

WHO IS MORE DESERVING OF WELFARE IN PORTUGAL?

Moral criteria and public perceptions

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Abstract Public perceptions of welfare deservingness are central to welfare legitimacy. Drawing on the CARIN framework, this article examines how deservingness criteria are structured in Portugal, a Southern European welfare regime underrepresented in comparative research. Using survey data from 1056 adults, the CARIN scale was adapted to Portuguese and analysed through confirmatory factor analysis. Results supported the five-dimensional structure, with reciprocity and need receiving the strongest endorsement. Men and participants with lower educational attainment showed more restrictive deservingness orientations. These findings could contribute to comparative research on welfare legitimacy in Southern Europe.

Keywords: welfare deservingness, moral criteria, public perceptions, Portugal.

Quem merece mais apoio social em Portugal? Critérios morais e percepções públicas

Resumo As percepções públicas sobre o merecimento do apoio social são centrais para a legitimidade do estado social. Com base no modelo CARIN, este artigo analisa a forma como os critérios de merecimento se estruturam em Portugal, um regime de bem-estar do Sul da Europa ainda pouco representado na investigação comparativa. Utilizando dados de um inquérito a 1056 adultos, a escala CARIN foi adaptada ao contexto português e analisada através de análise fatorial confirmatória. Os resultados sustentam a estrutura pentadimensional da escala, destacando-se a reciprocidade e a necessidade como os critérios mais valorizados. Os homens e os participantes com menores níveis de escolaridade revelaram orientações mais restritivas relativamente ao merecimento. O estudo pode contribuir para a investigação comparativa sobre a legitimidade do estado social no Sul da Europa.

Palavras-chave: merecimento ao apoio social, critérios morais, percepções públicas, Portugal.

Qui mérite le plus l'aide sociale au Portugal? Critères moraux et perceptions publiques

Résumé Les perceptions publiques du mérite en matière d'aide sociale sont centrales pour la légitimité de l'Etat-providence. S'appuyant sur le cadre CARIN, cet article examine la manière dont les critères de mérite sont structurés au Portugal, un régime de protection sociale d'Europe du Sud encore peu représenté dans la recherche comparative. A partir de données d'enquête recueillies auprès de 1056 adultes, l'échelle CARIN a été adaptée au contexte portugais et analysée à l'aide d'une analyse factorielle confirmatoire. Les résultats confirment la structure à cinq dimensions de l'échelle, la réciprocité et le besoin apparaissant comme les critères les plus valorisés. Les hommes et les participants ayant un niveau d'éducation plus faible ont présenté des orientations plus restrictives concernant le mérite. L'étude pourrait contribuer à la recherche comparative sur la légitimité de l'Etat-providence en Europe du Sud.

Mots-clés: mérite de l'aide sociale, critères moraux, perceptions publiques, Portugal.

Quién merece más las prestaciones sociales en Portugal? Criterios morales y percepciones públicas

Resumen Las percepciones públicas sobre el merecimiento de las prestaciones sociales son centrales para la legitimidad del Estado del bienestar. Basándose en el modelo CARIN, este artículo analiza cómo se estructuran los criterios de merecimiento en Portugal, un régimen de bienestar del sur de Europa todavía poco representado en la investigación comparativa. Utilizando datos de una encuesta a 1056 adultos, la escala CARIN fue adaptada al contexto portugués y analizada mediante análisis factorial confirmatorio. Los resultados respaldan la estructura de cinco dimensiones de la escala, destacándose la reciprocidad y la necesidad como los criterios más valorados. Los hombres y los participantes con menores niveles educativos mostraron orientaciones más restrictivas respecto al merecimiento. El estudio podría contribuir a la investigación comparativa sobre la legitimidad del Estado del bienestar en el sur de Europa.

Palabras-clave: merecimiento de las prestaciones sociales, criterios morales, percepciones públicas, Portugal.

Introduction

With the successive economic and political crises affecting both the European Union and, particularly, Portugal, there has been growing concern among social researchers regarding how public opinion in general, and policymakers' opinions in particular, may influence the design of public policies and shape the modern Welfare State model (*e.g.*, Crabtree and Wehde, 2022; Eule, 2024; Knotz *et al.*, 2022; Laenen and Roosma, 2022).

Welfare deservingness can be defined as the set of moral and normative criteria through which individuals evaluate the legitimacy of welfare provision to different target groups and, implicitly, rank claimants according to perceived worthiness (*e.g.*, Heuer and Zimmermann, 2020; Przybylska, 2021; van Oorschot, 2000). These evaluations are not merely reflections of economic rationality or policy knowledge but are underpinned by deeply embedded social representations, cultural norms, and value orientations that shape how citizens perceive poverty, need, and entitlement (Laenen, 2020).

The importance of deservingness perceptions lies in their dual role: on the one hand, they influence the political feasibility and public legitimacy of redistributive policies; on the other, they contribute to the reproduction of social inequalities by reinforcing hierarchies of worthiness between social groups and categories of welfare recipients (Eule, 2024; Laenen and Roosma, 2022). In this sense, deservingness beliefs function as "cognitive shortcuts" (heuristics) that allow individuals to rapidly categorise welfare claimants according to criteria such as control over neediness, past contributions, or social proximity (Petersen, 2012). Consequently, understanding how these perceptions are structured and measured has become an essential endeavour in welfare state literature.

The conceptualisation of deservingness has often been operationalised through the heuristic question: Who should get what, and why? (van Oorschot, 2000). Reformulated from an analytical perspective, this question also raises the issue of who is considered more deserving of welfare support, encapsulating both distributive justice concerns and moral judgments about individual behaviour, identity, and social proximity. Over the past two decades, the study of deservingness has evolved from a

fragmented body of research relying on proxies, such as attitudes toward specific groups, to a more systematic theoretical framework (Laenen and Roosma, 2022). The CARIN model has emerged as the most influential attempt to synthesise these criteria into a coherent structure (van Oorschot and Roosma, 2017).

By focusing on Portugal, the article seeks to contribute to comparative debates on welfare legitimacy and moral evaluations of social support in Southern European welfare regimes. Following this introduction, the article presents the theoretical framework and literature review on welfare deservingness and the CARIN model, followed by the methodological procedures, the empirical results, and a discussion of the main findings and implications.

The CARIN framework: a comprehensive model of welfare deservingness

The CARIN model, initially proposed by van Oorschot (2000), represents the most influential theoretical framework for analysing welfare deservingness as a set of socially shared moral judgements about who is considered entitled to social support. It identifies five moral principles that citizens commonly invoke when evaluating the legitimacy of welfare support: Control, attitude, reciprocity, identity, and need. Each principle reflects a distinct normative dimension of social judgment used to differentiate between more and less deserving groups (figure 1).

The model provides a structured framework for understanding the moral economy underlying public evaluations of welfare claimants, highlighting how judgments about entitlement are shaped by normative expectations rather than solely by policy design. Subsequent empirical studies have consistently shown that these criteria are salient across different European contexts, although their relative importance varies (Knotz *et al.*, 2022; van Oorschot, 2006). For instance, Petersen (2012) demonstrated that perceptions of control strongly predict support for conditional benefits, whereas Laenen (2020) emphasised the role of identity in shaping solidarity toward immigrants, illustrating how deservingness criteria operate as hierarchising mechanisms within welfare attitudes.

Recent studies have further advanced the operationalisation of the CARIN criteria by translating these moral principles into an empirically measurable framework. Meuleman, Roosma and Abts (2020) developed the CARIN Deservingness Principles Scale, which captures the multidimensional structure of the model by grouping items according to the five deservingness principles (CARIN). This development addressed previous conceptual confusion and measurement inconsistencies arising from the use of *ad hoc* items and proxy variables (Meuleman, Roosma and Abts, 2020).

Despite the growing consensus around the CARIN framework, most validations and applications have been conducted in Northern and Western European countries (van Oorschot *et al.*, 2017). This gap underscores the importance of examining whether the model's principles can be meaningfully extended to Southern European welfare regimes, which differ markedly in their institutional and cultural landscapes (Ferrera, 1996; Martins, 2017), and where public perceptions of

Criterion	Description	Example or context
Control	Extent to which individuals are perceived as responsible for their disadvantaged circumstances.	Unemployed people due to structural reasons are seen as more deserving.
Attitude	Claimants' perceived disposition, such as gratitude or motivation to improve their situation.	Whether the person shows effort and appreciation.
Reciprocity	Past or potential future contributions to society.	Employment history, volunteering, or previous social contributions.
Identity	Perceived social proximity to the general public (e.g., nationality or group membership).	Greater deservingness attributed to those sharing national identity.
Need	The objective or subjective severity of claimants' deprivation.	Severe economic need increases perceived deservingness.

Figure 1 Overview of the CARIN criteria

Note: Conceptual definitions based on literature (e.g., Laenen, 2020; Meuleman, Roosma and Abts, 2020; van Oorschot, 2000; van Oorschot and Roosma, 2017).

deservingness may be shaped by specific historical trajectories, levels of social inequality, and welfare state arrangements.

Welfare deservingness in Southern Europe: the case for Portugal

Southern European welfare states present distinct institutional and cultural configurations compared to other European welfare regimes (Ferrera, 1996; Martins, 2017). Characterised by a combination of familism, fragmented social protection schemes, and historically weaker universalism, Southern regimes have been shaped by late industrialisation, strong family networks, and enduring income inequalities (Calado, Capucha and Estêvão, 2019). In Portugal, the welfare state emerged more fully after the 1974 democratic transition, and although it expanded significantly in the late 20th century, it has remained institutionally fragile and socially ambivalent in the face of recurrent economic crises (Calado, Capucha and Estêvão, 2019; Pereirinha and Murteira, 2016).

Research has shown that in countries with fragile welfare systems and public discourses marked by moralisation and conditionality, deservingness perceptions may acquire distinctive patterns (Rubinat, 2020). For example, Silva and Martinez (2015) argued that the austerity measures implemented after the 2008 crisis reinforced paternalistic narratives about dependency and blame. These narratives should not be understood merely as spontaneous public reactions to economic crisis, but also as politically and institutionally mediated constructions that contribute to legitimising restrictive welfare policies and differentiated access to social rights (Capucha *et al.*, 2014; Mahnkopf, 2012). In this regard, public discourses surrounding welfare recipients may reinforce moral distinctions between “deserving” and “undeserving” groups, shaping broader perceptions of social legitimacy and responsibility. In this setting, evaluations of who is considered more deserving of welfare support are likely shaped by tensions between universalistic principles

and culturally embedded expectations of individual responsibility, effort, and reciprocity.

These dynamics suggest that deservingness perceptions in Portugal cannot be understood independently of broader historical, cultural, and policy-specific factors. As Laenen and Roosma (2022) argue, deservingness criteria are socially constructed and context-dependent, reflecting dominant moral frameworks rather than neutral or universal standards. Consequently, the relative salience of different deservingness principles may vary substantially across welfare regimes, particularly between Northern and Southern European contexts characterised by divergent institutional arrangements and social inequalities.

Despite the relevance of these issues, empirical evidence on welfare deservingness in Southern Europe remains limited. To date, most empirical applications and validations of the CARIN framework have been conducted in Northern and Western European countries (van Oorschot *et al.*, 2017), constraining the scope for comparative analysis and limiting our understanding of how specific moral criteria of deservingness operate in underrepresented welfare regimes. The findings of Santos, Caetano and Mónico (2025) reinforce this gap, highlighting the fragmented nature of existing research and the lack of systematic, theory-driven empirical analyses centred on public perceptions of deservingness in Portugal.

Against this background, examining welfare deservingness in Portugal offers a particularly valuable opportunity to assess whether the moral principles identified by the CARIN framework are similarly structured and prioritised in a Southern European welfare state. Rather than assuming the automatic transferability of deservingness criteria across contexts, this study approaches the Portuguese case as sociologically informative in its own right, allowing for a context-sensitive examination of how public perceptions of deservingness are shaped by specific institutional trajectories, social inequalities, and moral economies of welfare.

Method

Participants

The study included a non-probabilistic sample of 1056 Portuguese adults aged between 18 and 98 years ($M = 39.28$, $SD = 16.37$). Regarding gender, 70.0% identified as female, 29.7% as male, and 0.3% as another gender identity. Although the sample is not nationally representative, it included a higher proportion of women and participants with higher educational attainment and household income levels compared with national sociodemographic indicators. Nevertheless, participants were geographically distributed across the country, with the majority residing in the Centre region of Portugal (54.5%).

Marital status was nearly evenly divided between single (44.7%) and married individuals (44.1%), and the average household size was approximately three members ($M = 2.95$, $SD = 1.23$). Educational attainment was relatively high, with 50.4%

holding a higher education degree, 37.2% having completed secondary education, and 12.4% reporting lower educational levels. Employment status was heterogeneous, though most participants were employed (51.1%) or full-time students (24.6%), with smaller proportions self-employed, retired, unemployed, or engaged in domestic work.

The mean monthly net household income was € 2352 ($SD = € 1846$), with 71.0% earning above the national minimum wage (870 €, legal threshold at the time of data collection). Most respondents were not direct beneficiaries of social assistance, with 88% reporting that neither they nor their relatives (83%) had received social benefits in the two years preceding the study.

Concerning the current financial situation, 40.1% indicated having sufficient resources to get by without difficulties, and 42.6% reported just enough to manage. Only a minority indicated significant financial hardship, with 11.4% stating they often struggle to make ends meet. The mean score for FS1 was 2.59 ($SD = 0.77$), indicating a moderate level of perceived financial adequacy overall.

Procedure

Data were collected between April and July 2024 through an online survey disseminated via institutional mailing lists and social networks. Strategies were implemented to ensure data authenticity, including the monitoring of duplicate responses and verifying eligibility criteria.

Participants were provided with detailed information on the study objectives, inclusion criteria, estimated completion time, confidentiality, and anonymity prior to participation. Informed consent was obtained before participation, and respondents could withdraw at any time without penalty. The study protocol was reviewed and approved by the Ethics and Deontology Committee of the Faculty of Psychology and Education Sciences at the University of Coimbra (Approval Code: CEDI/FPCEUC:84/R-3).

Measures

The sociodemographic questionnaire included nine closed-ended items assessing gender, age, marital status, education, employment status, household composition, household income, and receipt of social benefits by participants or their relatives in the preceding two years.

Financial strain was assessed using four items adapted from Meuleman, Roosma and Abts (2020). These items were included to capture both current and anticipated economic vulnerability, which has been shown to shape public evaluations of welfare deservingness. One item measured the current economic situation ("We have just enough to get by"), while three items evaluated anticipated financial difficulties and perceived socioeconomic stability over the next two years (e.g., "Do you think your financial worries will increase in the next two years?"). Responses were recorded on a 5-point Likert scale ranging from 1 (never) to 5 (frequently).

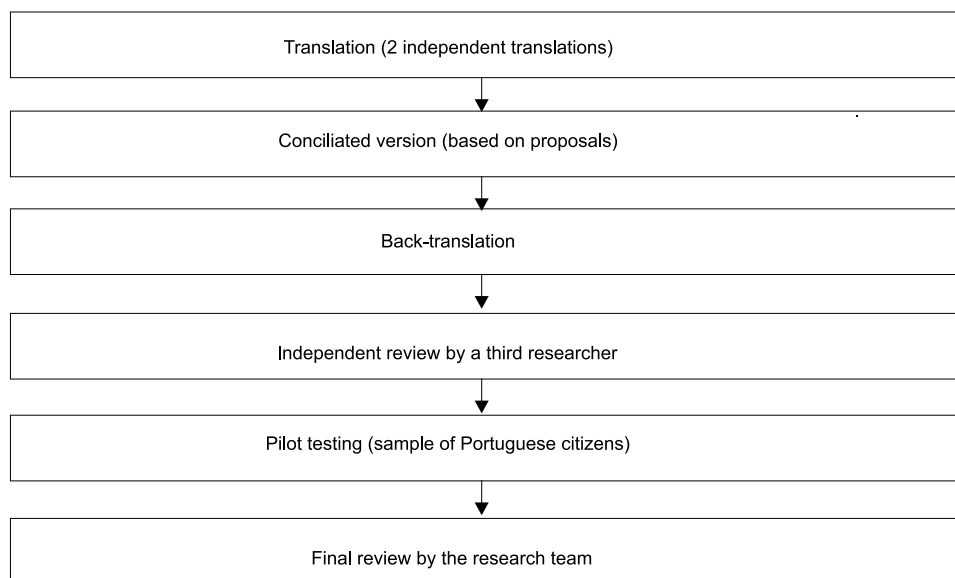


Figure 2 Procedure for the Cross-Cultural Adaptation of the CARIN Scale

Note. Stages of the cross-cultural adaptation of the CARIN scale into European Portuguese, including translation, reconciliation, back-translation, and pilot testing (Alavi, Le Lagadec and Cleary, 2025; Beaton *et al.*, 2000).

The CARIN scale was developed by Meuleman, Roosma and Abts (2020) to operationalise the five moral deservingness criteria that structure public judgements about welfare entitlement. It consists of 13 items grouped according to the five principles: control (2 items), attitude (2 items), reciprocity (3 items), identity (3 items), and need (3 items). Responses are rated on a 5-point Likert scale (1 = strongly disagree, to 5 = strongly agree).

For the present study, the scale was translated and adapted into European Portuguese following established guidelines for cross-cultural adaptation of attitudinal measures. Two bilingual researchers independently translated the items, with attention to cultural nuances and the conceptual specificity of each construct. A consensus version was then established through discussion, incorporating feedback from a third researcher who reviewed the reconciled draft. The reconciled version was back-translated into English and compared with the original to verify semantic equivalence. A preliminary pilot test with five Portuguese adults assessed clarity and cultural adequacy.

Following this process, items 1 and 10 were reverse-coded, and item 13 was removed due to redundancy with item 11. These decisions were theoretically and empirically grounded, ensuring the content validity and linguistic accuracy of the Portuguese version (figure 2).

Statistical analysis

Statistical analyses were conducted using IBM SPSS Statistics (version 28), with the AMOS extension (version 24). Descriptive statistics were computed for all scale items, including means, standard deviations, skewness, and kurtosis, to examine distributional properties and detect potential deviations from normality in respondents' evaluations of welfare deservingness criteria (Field, 2024). Internal consistency reliability was assessed using Cronbach's alpha coefficients to evaluate the coherence of each deservingness dimension.

A Confirmatory Factor Analysis (CFA) was conducted to test the five-factor structure of the CARIN Deservingness Principles Scale, as proposed in earlier studies (Meuleman, Roosma and Abts, 2020), assessing whether the moral criteria underlying welfare deservingness are empirically distinguishable in the Portuguese context. The analysis was performed on the full sample ($N = 1056$) using Maximum Likelihood Estimation. Model fit was assessed through several indices, including the Chi-square statistic (χ^2), the Comparative Fit Index (CFI), the Root Mean Square Error of Approximation (RMSEA), and the Standardised Root Mean Square Residual (SRMR). Following common guidelines (Hu and Bentler, 1999; Marôco, 2021), model fit was considered acceptable when $CFI \geq 0.90$, $RMSEA \leq 0.08$, and $SRMR \leq 0.08$.

Additionally, convergent and discriminant validity were examined through Pearson correlations with sociodemographic variables and related constructs, allowing for an exploratory assessment of how deservingness criteria relate to social position and economic vulnerability. Group differences were analysed using independent-samples t-tests to examine variations in deservingness perceptions across key sociodemographic groups, with statistical significance set at $p < 0.05$.

Results

Item descriptive statistics

Higher scores on the CARIN scale (*e.g.*, responses of "agree" or "strongly agree") correspond to higher levels of agreement with the items. Accordingly, table 1 presents the item-level descriptive statistics, providing an initial overview of how different moral criteria are evaluated within the Portuguese sample.

For the Control criterion (items 1 and 2), the majority of respondents disagree with statements denying support to those considered responsible for their situation (39% and 40%, respectively). Regarding attitude (items 3 and 4), a substantial proportion rejected the notion that beneficiaries should refrain from complaints (item 4: 29% disagree). Within reciprocity (items 5-7), the strongest endorsement was observed for item 7, where 36% selected agree and 26% strongly agree. In the identity criterion (items 8-10), 39% strongly disagreed with restricting access to social services based on parental nationality, while around one-quarter agreed that being born in Portugal should grant priority, and 35% disagreed with denying

Table 1 Descriptive statistics of the CARIN scale items (*N* = 1056)

Item		Median (IQR)	Strongly disagree n (%)	Disagree n (%)	Neither agree nor disagree n (%)	Agree n (%)	Strongly agree n (%)
1	People who fall into poverty because of their own mistakes should not be entitled to a decent minimum income.	2 (1)	159 (15%)	411 (39%)	276 (26%)	141 (13%)	69 (7%)
2	People who are to blame for their problems do not deserve any social support.	2 (2)	284 (27%)	419 (40%)	231 (22%)	100 (10%)	22 (2%)
3	People receiving social support should show more gratitude.	3 (1)	104 (10%)	133 (13%)	342 (32%)	297 (28%)	180 (17%)
4	People who receive minimum income support should be satisfied and should not complain.	3 (2)	218 (21%)	307 (29%)	234 (22%)	205 (19%)	92 (9%)
5	Social benefits should be reserved for those who have contributed to collective prosperity.	3 (2)	163 (15%)	288 (27%)	218 (21%)	268 (25%)	119 (11%)
6	It is unfair for people to receive social benefits when they have not contributed to them.	3 (2)	175 (17%)	313 (30%)	201 (19%)	239 (23%)	128 (12%)
7	People who have worked and contributed in the past deserve better social support than those who have contributed little or nothing.	4 (2)	86 (8%)	151 (14%)	174 (17%)	375 (36%)	270 (26%)
8	Only people whose parents are Portuguese should be entitled to social services and benefits.	2 (2)	414 (39%)	352 (33%)	170 (16%)	80 (8%)	40 (4%)
9	When granting social benefits, people born in Portugal should have priority over those who were not.	3 (2)	258 (24%)	253 (24%)	169 (16%)	260 (25%)	116 (11%)
10	Migrants should not be allowed to enjoy the same services and social support as Portuguese citizens.	4 (2)	202 (19%)	370 (35%)	241 (23%)	156 (15%)	87 (8%)
11	Social benefits should be available only to those who truly live in poverty.	3 (2)	136 (13%)	370 (35%)	185 (18%)	234 (22%)	131 (12%)
12	People with sufficient financial reserves should not receive social benefits.	3 (2)	89 (8%)	259 (25%)	284 (27%)	279 (26%)	145 (14%)

Note. IQR = Interquartile Range.

migrants equal access to social support. Finally, within need (items 11 and 12), responses suggested ambivalence: while 35% disagreed with the statement that social support should only target those “truly living in poverty” (item 11), nearly half expressed agreement with item 12 concerning the exclusion of individuals with sufficient financial reserves.

Across items, the median response was 3, reflecting overall neutrality or moderate agreement/disagreement (table 1).

Item properties and reliability

An examination of the descriptive and psychometric properties of the CARIN items focused on assessing the adequacy of the scale for subsequent analyses and indicated adequate distributional characteristics and satisfactory internal consistency (table 2). All response options were utilised across the scale, and no evidence of floor or ceiling effects was observed. Skewness and kurtosis values were within recommended thresholds ($Sk < 3$; $Ku < 7$), supporting univariate normality (Field, 2024).

Table 2 Item descriptive and psychometric properties of the CARIN scale ($N = 1056$)

Item		Min.–max.	Skewness	Kurtosis	Corrected item-total correlation	Cronbach's Alpha if item deleted
1	People who fall into poverty because of their own mistakes should not be entitled to a decent minimum income.	1–5	0.52	–0.38	0.41	0.85
2	People who are to blame for their problems do not deserve any social support.	1–5	0.64	–0.15	0.52	0.85
3	People receiving social support should show more gratitude.	1–5	–0.33	–0.62	0.65	0.84
4	People who receive minimum income support should be satisfied and should not complain.	1–5	0.28	–0.97	0.63	0.84
5	Social benefits should be reserved for those who have contributed to collective prosperity.	1–5	0.07	–1.11	0.68	0.84
6	It is unfair for people to receive social benefits when they have not contributed to them.	1–5	0.17	–1.12	0.71	0.83
7	People who have worked and contributed in the past deserve better social support than those who have contributed little or nothing.	1–5	–0.61	–0.67	0.61	0.84
8	Only people whose parents are Portuguese should be entitled to social services and benefits.	1–5	0.98	0.26	0.54	0.86
9	When granting social benefits, people born in Portugal should have priority over those who were not.	1–5	0.16	–1.28	0.58	0.84
10	Migrants should not be allowed to enjoy the same services and social support as Portuguese citizens.	1–5	0.47	–0.67	0.38	0.86
11	Social benefits should be available only to those who truly live in poverty.	1–5	0.25	–1.07	0.42	0.85
12	People with sufficient financial reserves should not receive social benefits.	1–5	–0.05	–0.92	0.24	0.86

Table 3 Standardised factor loadings, descriptive statistics, and reliability of the CARIN scale ($N = 1056$)

Item		Control	Attitude	Reciprocity	Identity	Need
1	People who fall into poverty because of their own mistakes should not be entitled to a decent minimum income.	0.54	—	—	—	—
2	People who are to blame for their problems do not deserve any social support.	0.69	—	—	—	—
3	People receiving social support should show more gratitude.	—	0.78	—	—	—
4	People who receive minimum income support should be satisfied and should not complain.	—	0.73	—	—	—
5	Social benefits should be reserved for those who have contributed to collective prosperity.	—	—	0.83	—	—
6	It is unfair for people to receive social benefits when they have not contributed to them.	—	—	0.84	—	—
7	People who have worked and contributed in the past deserve better social support than those who have contributed little or nothing.	—	—	0.69	—	—
8	Only people whose parents are Portuguese should be entitled to social services and benefits.	—	—	—	0.68	—
9	When granting social benefits, people born in Portugal should have priority over those who were not.	—	—	—	0.75	—
10	Migrants should not be allowed to enjoy the same services and social support as Portuguese citizens.	—	—	—	0.52	—
11	Social benefits should be available only to those who truly live in poverty.	—	—	—	—	0.81
12	People with sufficient financial reserves should not receive social benefits.	—	—	—	—	0.49
		M = 2.39 SD = 0.87	M = 2.98 SD = 1.07	M = 3.10 SD = 1.08	M = 2.45 SD = 0.95	M = 2.99 SD = 1.02
Correlations between latent factors		(0.54) ^a				
		0.73	(0.72)			
		0.78	0.85	(0.82)		
		0.66	0.69	0.70	(0.68)	
		0.34	0.53	0.45	0.41	(0.57) ^a

Note. Adjusted model: CFI = 0.95; RMSEA = 0.07; SRMR = 0.04.

^aThe Cronbach's alpha value for this scale may be lower because it consists of only two items. According to Field (2024), when a scale includes only two items, Cronbach's alpha can underestimate reliability, and the inter-item correlation (Pearson's correlation) may be a more appropriate measure of internal consistency.

Corrected item-total correlations were positive and above the recommended minimum ($r = .20$), indicating acceptable item functioning, although item 12 displayed the weakest association ($r = 0.24$). Internal consistency analyses showed that Cronbach's alpha did not substantially increase with the removal of any single item. The majority of inter-item correlations exceeded 0.30, except those involving item 12, which showed comparatively weaker associations.

Confirmatory factor analysis

A Confirmatory Factor Analysis (CFA) was conducted to test the hypothesised five-factor structure of the CARIN model, using Maximum Likelihood

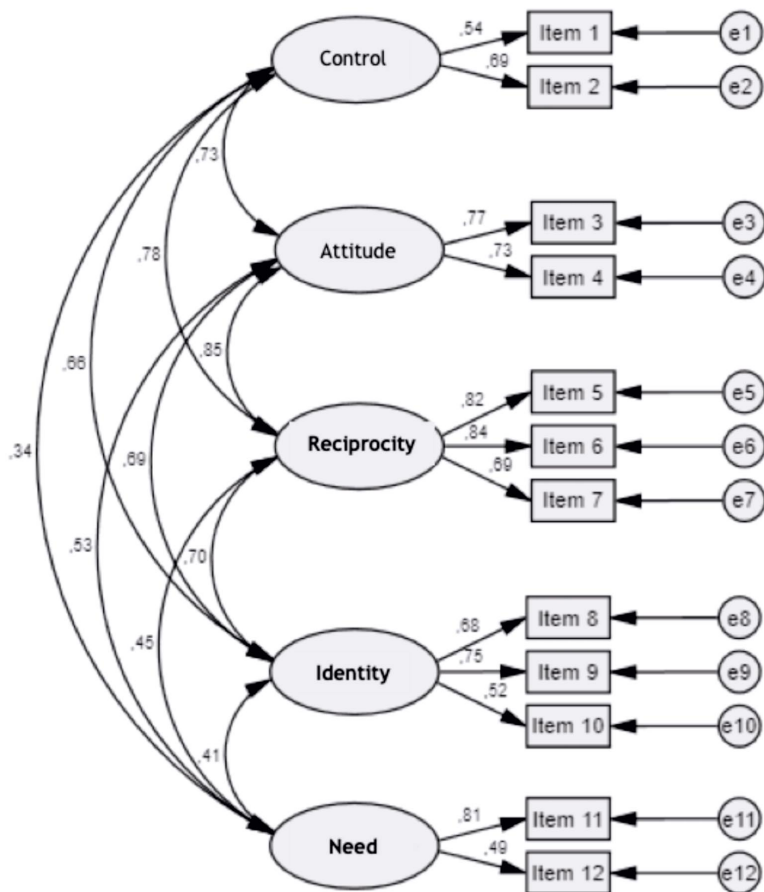


Figure 3 Structural model of the CARIN scale: standardised factor loadings and inter-factor correlations

Note. Authors' elaboration using AMOS (version 24).

Estimation. This analysis aimed to assess whether the theoretical structure proposed in previous studies was empirically supported in the Portuguese sample. The model demonstrated good fit indices: RMSEA = 0.07, CFI = 0.95, and SRMR = 0.04, all within recommended thresholds (Hu and Bentler, 1999; Marôco, 2021).

Descriptive statistics indicated that reciprocity obtained the highest mean score ($M = 3.10$, $SD = 1.08$), followed by need ($M = 2.99$, $SD = 1.02$) and attitude ($M = 2.98$, $SD = 1.07$). Control ($M = 2.39$, $SD = 0.87$) and identity ($M = 2.45$, $SD = 0.95$) presented lower average scores (table 3).

All factor loadings were statistically significant, ranging from 0.49 (item 12) to 0.84 (item 6). Each item loaded on its theoretically specified factor, indicating an adequate representation of the five latent dimensions.

All inter-factor correlations were positive. The strongest was observed between reciprocity and attitude (0.85), followed by reciprocity and control (0.78). By contrast, the need criterion generally showed the weakest associations with the other factors, with inter-factor correlations ranging from 0.34 to 0.53, indicating a comparatively lower degree of association (figure 3).

Additional analyses

Intercorrelations between the CARIN criteria were all positive and, in most cases, moderate to strong (table 4). The strongest association was found between reciprocity and attitude ($r = 0.67$, $p < 0.001$), followed by reciprocity and control ($r = 0.52$, $p < 0.001$). By contrast, need demonstrated weaker correlations with other dimensions (all $r \leq 0.32$), indicating lower levels of association with the remaining criteria.

Correlations with external variables were generally small in magnitude. Age correlated positively with control ($r = 0.15$, $p < 0.001$), attitude ($r = 0.19$, $p < 0.001$), and need ($r = 0.17$, $p < 0.001$). Financial strain was modestly associated with reciprocity ($r = 0.09$, $p = 0.002$) and identity ($r = 0.08$, $p = 0.006$). In terms of policy preferences, support for universal welfare provisions correlated positively with need ($r = 0.22$, $p < 0.001$) and negatively with control ($r = -0.10$, $p = 0.001$), reflecting distinct patterns of association between deservingness criteria and welfare orientations.

Group comparisons by gender and educational attainment are presented in table 5. Independent-samples t -tests indicated that men scored significantly higher on control ($t(1051) = 3.99$, $p < 0.001$), reciprocity ($t(1051) = 4.09$, $p < 0.001$), and attitude ($t(1051) = 4.55$, $p < 0.001$). No significant gender differences were observed for need and identity. Participants without a university degree reported higher scores on control, attitude, reciprocity, and identity, whereas need scores were virtually identical across educational groups.

Table 4 Pearson correlations among CARIN criteria and external variables ($N = 1056$)

	M + SD	Control	Attitude	Reciprocity	Identity	Need
Age	39.28+16.37	0.15**	0.19**	0.07*	0.16**	0.17**
Household income	2352.49+1846.47	-0.03	0.01	-0.01	-0.06	0.03
Financial strain	14.39+2.92	-0.02	0.05	0.09**	0.08**	0.03
Control	2.39+0.87	1				
Attitude	2.98+1.07	0.46**	1			
Reciprocity	3.10+1.08	0.52**	0.67**	1		
Identity	2.45+0.95	0.44**	0.48**	0.53**	1	
Need	2.99+1.02	0.16**	0.37**	0.32**	0.23**	1

Note. M = mean; SD = standard deviation; * $p < 0.05$. ** $p < 0.01$. *** $p < 0.001$.

Table 5 Sociodemographic differences in CARIN criteria ($N = 1056$)

			Control		Attitude		Reciprocity		Identity		Need	
	n	%	M	SD	M	SD	M	SD	M	SD	M	SD
Sex												
Male	314	30	2.55	0.83	3.22	1.01	3.31	1.01	2.53	0.94	3.11	1.04
Female	739	70	2.32	0.88	2.89	1.08	3.02	1.10	2.42	0.95	2.95	1.00
Education												
Without degree	524	50	2.57	0.84	3.20	1.02	3.31	1.01	2.61	0.92	2.99	1.03
With degree	532	50	2.21	0.87	2.77	1.08	2.89	1.12	2.30	0.95	3.00	1.01

Note. n = frequency; M = mean; SD = standard deviation.

Discussion

This study contributes to the sociology of welfare and social policy by examining how moral criteria of deservingness are structured and mobilised in the Portuguese context, drawing on the validation of the CARIN principles scale in a Southern European welfare regime marked by persistent inequalities and institutional fragmentation. By extending the application of the CARIN framework beyond the Northern and Western European contexts where it has been predominantly tested, the study enhances the comparative relevance of deservingness research and addresses a recognised empirical gap (Santos, Caetano and Mónico, 2025).

Moving beyond a solely psychometric focus, the discussion situates the findings within broader debates on welfare legitimacy, moral evaluation, and social stratification, thereby highlighting both convergences with existing European research and patterns that are specific to the Portuguese and Southern European context.

Comparative insights: Portuguese findings in the European context

The findings obtained in the Portuguese sample highlight a distinctive configuration within the hierarchy of deservingness principles, with reciprocity, need, and attitude receiving the strongest endorsement, while control and identity were less strongly supported. This configuration partially reflects patterns identified in European comparative research (van Oorschot, 2006; Larsen, 2008), where solidarity is often grounded in perceptions of contribution and genuine need, while criteria related to identity and personal responsibility tend to be more contested and context-dependent.

The high salience of reciprocity in the Portuguese sample aligns with evidence from Northern and Western Europe, where past or present contributions to society are regarded as key justifications for welfare support (Meuleman, Roosma and Abts, 2020). In the Portuguese context, however, this emphasis may also reflect the historical centrality of contributory principles in a welfare state marked by limited universalism. In contrast, the comparatively weaker endorsement of control suggests a more restrained support for punitive conditionality, echoing findings that in contexts marked by economic vulnerability, individuals are less inclined to deny support on the basis of perceived responsibility (Rubinat, 2020).

Identity-related items received particularly low support, with strong disagreement toward exclusivist statements regarding migrants or individuals without Portuguese parentage. Although cross-national studies generally show immigrants as the least deserving group (Heuer and Zimmermann, 2020; van Oorschot, 2006), the Portuguese results suggest a more ambivalent and less exclusionary configuration, in which national belonging is not the primary criterion for exclusion. This stands in contrast to Central and Eastern European settings, where identity-based exclusion is typically more pronounced (van Oorschot, 2006). Such patterns may be partially shaped by Portugal's historical experience as a country of emigration and by welfare discourses that have traditionally been comparatively more inclusive than in other European contexts. However, recent political and public debates surrounding migration suggest increasing tensions and ambivalence regarding questions of national belonging and access to social rights, indicating the need for caution in interpreting these dynamics. Further research is therefore needed to substantiate and contextualise this interpretation.

The prominence of need as a guiding principle is consistent with broader European findings, where material deprivation continues to legitimise welfare support (Meuleman, Roosma and Abts, 2020). However, the relatively modest correlations of need with the other CARIN criteria in Portugal indicate that this principle may operate according to a partially autonomous moral logic, highlighting the importance of examining deservingness logics in welfare regimes where inequality remains persistent and social protection fragmented (Ferrera, 1996).

The Portuguese findings also need to be interpreted against the background of a welfare regime historically characterised by late development, institutional fragmentation, and a strong reliance on familial and informal solidarity networks (Martins, 2017). Within this familialistic configuration, access to support has historically

depended not only on formal welfare entitlements but also on moral expectations surrounding reciprocity, responsibility, and deserving behaviour. In this sense, the strong endorsement of reciprocity and need observed in the Portuguese sample may reflect a welfare culture in which social support is frequently interpreted through relational and moralised frameworks of obligation, interdependence, and legitimate necessity.

Additionally, the historical centrality of the third sector and faith-based organisations in the provision of social assistance in Portugal may also contribute to reinforcing moralised understandings of welfare access, where support is often mediated through proximity-based, discretionary, and charitable logics rather than exclusively through universalistic rights-based approaches. In this environment, the ambivalence between solidarity and conditionality observed in the results resonates with earlier research suggesting that attitudes toward welfare in Portugal often oscillate between universalistic aspirations and restrictive logics of contribution and control, particularly in periods of economic crisis and austerity (Silva and Martinez, 2015).

Taken together, these findings suggest that deservingness perceptions in the Portuguese sample combine an emphasis on reciprocity and need, common across many European contexts, with a comparatively weaker reliance on identity and control. These findings suggest that the Portuguese case may be situated within broader European patterns of selective solidarity, while simultaneously underscoring the specific institutional and cultural features of Southern European welfare regimes and the need for further comparative analyses that incorporate underrepresented cases such as Portugal.

Social differentiation and deservingness perceptions

The analysis revealed systematic differences in deservingness perceptions across sociodemographic groups, highlighting the role of social position and lived experience in shaping views on welfare legitimacy. Rather than reflecting individual attitudes in isolation, these patterns point to socially structured orientations toward welfare, consistent with scholarship, demonstrating that demographic and socio-economic characteristics condition the extent to which individuals endorse particular deservingness logics (e.g., Kallio and Kouvo, 2015; Meuleman, Roosma and Abts, 2020; van Oorschot, 2006).

Gender differences were particularly pronounced. Men scored significantly higher on control and reciprocity, reflecting a stronger emphasis on individual responsibility and prior contributions as criteria for entitlement. By contrast, women reported lower endorsement of conditional logics, a pattern that resonates with research showing that women tend to adopt more relational, care-oriented, and egalitarian moral frameworks, often valuing need and social justice principles more strongly (Kallio and Kouvo, 2015; Meuleman, Roosma and Abts, 2020). These findings suggest that gendered socialisation and differential life experiences continue to shape welfare evaluations, even in contemporary welfare states.

Educational attainment also differentiated deservingness perceptions. Respondents without a university degree placed greater emphasis on control, indicating more restrictive orientations toward access to welfare. This pattern mirrors evidence that lower educational levels are associated with heightened concerns about welfare misuse and stronger reliance on conditional deservingness criteria (Jeene, van Oorschot and Uunk, 2013; Kallio and Kouvo, 2015). By contrast, higher education was linked to more egalitarian positions, consistent with studies documenting its association with greater tolerance and a reduced emphasis on exclusionary principles (Larsen, 2008). These differences may also reflect distinct levels of proximity and exposure to welfare institutions and social vulnerability. Individuals occupying different educational and socioeconomic positions may experience welfare policies in unequal ways, shaping how they evaluate legitimacy, dependency, and entitlement in relation to social support. These differences underscore how educational inequalities intersect with moral evaluations of welfare, particularly in contexts of limited social protection.

Age effects were small but consistent. Older participants scored higher on control, attitude, and need, indicating greater concern with responsibility, gratitude, and deprivation when evaluating welfare claimants. This echoes van Oorschot's (2000; 2006) observation that older cohorts, having accumulated contributions over the life course, tend to prioritise reciprocity and behavioural compliance as markers of deservingness. At the same time, comparative research suggests that such generational patterns may be attenuated in welfare regimes where universalistic principles are more strongly institutionalised (Larsen, 2008), highlighting the role of institutional context.

Finally, financial strain was modestly associated with reciprocity and identity. Respondents experiencing greater economic pressure displayed stronger concerns with rewarding contributors and prioritising ingroup membership, illustrating how perceived scarcity can intensify competition over resources and reinforce conditional deservingness logics (Meuleman, Roosma and Abts, 2020; Jeene, van Oorschot and Uunk, 2013). These associations indicate that subjective economic insecurity, even among individuals not directly reliant on welfare, may foster more exclusionary orientations.

These sociodemographic patterns can be further illuminated through broader theoretical perspectives. Evolutionary accounts emphasise how moral judgments often rely on heuristics distinguishing between the "unlucky" and the "lazy" (Petersen, 2012), while institutional approaches stress how welfare rights and obligations are filtered through legal, administrative, and bureaucratic frameworks that reproduce social stratification (Eule, 2024). Taken together, these perspectives suggest that deservingness evaluations are not merely individual preferences, but socially embedded moral judgments shaped by both cultural norms and institutional arrangements.

Theoretical and methodological contributions of the CARIN validation in Portugal

The validation of the CARIN scale in the Portuguese context reinforces its psychometric robustness while simultaneously confirming the sociological

relevance of its theoretical underpinnings, as advanced by Meuleman, Roosma and Abts (2020). Consistent with their findings, our analysis demonstrated that the five principles of deservingness — control, attitude, reciprocity, identity, and need — emerge as empirically distinct yet interrelated dimensions. The confirmatory factor analyses provided empirical support for the multidimensional structure of deservingness, attesting to the construct validity of the scale.

Moreover, the internal consistency and discriminant validity of the Portuguese version parallel the original validation, further corroborating the reliability of the scale as a robust tool for measuring deservingness logics. This contribution is particularly relevant in light of persistent concerns regarding conceptual ambiguity and inconsistent operationalisation in deservingness research, frequently identified in the literature (Meuleman, Roosma and Abts, 2020; van Oorschot, 2000).

Scholars have noted that previous studies often relied on proxies or *ad hoc* indicators, leading to limited comparability across contexts (Laenen, 2020). More recently, Knotz *et al.* (2022) have highlighted definitional overlaps, most notably between Attitude and Reciprocity, that risk undermining conceptual clarity and cross-study reliability. By confirming the factorial validity of the CARIN model in the Portuguese context, this study provides further empirical evidence that the five-dimensional structure remains coherent and analytically distinguishable, contributing to the consolidation of a shared conceptual and methodological framework for deservingness research.

Beyond its psychometric confirmation, the validation also has substantive implications for the study of welfare legitimacy. As Laenen (2020) argues, perceptions of deservingness are deeply intertwined with welfare state policies, reflecting a reciprocal relationship between public opinion and institutional design. In this regard, the Portuguese validation not only strengthens the cross-cultural applicability of the CARIN model but also offers a context-sensitive analytical instrument to explore how moral logics shape welfare attitudes in Southern European contexts, which remain comparatively underrepresented in deservingness research despite persistent social inequalities.

Furthermore, as Crabtree and Wehde (2022) show in the American case during the COVID-19 pandemic, the CARIN principles remain central even under conditions of external shocks, underscoring their analytical robustness and global relevance. The present study complements this line of research by showing that the CARIN framework retains its conceptual and empirical coherence in welfare regimes characterised by institutional fragility and moral ambivalence.

In line with other recent validation efforts in the Portuguese context (*e.g.*, Falcão, Jalali and Costa, 2023; Silva and Martinez, 2015), this study demonstrates the feasibility of adapting attitudinal measures to capture culturally embedded perspectives.

In sum, the Portuguese validation not only extends the CARIN model to a Southern European welfare regime but also reinforces its conceptual clarity, methodological coherence, and sociological relevance, thereby facilitating systematic comparative research on welfare deservingness.

Conclusion and limitations

This study contributes to the sociological understanding of welfare deservingness by analysing how moral criteria are structured and differentiated within the Portuguese context, a Southern European welfare regime that remains underrepresented in comparative research. The findings offer substantive insights into the moral organisation of welfare deservingness in the Portuguese context. Reciprocity emerged as the most salient criterion, while need displayed a more autonomous positioning relative to the remaining dimensions. In addition, systematic differences by gender, educational attainment, age, and perceived financial strain highlight how social differentiation structures deservingness perceptions. Taken together, these patterns point to a persistent tension between solidaristic orientations and conditional logics, suggesting that while reciprocity and control remain central to welfare legitimacy, they may also contribute to the moralisation of welfare access and the reinforcement of exclusionary narratives, particularly in contexts of economic uncertainty.

Some limitations of the study should nevertheless be acknowledged. First, the reliance on a non-probabilistic sample limits the generalisability of the findings and calls for caution in extrapolating results to the Portuguese population as a whole. Second, the use of self-reported measures and a cross-sectional design constrains causal interpretation and prevents the examination of changes in deservingness perceptions over time. These limitations are common in attitudinal research, but they also point to important directions for future inquiry.

Future research would benefit from replicating these findings using representative samples, as well as from adopting longitudinal and cross-national designs capable of capturing the dynamic relationship between moral evaluations, policy contexts, and welfare state change. In particular, comparative studies involving Southern European welfare regimes could contribute to a deeper understanding of how institutional arrangements, public discourses, and socioeconomic transformations shape deservingness perceptions across different contexts over time. Expanding deservingness research to underrepresented welfare regimes remains particularly important, as it enables a more comprehensive understanding of how welfare legitimacy is constructed, contested, and transformed across different social and institutional contexts.

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