paid by the interested parties by force of daily savings. (...) The working classes are beginning to know their real interests. Suppose the public authorities demonstrate to them the advantages of these institutions not only with theoretical arguments but also with examples gleaned, so to speak, from the inner life of such societies. In that case, their conviction will be more profound, and the zeal for the spirit of association properly understood will increase with beneficial results⁴.

This survey intended to quantify and categorise the associative membership and the subsidies assured⁵. Twenty-eight associations from seven districts responded to the questionnaire, revealing a set of small institutions, a great weight of the craft community and a residual presence of honorary members or benefactors. The statistical data show that the institutions' revenues could be standardised among fees, dues, benefits, and other sources, illustrating the diversity of means used to raise funds. On the other hand, expenses were entirely devoted to welfare, medicines, allowances and fees of health professionals⁶. The statistical analysis was repeated in 1866 and 1869, increasing the sample but not the general conclusions. The societies financial balance was precarious. The accumulated capital was still small, requiring special funds to meet fixed expenses⁷.

At the origin of this new governmental interest was the influence of the intergovernmental and scientific congresses that preceded it. Portuguese politicians and scientists had participated in the hygienist movement since the mid-19th century when they participated in the first International Sanitary Conference of 1851. Among these assemblies, especially after the popular mobilisations of 1848, those that addressed the social issue stand out, such as the international penitentiary, statistical or beneficence congresses, which express the growing influence of the various European social reform trends (Garrido & Pereira, 2018; Pereira & Henriques, 2021).

The mutualist movement actively participated in this process. In 1862, the CPMCL was invited to organise information on workers' associations to present at the Berlin Statistical Congress of 1863 (Rosendo, 1996, 466). Also, it is worth noting the participation of a craftsmen delegation organised by the CPMCL at the 1862 Universal Exhibition, in which the *III Congress of Beneficence* was held, on the initiative of the Association for the Advancement of Social Sciences⁸.

4. Official letter and model from the Ministry of Public Works demanding that the civil governors send to the government in January of each year a list of all the mutual aid associations or montepios existing or dissolved in the respective districts, in which several crucial questions are satisfied for the statistics of this subject, November 30, 1860, Royal Legislation, Book 1860.

5. Responses to the questionnaires sent out by the circulars of November 28, 1860, and September 8, 1866, concerning the operation of mutual aid associations (1860-1872). BAHMOP. DGCI-RCI-1S.

6. Responses to the questionnaires sent out by the circulars of November 28, 1860, and September 8, 1866, concerning the operation of mutual aid associations (1860-1872). BAHMOP. DGCI-RCI-1S.

7. Questionnaire addressed the mutual-aid societies for 1869 (1869-1871). BAHMOP. DGCI-RCI-1S.

8. *Congrès international de bienfaisance de Londres*. Londres: Bureau de l'Association Nationale pour les Progrès des Sciences Sociales, VII.

The CPMCL also managed to organise the first associative congress in Portugal, the *Social Congress*, between October 1865 and February 1866. It brought together 71 institutions, primarily mutualists. Along with the associative delegates, several personalities linked to the regenerative movement were present⁹. The weekly sessions minutes, published in *A Federação* (The Federation), indicate that the associations' precarity and the prospects for their development was the delegates main concern. Discussions focused the creation of a federation of mutual aid associations to reduce administrative and clinical costs. However, the relationship with the State was not neglected, being requested from the government "a law under which the mutual aid associations should be founded, as well as the creation of a central commission to analyse and propose measures tending to social improvements" (Goodolphim, 1889: 116-117).

The first mutualist political claims had immediate impact. In November 1866, two commissions were created by royal decree, one in Lisbon and the other in Porto, bringing together a wide range of politicians, academics and activists to assess mutual aid societies development and propose the policies necessary for their sustainability (Goodolphim, 1889: 117). The Minister and Secretary of State for Public Works recommend these commissions creation in a report reflecting a turn in public policy orientation, a new trend towards State interventionism. At this stage, politicians primary purpose was to improve the societies management. Therefore, the objective was to know how the different societies were organised. Moreover, the Commission was asked to give its opinion on the precepts that should be imposed on the societies and what legal benefits could be granted. Immediately arose the question on associations' sustainability and the need to regulate them, especially those establishing pensions for members in the case of old age or their families after their death. Finally, the need to create specific public oversight and arbitration bodies was foreseen¹⁰.

The commission report attempted to answer these questions, analysing the norms and functioning of 135 associations in seven districts and the experience of public policies across borders. The scrutiny conducted may be divided into two sections: a diagnosis of the movement and the guidelines for public policy. Concerning the experience accumulated in the period since mutualist associations first appeared, the diagnosis was not auspicious. A significant part of them struggled with severe difficulties, and those that presented positive balances and capitalised funds were almost always due to extraordinary revenues. According to the commissioners, the fact that the associations were not organised under scientifically studied bases was the cause of their ruin. The bases adopted for dues calculation were hypothetical or null and repeated in many societies, thus multiplying the organisational defects. These calculations were particularly erroneous about the average length of pensions. The Commission recommended that the associations should submit their bylaws to previous government approval, and the State should create tax exemptions and other benefits only for associations following

9. The newspaper *The Federation* published between October 1865 and February 1866 the names, public or associative positions of the delegates to the weekly sessions of the congress.

10. Decree appointing a commission of inquiry to mutual aid associations and indicating the points on which the inquiry of November 22, 1866, Royal Legislation, Book 1866 must address.

scientific precepts of sustainability. It was also argued that these societies should renounce to assure pensions in old age or survivorship cases¹¹.

Twenty years later, new official statistics on mutual aid associations were carried out, and the need to regulate the movement was recognised. According to the report, the number of mutual aid associations had increased in previous years, mainly those whose purpose was to help members with illness or accidental inability to work. However, the intervention of the public administration limited itself to the statute's approval. It was then considered necessary to verify the benefits resulting from this situation to take advantage of past lessons, "from our and others' experience", and the indications of scientific works, thus mitigating the precarious financial situation with which part of these associations struggled. It was intended to understand the causes of "decay of some and the prosperity of others", as well as to calculate the average mortality and illness of members, thus enabling an approximation to the bases that should be adopted to establish membership fees¹². The responses to the 1880 survey already allow for a broader statistical analysis¹³, continuing to reveal the precarious balance between income and expenditure in most societies. Nonetheless, at this point, capitalised values already had a relative weight in the movement¹⁴.

Meanwhile, Costa Goodolphim carried out the first general census and characterisation of existing associations in Portugal, published in his famous work *A Associação*, from 1876. This survey shows that in the penultimate quarter of the 19th century, mutual aid associations proliferated significantly and spread throughout the territory, even though most were concentrated in the two main cities. Goodolphim argued that "mutual aid associations are the ones that should most directly call our attention and to which a more serious and certain study can be applied because their 30-year existence provides us with enough data to know if they are developing good or bad". However, the author warns again to the unsustainability threat, arguing that:

The first defect of these associations is the astonishing number of benefits offered to members, which are not in harmony with the quota required. Most of the Montepios provide medical, pharmacy and pecuniary aid in the event of illness; Disability assistance; burial, pension for widows, and some even for orphans, and a certain amount for mourning. In exchange for so many guarantees, the partner is asked for a small share

(Goodolphim, 1876: 187)

At the same time, the growing government and literate elites' attention to the mutualist movement contributed to its articulation and politicisation. The so-called First Congress of Portuguese Associations brought together 150 associations. It gave rise to a permanent coun-

11. *Government Gazette*, March 31, 1869.

12. Decree of December 2, 1886 opening in the Ministry of Public Works, Commerce and Industry an inquiry into the country's mutual aid associations, *Royal Legislation*, Book 1886.

13. The associations of Aveiro (1), Beja (5), Braga (6), Bragança (1), Castelo Branco (3), Coimbra (4), Guarda (1), Leiria (8), Lisbon (87) responded, Évora (6), Faro (11), Portalegre (4), Porto (61), Santarém (10), Vila Real (5), Viana do Castelo (4), Viseu (5), Azores (7) and Madeira (5).

14. Questionnaire addressed to mutual aid societies ordered by decree of July 17, 1880 (1880-1881). BAHMOP DGCI-RCI-1S.

cil of associations in charge of organising future congresses¹⁵. In the subsequent national meetings, repeated annually until 1885, an attempt was made to deepen the debates started in 1865-1866 and address a set of new issues. The relationship of associations with the State was at the core of the congressmen discussions.

This first debates focused on the movement internal organisation¹⁶, concluding once again for the need for all mutual aid associations existing in the large population centres to form a federation to study, homogenise, and foster economies of scale. The federation should coordinate the associations' annual statistics, with elements provided by the members and formulate a table of quotas and subsidies, to be adopted by all associations, thus standardising the offer and mitigating the harmful effects of competition. The project also suggested that pension funds in disability should form autonomous associations with safe and complete bookkeeping. It finally reaffirmed the need to organise a joint medical and administrative service, including the supply of pharmaceutical and surgical devices to patients¹⁷.

The following year, the statistical Commission presented a map on the Lisbon institutions and a proposal to federate its clinical and administrative services¹⁸. This report was also presented by Costa Goodolphim, as Portugal's official representative at the International Scientific Congresses of Social Security Institutions, organised in Paris on the occasion of the universal exhibition of 1883, summarising the movement's development in that period. Once again, these data called attention to the unavoidable issue of sustainability, arguing that, to enable a serious study on the Portuguese social security institutions, it would be necessary for the statistical national yearbooks to include indispensable data on their lives.

In 1889, Goodolphim presented an up-to-date statistic about the number of mutual aid and class associations, revealing significant progress. In 1883, the same author had counted 295 institutions of this nature. There were already 392 officially recognised mutual-aid associations six years later, bringing together 138870 applicants. This was not a homogeneous development on a national scale, with districts with no association. Among all the partners, only 20% of them were female. The author justified that women, considering the precariousness of their work and specific illnesses, were blamed for the damage caused within the mixed associations. In reality, these latter were open to the unskilled proletariat, and therefore more vulnerable than those reserved for the artisanal aristocracy (Goodolphim, 1889: 111).

15. Board of the Southern Department, *First Congress of Portuguese Associations: held at the Lisbon City Council from 10 to June 18 1882*.

16. *The following issues were expected to be addressed in this discussion: a) Federation of associations to establish shared functions and services; b) Creation of typical associations. Drafting of a law establishing general precepts for associations; c) Reorganisation of statistical data; d) Creation of special associations for disability; e) Creation of a bank of associations; f) Bases of the organisation; g) Means of obtaining houses for associations; h) Creation of an association journal; i) Advertising of associative principles.*

17. Board of the Southern Department, *First Congress of Portuguese Associations: held at the Lisbon City Council from 10 to June 18 1882*.

18. Board of the Department of the South, *Complementary Works of the First Congress of Portuguese Associations held at the Municipality of Lisbon from June 10 to 15th, 1883*.

3. Common strategy and political claims (1891-1910)

From the last decade of the 1800s, the demand for public policies promoting mutualism was prominent within the mutualist debates. In February 1890, on the initiative of the Camões Humanitarian Association, the Congress of Mutual Aid Associations was organised in the session room of the Lisbon City Council. Congressmen claim for a regulatory law, an arbitration court, tax exemptions and State support in the event of an epidemic crisis, considering “mutual aid associations a powerful aid to the less wealthy classes, relieving the State of enormous burdens.”¹⁹. The congress resolutions also recommended more significant public intervention in assistance and social security, with the creation of night doctors’ offices, maintained by the municipalities, to help the poor classes. Relevant to this analysis was also the declaration addressed to the parliament demanding the creation of a tax levied on the imported manufactured and industrial products and the income application on subsidies to the disabled workers.

The congress’s conclusions also called for the executive committee to address the parliament on behalf of all the member associations, asking to create special labour legislation, meeting “the natural demands of the producers’ lives”. The ambition was for this legislation to meet the workers’ main aspirations in regulating labour relations, namely the establishment of an eight-hour working day and weekly rest, the protection of female and child labour, and employers’ accountability for work accidents²⁰.

These claims political impact was noteworthy, as the Decree of February 10, 1890, proves. Promulgated during the same congress, it authorised the government to regulate the organisation of mutual aid associations, to exercise a “beneficial” administrative inspection and to facilitate as much as possible their “development” and “free expansion”. Responding directly to the congressmen demands, the decree points out as guidelines for the demanded legislation that mutual aid associations should be exempted from paying home rent contributions; State should provide public buildings for the associations’ headquarters free of charge; pecuniary aid should be granted to associations in the event of epidemics. The creation of an arbitration court was also foreseen to regulate the issues of mutual aid associations, with arbitrators elected within the associations. The same decree finally predicted the regulation of minors and women working in industrial establishments and hygiene and safety in the workshops²¹.

Moreover, the government asked for the congress to elect a five-member committee to assist the official Commission in charge of carrying out these regulations²². In March, the Minister of Public Works invited the elected Commission to present the bills projects on mutual aid associations and regulate work for women and minors. The Commission did not fail to remember the

19. “The Congress of Mutual Aid Associations”, *The Protest: Socialist periodical*, February 2, 1890.

20. “Congress of Mutual Aid Associations”, *The Protest: socialist periodical*, February 9, 1890.

21. “Government measures”, *The Protest: Socialist periodical*, February 16, 1890.

22. “Montepios”, *The Protest: Socialist periodical*, February 16, 1890.

other congress demands, such as the eight-hour day. However, the minister declared that the projects could only be definitively elaborated after the resolutions of the Berlin congress were known²³. This process was part of a broader trend at an international scale of increasing State intervention in the economic and social spheres, with the intergovernmental conference held in Berlin in 1890 being the first international meeting on labour legislation (Rueschemeyer & Skocpol, 2017).

At the dawn of the 20th century, official studies on mutualism development were deepened, stressing once again the movement's precarious sustainability. The inquiries were territorially circumscribed, taking on more critical detail. In 1901, the Lisbon district was examined, in 1904, Porto district and, in 1907, Braga, Viana, Vila Real and Bragança districts. The survey on Lisbon mutualism was carried out based on questionnaires sent to all associations, which were later validated with visits to the association's headquarters by the Department of Commerce employees. According to the study coordinator, "as a general summary, deduced from the completion of the questionnaire, seized my mind the conviction that not based on scientific grounds for mutual assistance, the life of all existing associations is fictitious". The same public servant argued that "the lack of uniformity in the writing method; the absence of complete scientific basis (tables of morbidity and mortality); the successive reforms of statutes, etc., are enough factors to conclude that it is urgent to modify the current legislation that governs such institutions". Once again, this report reveals a growing concern with the institutions' sustainability and the advocacy for the adjustment of quota and contribution regimes²⁴. The Porto district analysis on 79 associations emphasised that many of them fulfilled their commitments with difficulty due to the large amount of aid granted and the small value of quotas²⁵. This view was also present in the study published in 1907 on Braga, Viana, Vila Real and Bragança²⁶.

At the same time, the mutualist associations implemented the long-debated strategy to mitigate the threat of unsustainability, the creation of mutualist Leagues. The main resolution of the September 1904 Porto Congress was the implementation of common pharmacies²⁷. The associations participating in this assembly decided to organise with their pecuniary reserves the League of Mutual Aid Associations of Porto, opening four pharmacies in the city most popular areas on June 1 1906²⁸. Twenty-six associations from Porto joined the new institution, and in 1908 there were already 30 members and five auxiliary members. The following year, the directive-board reported "with the help of dedicated friends of this league it was possible to establish medical offices at the league headquarters and in the branch pharmacies, which is of

23. *The Protest: Socialist periodical*, March 30, 1890.

24. *Ministry of Public Works, Commerce and Industry, Industrial Labor Office, Social Economy: Charitable Institutions and Welfare Associations of the District of Lisbon*.

25. *Ministry of Public Works, Commerce and Industry, Industrial Labor Office, Social Economy: Charitable Institutions and Welfare Associations of the District of Porto*.

26. *Ministry of Public Works, Commerce and Industry, Industrial Labor Division, Social Economy: Charitable Institutions and Welfare Associations in Braga, Viana, Vila Real and Bragança*.

27. *FNASM Bulletin*, August 1915.

28. *Representation of the mutual aid associations of Porto, Coimbra and Gaia to the minister of promotion, A Voz do Operário*, May 14, 1911, p1

high convenience not only for the league but also for its members, who will thus avoid having to look for a doctor in one place and have their prescriptions filled in another ". It was also an aspiration of the league to organise a clinical service for the affiliated associations - "in fact the clinical service of the mutual aid associations, as it is set up, does not correspond in any way to what it should be expected for the benefit of the members and of the association's revenues"²⁹.

Vila Nova de Gaia associations also endeavoured to create their League facing the resistance of pharmaceutical traders. According to the newspaper *Voz do Operário* (workers' voice), the pharmaceutical class tried by all means to prevent the approval of their statutes, which, however, were approved in May 1906 and experienced frank progress in the following years, gathering six local associations. In July 1910, the League inaugurated its new headquarters building, including a pharmacy, offices and savings bank, and rooms for family meetings, assemblies or conferences³⁰.

The purpose of these institutions was to create an economy of scale that would allow the profitability of common-pooled resources. In 1911, in a representation addressed to the Minister of Development, it was stressed:

The league has six years of existence, and although it does not yet have the concurrence of all the associations, nor the sales of medicines even reached half of the importance that the associations of Porto employ in medicines, it is proven by the benefits obtained to this date that, with the League formation was strongly reduced a formidable waste that the poor and weak associations were making to the detriment of their members, mostly workers, with no other resource when sick or disabled, if not the help that associations provide³¹.

Despite this effort to reduce the associations' costs, mutualists were increasingly convinced that state interference was imperative to cover certain risks. The representation addressed to the Minister of Public Works by the executive committee of the 1906 Lisbon Congress summarises the mutualists' most urgent recommendations. First, it called for a "deep, complete and true" survey by an officially appointed commission. It should study the inner life of mutual aid associations throughout the country, by districts or councils, identifying those that should be merged to meet their objectives fully due to their small size. It was also intended to identify those associations that were unable to maintain their commitments due to their financial imbalance, which required, in the congressmen opinion, their dissolution and the equitable distribution of their members among other associations. Finally, it was hoped that this survey contributed to draft a new law for mutual-aid institutions, taking into account the votes of the associative congresses, which included a set of practical recommendations to ensure sustainability and supervision of mutual societies³².

29. *League of Mutual Aid Associations of Porto, Directors' Report and opinion of the Supervisory Board about the 1907 management (version published in 1908).*

30. "The mutualist associations and the pharmacy leagues", *A Voz do Operário*, 3 July 1910, p1.

31. *Representation of the mutual aid associations of Porto, Coimbra and Gaia to the Minister of Promotion, A Voz do Operário*, May 14 1911.

32. "Mutualist Congress", *Vanguard*, 11 and 12 September 1906.

The deepening of international relations also marked the first decade of the 20th century, being Portugal represented in the International Congresses of Mutuality since the second edition, in Liège 1905. The central debate in these international forums was between the defence of an individual and free welfare system, keeping the principle of freedom, or the adhesion to the German example of a compulsory system. The evolution was toward the principle of compulsion and state subventions, as revealed in the final report of Mabillean, leader of the international federation at the Fourth Congress, in Roubaix 1911:

Je suis forcé de vous rappeler que je suis, comme mes amis, un homme de liberté, épris de liberté, croyant que l'action privée a plus de valeur qu'une contrainte légale, mais après vous avoir dit cela, j'ajoute que le problème tout entier des assurances sociales doit reposer sur une loi d'obligation. Et l'acceptation de cette obligation est reconnaissance du devoir commun, du devoir absolu, et la liberté que se refuserait à ce devoir ne serait plus respectable (...) Mais la liberté entraîne avec elle les avantages de la gestion directe. Et si vous avez le droit d'exiger de nous adhérons au système d'Etat que intéresse la société tout entière, et moi tout le premier, vous me devez le moyen de placer mes économies prélevées sur mon travail, de façon que je puisse en suivre le cours et me permettre comme je pourrais le faire moi-même, de l'employer à améliorer ma condition sociale dans le sens que me paraîtra le meilleur à la fois pour moi, pour la patrie et l'humanité³³

The inability of the mutual-aid movement to cover risks such as long-term illness or disability was at the heart of national and international debates. At the International Congress of Roubaix 1911, several national models were presented, concluding that the State should be held responsible and a public system organised through legally approved mutual funds, as provided for in the French law of April 5, 1910, on pensions. Mutualists also argue that making associations responsible for the security system administration was the best guarantee of effectiveness, oversight and stakeholders' participation³⁴.

33. "I am prompted to recall that, like my friends, I am a man of liberty, who loves liberty, who believes that private action has more value than a legal constraint. However, having said this, I add that social insurance must be enshrined in an obligatory law. Moreover, accepting that obligation is the recognition of common duty, absolute duty, and the freedom that would be denied to that duty would no longer be respectable. Nevertheless, freedom brings with it the advantages of direct management. If we are required to follow the state system in the interests of society as a whole, and in our own first and foremost, we must have the means to improve our social situation, to benefit each one of us, the country and humanity. Cit. de IVe Congrès international de la mutualité tenu à Roubaix du 19 au 22 octobre 1911: *compte-rendu des travaux*, 383-384.

34. IVe Congrès international de la mutualité tenu à Roubaix du 19 au 22 octobre 1911: *compte-rendu des travaux*.

4. Consensus building and the enforcement of public welfare (1910-1926)

With the Republic implementation in 1910, the political trend that had most influenced and mobilised mutualists reached political power. Presided over by the first President of the Portuguese Republic, Teófilo Braga, and with the participation of various new executive members, the National Mutualist Congress in 1911 took on an almost official character. Álvaro Garrido and David Pereira argue that, in the republican period, the significant advances in social reform resulted from proposals transmitted by the mutualist movement due to the intense cooperation and overlap between the republican and mutualist political leaderships (Garrido & Pereira, 2018).

These congress resolutions were the corollary of all the scrutiny and discussion developed since the mutualism emergence, also meeting international trends. Congressmen call for the creation disability and pension funds, with compulsory contributions, management intermediated by the associations, state and employer subsidies. It is worth highlighting that, despite explicitly demanding state intervention, mutualists did not neglect democratic control by free mutual societies. They proposed the creation of elected commissions to manage the insurance funds and of a “general council, which shall be responsible for the preparation of all social legislation and the direct supervision of its enforcement”. They did not fail to emphasise the need to respect “the good principles of a pure and healthy democracy” and thus the obligation that “the officials who will supervise this general board be appointed on the nomination of the mutual aid associations and the trade union federations.”³⁵

Finally, of note is the foundation of the National Federation of Mutual Aid Associations (FNASM), destined to promote all rights concerning the federated associations and the study of “all questions of interest to mutuality in our country”. Teófilo Braga, President of the provisional government of the Republic, Bernardino Machado, Minister of Foreign Affairs, Colonel António Xavier Correia Barreto, Minister of War, and Manuel Brito Camacho, Minister of Development, were acclaimed as honorary presidents and members. In addition to an Executive Committee. Two regional committees were created in Lisbon and Porto³⁶.

The federation was assumed as the mutual-aid associations’ representative next to the State, with an existence deeply linked to the republican social doctrine and policies. This process was extraordinarily accelerated during and after the Great War. Throughout Europe, state intervention in the economic and social sphere profoundly changed the character of voluntary associations. Gradually, government recognition and interference boosted and encouraged the strengthening of the mutualist movement. Welfare societies began to be responsible and inte-

35. *First National Congress of Mutuality: report, theses, minutes of sessions and documents*, p. 532.

36. *Ibidem*.

grated into the national social security systems, becoming more formal and acquiring a new dimension. As Gibaud has long argued, mutualism reinforced its role and social base because of the complementary position in the construction of European welfare states (Gibaud, 2008).

In 1916 the Ministry of Labour and Social Welfare was created in Portugal. Several mutualist leaders were co-opted, and the National Welfare Council, where the federation, had a seat. In the same year, the federation organised a national congress, attended by the President of the Republic, the Ministers of Labour and Social Welfare and the Interior, the Civil Governor of Lisbon and several representatives of the President of the Ministry, the Ministers of Finance, Instruction, Justice, War, Navy and Foreigners, councillors of the Lisbon City Council, senators and deputies³⁷.

The mutualist congress openly defended State direct intervention in the sphere of mutual help through mutualist associations, arguing once again with examples from abroad: “such associations do not receive the slightest financial subsidy from the State, and have not hitherto been protected, as they are in all cultured countries, who spend enormous sums on social welfare institutions. It is estimated that 700 million francs are the minimum official credits inscribed in the various European budgets. It has been intended to implement the various chapters of official legislation, strengthening mutualism and creating social insurance against sickness, invalidity, old age and survival (...). This is the reason for the inclusion in the Ministry of Labour and Social Welfare budget the necessary amount for invalidity and retirement pensions”³⁸.

At this congress, the memoir “The Creation of the Compulsory Social Security” was presented, announcing the law of May 1919. In line with the 1911 congress, the project previewed the principle of direct management through mutual aid associations and employers and public subventions. In other words, mutualists, nationally and internationally, accepted and defended state intervention in social security as long as the system’s administration remained in the associative sphere. Presented by the congressman and deputy Manuel José da Silva, it met the evolution of international doctrine:

*He who draws this line is not one of the most passionate partisans of State providence. On the contrary, in his opinion, State’s action can only be guided by the capitalist and bureaucratic conveniences that predominate. Is only guided otherwise if the currents of popular opinion, by their conscience and strength, can weigh more than the opposing force and provide the means for the implementation of measures of great progress, of advanced social scope*³⁹.

As known, the question of industrial workers social protection merited the attention of Western states immediately after the war. As a result, the Peace Treaty imposed on the International Labour Organisation the task to improve living conditions involving “injustice and

37. “National Mutual Congress”, *Social Security Bulletin*, October to December 1916.

38. *National Mutual Society Congress, Bulletin of the National Federation of Mutual Aid Associations, National Mutual Society Congress, October and November 1916.*

39. *National Mutual Society Congress, Bulletin of the National Federation of Mutual Aid Associations, National Mutual Society Congress, December 1916.*

deprivation for a large number of people” and listed some of the risks that should be covered by social insurance: “the workers’ protection against sickness, accidents and invalidity arising out of his employment; (...) provision for old age and invalidity”. As a result, public social insurance systems were built up or strengthened all over Europe⁴⁰.

In Portugal, compulsory social security became law in May 1919, covering illness and disability, accidents at work, old age and survival. The *Instituto de Seguro Social Obrigatório e Previdência Geral*- ISSOPG (Compulsory Social Insurance and General Providence Institute) was created, the work accidents insurance coverage was extended, and the social work grants implemented. The ISSOPG had as its first mission the propaganda of social security among mutual societies since the law aimed to complete the coverage of free mutualism, which was to take a prominent position in the compulsory regime (Garrido & Pereira, 2018). This propaganda was intended to convert free into compulsory mutual societies and create new associations in the municipalities where these did not exist. The latter were to be created based on civic mobilisation through the creation of local commissions⁴¹.

Although historiography has highlighted the resistance of free mutualism, proud of its autonomy (Garrido & Pereira, 2018), empirical sources indicate otherwise. For example, the minutes of the ISSOPG directors board revealed that the initial mistrust had faded: “at first there was reluctance on the part of the free mutual societies to accept the system of compulsory insurance, but now only the unscrupulous ones disagree with it”⁴². However, the most eloquent proof of mutualism commitment with a public social security system was their resistance to the project suspension under the dictatorship. Moreover, was exactly in the post-war years that mutualism reached its peak, with more than 600.000 members all over the country.

5. Reaction and resistance (1926-1934)

As has been argued in recent theses, the mobilisation of the employers’ associations hindered the implementation of post-war social policies from the outset. The Portuguese Industrial Association condemned the “exuberant and brand new legislation on social insurance” for “constituting enormous tax burdens resulting in part from the costly organisation”, calling for a boycott of the election of delegates to the Supreme Council for Social Security. ISSOPG action was also denigrated in the media, with the slander that the institute was subsidised with funds from the free mutual societies (M.H. Pereira, 2012). In the Portuguese Commercial and Industrial Associations’ Congress of 1923, the implementation of obligatory social insurance was criticised, and the demands for reducing state expenditure by the future dictator Oliveira Salazar stood out (Pereira, 2021).

40. Acts of the International Labour Conferences available at: <https://labordoc.ilo.org/>

41. ANTT, Minutes Books of the Board of Directors of the ISSOPG, 1919. Box 7, book 1.

42. Minutes of January 12 1922 (Cardoso & Rocha, 2009).

The military coup of 1926 signified the inflexion of the long-lasting process, during which the experiences, debates, and proposals of mutualists and social reformers allowed the consensus-building on public social welfare. Oliveira Salazar entrance into the Ministry of Finance in April 1928 profoundly changed the evolution of the compulsory social insurance regime. The future dictator immediately ordered the suspension of the ongoing legislative reform, which envisaged its continuity and updating. At the same time, the new rulers publicised the unsustainability of the republican providential regime (Garrido & Pereira, 2018). In the 1930s, changes in the mutual societies legal framework also began, with the Decree 19.281 of January 29 1931. The new requirements on minimum membership and contributions determined severe problems for the survival of small associations and drove away the most disadvantaged members⁴³.

Mutualists' resistance occurred at different levels within the state apparatus, in the public sphere, and organisations. With the parliament closed and freedoms curtailed, civic participation was limited, but the mutualist Francisco Grilo defended his compulsory social insurance project in the *Boletim de Providência Social* (Social Providence Bulletin), ISSOPG's organ. He argued that, contrary to conservative propaganda, "if the necessary measures already elaborated were promulgated, modifying the text of insurance in illness, these services could easily be carried out without any burden for the State, as our legislation was made bearing in mind that being the State poor it could not be charged with this insurance, contrary to what happens in all nations where the State participates to a greater or lesser extent with employers and workers". The social reformers' arguments were based on statistical demonstration on the ongoing regime of cooperation with the mutual societies, and argued that the 1919 decree and subsequent revisions foresaw an "intimate connection with the exercise of mutuality, already rooted by tradition and by its prestige, mainly in the cities of Lisbon and Oporto"⁴⁴.

In the 1930s, as mutualists defended the suspended project, the corporate regime was designed by the Decree 23.053 of 1933, creating the Instituto Nacional do Trabalho e Providência (National Institute of Labour and Providence) and extinguishing the ISSOPG. The new regime not only neglected the cooperation with the mutual societies in the implementation of a social insurance system, as it subjected them to the tutelage of the new institute and to a new tax on their income to pay the costs of the arbitration courts⁴⁵.

This scheme was widely criticised, considering "the incalculable and irremediable damage its execution would cause". In a representation addressed to the undersecretary of State for corporations and social security, the National Federation of Mutual Aid Associations demanded the revocation of the provisions of article 41, providing for the taxation of mutualist institutions. The mutualist leaders allege the movement's popular roots and public utility, sparing the State of more significant investment in assistance. They also underline the activists' dedication and voluntary work, the difficulties of the associative members, mainly from the less wealthy

43. "General Assembly of December 20", *The Legacy of the Alentejo Salesman*, December 1932, p2.

44. *Exposure on the services of the Compulsory Social Insurance Institute*, *Social Security Bulletin*, No 19 (January to July 1928), p8-12.

45. *Government Gazette*, September 23 1933.

classes, and, finally, the “legitimacy of the rights that the mutualist associations have acquired, independently of any pecuniary aid from the State, a legitimacy that has always been recognised by the governments.”⁴⁶. At the same time, the associations also tried to resist in the legal sphere, with different conflicts being reported between the mutual societies and the Contest Tribunal for Contributions and Taxes on the decree interpretation⁴⁷.

However, the most exuberant expression of mutualism resistance was the movement’s unprecedented mobilisation during the Mutualist Week of January 1933 proposed by the newspaper *O Século*. Hundreds of activists worked on the programme, and 112 institutions were involved. Around 150 solemn sessions, conferences, and ceremonies were organized throughout the country, as well as radio broadcasts and short films in the cinema. Popular support through parades and the broad participation of the democratic intelligentsia even imposed government participation, albeit contained (Garrido & Pereira, 2018).

It may be hypothesised that this demonstration of strength and social support, not only by the people but also by the elites, imposed some caution on the new government about the mutualist movement. Teotónio Pereira, head of the new National Institute of Corporate Welfare, months later left open the possibility of integrating mutual societies in the new order: “Our social welfare problems cannot be solved by doctrinal suggestions nor by imitation of others. However, objectively, seeking to integrate into the corporate movement that will begin all that is good in our private initiatives, such as in our popular mutualism, sometimes so interesting”⁴⁸.

However, and against the corporative ambitions, what stood out in this mobilisation process was the open defence of the republican project of compulsory social insurance, as illustrated in the survey on mutual societies opinion launched by *O Século* in October 1932⁴⁹. Furthermore, these newspaper reports reveal that the advocacy of compulsory social insurance was the leitmotif of most initiatives and conferences organised during Mutualism Week⁵⁰. Among the propagandists invited were its official defenders, such as Francisco Grilo⁵¹.

Taking advantage of the Mutualist Week, the League of Mutual Aid Associations of Porto organised a meeting to vote on the movement’s general claims. The resolutions defended “compulsory enrolment of all valid individuals and within the age established by law, in the mutualist associations; the recognition of the mutualist associations as institutions of public utility; the abolition of all taxes from the State and administrative corporations which encumber the income and expenditure of the associations, as well as the exemption from other charges on their income”⁵². These proposals do not differ substantially from the general complaints sum-

46. *Mutualism, Popular Mutuality, May 1934, p2.*

47. *Popular mutuality, several issues during 1935.*

48. *Speech at the S. Carlos Theatre, 5 June 1933 quoted by Álvaro Garrido and David Pereira (2018), ‘The institutionalisation of the “social” in the Portuguese Estado Novo: corporate welfare and voluntary social insurance.’ Estudos Históricos, vol 31, no 64, pp. 197-218, May-August 2018.*

49. *“Mutualism Week”, The Century, 21 and 26 October 1932, p1.*

50. *“Still the Mutualist Week”, The Legacy of the Alentejo Salesman, No 3 (February 1933), p2.*

51. *“Mutualism and Social Insurance”, A Providência Portuguesa, April 1933, p1-3.*

52. *“Main meeting of the mutual associations in Oporto: several complaints and recommendations are approved”, Popular Mutuality, April 1933, p2.*

marised by the Commission elected in the Mutualism Week, charged with presenting to the Minister of Finance, the aspirations of the country's Mutual Associations⁵³.

This mobilisation process culminated in the III Mutualist Congress of December 1934, in which 206 associations participated. As Álvaro Garrido and David Pereira point out, the congress peremptorily refused corporate welfare as a single and imperative social security system (Garrido & Pereira, 2018). On the contrary, the mutualists demanded “compulsory insurance in Portugal, covering the various forms of providence,” i.e. protection for “illness, old age, invalidity and unemployment (...) with the financial participation of the state, the municipalities, capital and employers”. The congressmen also defended the establishment of a Superior Welfare Council, with study and consultation functions, which besides civil servants would integrate “representatives of the interested bodies, elected by the various types of welfare institutions”⁵⁴.

6. Conclusion

This article intended to illustrate the long-lasting process that ensured the design and implementation of the first social security projects, highlighting the agency of mutualist experiences, debates, and proposals. Although this is a classic theme across borders, in Portugal, the mobilisation and political intervention of the mutualist movement continues to be undervalued, with doubts persisting as to its adherence to the Republican social policies. This is the legacy of efficient propaganda during the dictatorship, which opposed the developing model of universal social security with a fragmented and assistance-based social policy.

Nevertheless, the present long-term analysis illustrates a clear relationship between social mobilisation and public initiatives in the social insurance sphere, which develops in four stages. In the first period, the mutualist movement functioned as a laboratory of experimentation, observation and statistical enquiry, sustaining the conviction that state intervention was needed in the associations' regulation, imposing rational management and ensuring the balance between members' contributions and benefits. Including associative leaders, academics, and politicians, mutualism was a privileged space for discussing and outlining social reforms in the national context. Finally, the mobilisation and concertation of these social actors were significant and impactful, outside and within the state apparatus, promoting new governmental interest in social security.

In a second period, the on-going mutualist experience showed the unsustainability threat handling long-lasting aid, as evidenced by the consecutive surveys and studies promoted by the State with the collaboration of mutualist activists. Based on these experiences and analysis, the idea of the State role as simple regulator and arbitrator evolved towards more effective public intervention in this sphere. Furthermore, during this period, international contacts

53. *Mutualist Claims*”, *Mutualidad Popular*, May 1933, p2.

54. *“III National Congress of Mutuality: Final Vows”*, *Legacy of the Alentejo Chamberlain*, no 33 (August 1935), p3.

were strengthened. So was the knowledge on cross-border experiences, among which all saw the German compulsory model as the most effective to cover risks beyond the reach of private initiatives, such as disability or old age.

The Republican revolution of 1910 brought these proposals to the centre of political debate and ensured the implementation of the most significant proposals. The creation of the Ministry of Labour and Social Welfare and the enactment of the compulsory social insurance system was advocated from the outset and turned into law, ensuring the associations' integration and compulsory mutuality. The First World War accelerated this process and promoted international consensus, with the International Labour Organisation defending the generalisation of public social security systems.

The conservative reaction, which was at the root of 20th-century European dictatorships, as Angel Smith (Smith, 2007) argues, was directed against the labour movement and the social reforms implemented by the post-war governments. However, the institutions, actors, and networks linked to mutualism offered much resistance to these projects suspension, showing their faithfulness in State responsibility in the sphere of social welfare once again and unequivocally.

Recent literature on the role of mutualism in the construction of welfare states shows that this debate is far from over, and there are still critical gaps. Concerning southern countries, marked by a specific trajectory, the historiography and chronologies designed to describe this process focus mainly on public initiatives, relegating to the background the social initiatives "from below", which preceded and supported the first social legislation (Minesso, 2018). This tendency tends to obscure the whole process of experimentation, enquiry and debate around the first mutualist experiments, from the mid-nineteenth century onwards, and thus the long-lasting and continuous social mobilisation in these social policies defence, as well as the reasons for their ideological evolution towards the acceptance of compulsory social insurance. In the same way, the tendency to privilege state action overshadows popular resistance against the conservative reaction.

Through the review and collation of new empirical evidence, it was possible to clarify the dynamics of experimentation and inquiry, knowledge circulation and institutionalisation, social and political mobilisation, which were at the origin of modern social policies. Furthermore, this evidence shows that the mutualist associations and their activists played a central role in this process from the early movement until 1934, when the new corporative and welfare regime definitively came into force.

Acknowledgments: I thank my colleague Ricardo Noronha for the suggestions that contributed to the preparation of the final version of this article.

Finance: Study funded by the Foundation for Science and Technology under the Scientific Employment Contract (CEECIND/00764/2017).

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