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Working Paper No.284

**Families, States and Militaries:
Changes in Relations and Conditions**

Astuko Fukuura and Eyal Ben-Ari eds.

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Families, States and Militaries: Changes in Relations and Conditions

This collection is the product of a workshop held at the Faculty of Economics of Shiga University on November 18, 2018. The workshop sought to explore the transformations that military families are undergoing introducing cases from the Philippines, Portugal, South Korea, The Netherlands, Israel, and the United Kingdom, the United States and Japan¹.

The rationale for the workshop centered on developing previous work in the social scientific study families and the state. Much of this scholarly literature on states and families has focused on official policies (say for welfare or childrearing), the practices by which states shape and encourage family types, or the intervention of state authorities in problem families. A smaller number of research projects has focused on workplace dynamics of state employees (for example, administrative staff, managerial personnel, workers in state medical institutions or individuals' laborers in state industries), that is their conditions at work, their careering structures or decision-making. Yet almost no investigations have been carried out on the families of such employees. The one fascinating exception are military families.

These families are especially interesting: they are both similar to and different from the families of employees in other large state organizations thus allowing scholars to explore their unique characteristics. They are also different from other such families in that the organization that they belong to is an especially "greedy institution" (one that makes great demands on individuals in terms of commitment, loyalty, time, and energy)

¹ This workshop was supported by Shiga University International Conference Foundation and the Alumni Association Ryosui-kai of the Faculty of Economics Foundation.

thus putting unusual pressure on the employees and creating tensions with their families. Moreover, in the military there is a chance - like in fire-fighting - that members will become casualties thus adding a dimension not usually found in other organizations. Finally, while military families may be likened to those of commercial sailors where a key member may be away for long periods of time, since they are identified with state-mandated meanings and missions their dynamics may differ in significant respects.

Given these similarities and differences the chapters focused on following questions:

First, what characterizes the families of state workers, and especially military personnel, as opposed to the families of members of other large organizations? This question seeks to chart out the unique traits of such kin groups.

Second, what kind of state-mandated organizational arrangements are there for taking care of families (like housing, medical care)? This question is aimed at understanding the special role of the state in intervening in and shaping of the families of their employees and in our case military families.

Third, what kind of changes have these characteristics and arrangements undergone during the past decades? This question is centered on the major changes that have occurred in light of the changes in the state itself.

We hope that the individual chapters and the volume as a whole will provide good opportunities for further discussion.

Atsuko Fukuura and Eyal Ben-Ari, editors

The *military family* as a social and political category. Brazil and Portugal in comparative perspective

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Introduction

‘Military family’ is a concept that has been extensively used in the social scientific study of the military. Not inadvertently however, in the academic context the plural has been dominant: ‘military families’, with a very concrete empirical referent: military members and their families. The changing missions of the armed forces, with multinational peace support operations becoming core to most western militaries, has brought a renewed attention to the topic. Increased international missions have meant frequent separations between military personnel and their families. The downsizing and restructuring of military organizations, with significant personnel shrinking, has meant for most soldiers intense pre-deployment training periods and high deployment load. Separation from and support to military families have become critical issues for military forces effectiveness. Academic attention to the topic has followed its greater relevance in social practice (Moelker, et. al, 2015).

However, the concept has also traveled to, and been framed within, the social context of the military and the defense policy-making sphere. Here, the meanings attached to this category have not always been so clearly defined. The empirical referent has sometimes shifted from a grammatically and socially plural reality – military families – to a grammatically and epistemologically singular one: *the* military family, referring to all the

members of the military institution, including their families, gathered under one single umbrella category: *one* family. In this case, ‘military family’ has been defined as an entity that transcends individuals, where the strong bonds of family ties link the institution and all its members –including family members. Under this frame, the military family comes to embody the core of military identity and values.

Between these two ideal types, however, some nuances exist in the concrete appropriation and uses of the category in different socio-historical contexts. This paper focuses on patterns and differences that have been detected in the institutional and individual narratives that appropriate the category of military family in Portugal and Brazil.

1. Exploring the uses of a social category: a methodological framework

One first requirement to researching the various appropriations of military family as an empirical category, out of the scientific field, is to take into account the analytical level that is targeted. Different analytical levels often imply different research questions, require different research methodologies, data and sources. Therefore, it is not irrelevant to the research of the social and political appropriation of the category of military family, whether the focus is put on macro structures, organizational levels or inter-individual dynamics. Here, the macro analytical level refers to political/institutional policy discourses and practices; the meso level to group collective action and organizational narratives, and the micro level to social interaction patterns and identity formation.

Each of these levels implies different research questions: 1) to what extent has the concept of ‘military family’ been incorporated into the official defense policy discourse?

- 2) to what extent has it been mobilized at the organizational and collective action level?
- 3) How has it been used as a marker of identity by military personnel and their families?

Likewise, the empirical referents are different: the macro level focuses on state policies and MoD orientations, the meso level on the armed forces as an organization or collectively organized sub-groups (such as trade-unions or professional associations), and the micro level brings attention to military members and their families, their interactions and identity. Each level will consequently be informed by different sources and dominantly require different type of data: laws, policies and political discourses for the macro level, organizational documents, interviews and other type of visual and audio data for the meso level and interviews, life documents, observational/ethnographic data for the micro level (Table 1).

Tabel 1 – Methodological framework for analyzing uses of military family

	Macro level	Meso level	Micro level
Object	Defence policies	Organizational narratives Collective action	Social interaction Identity
Actors	Government MoD	Armed Forces Professional associations Trade-unions	Military personnel Families
Data/sources	Laws and regulations Policy measures Political discourses	Organizational documents Interviews Audio and visual data	Interviews Life documents Observation data Audio and visual data

2. The uses of ‘military family’ in Portugal and Brazil: a comparative perspective

2.1 Portugal: ‘military family’ between absence and politicization

In Portugal ‘military family’ is a rather absent category, both at the macro level of defense policy discourse and action, and at the micro level as an identity category for military personnel. In 2013, almost two decades after the Portuguese armed forces started to send

their soldiers in international peacekeeping missions, there was no specific program or policy aimed at supporting military families. Both from the institutional perspective and from the more informal dimension of social networks, soldiers' families were invisible components of the military social landscape (Carreiras, 2015).

In what concerns state support policies, this absence has been considered puzzling. Unlike many other nations, Portugal knew a rather uncommon pattern of family involvement in military life during the colonial wars in Angola, Mozambique and Guine-Bissau, from 1960 to 1974, when thousands of wives with children followed their husbands to long commissions in Africa. Considering the dominant institutional model of the Portuguese armed forces at the time, as well as the requirements of a war context, it would have been expectable to see families, and especially spouses who became isolated from their previous social networks, being given more institutional attention and being more integrated than they actually were into the military environment and organizational life. At present, with new focus on international missions, a significant number of soldiers deployed, and the perceived importance of family relations for quality of life during missions, again very little specific institutional initiatives (and certainly not a policy) have been developed with the aim of providing social support to soldiers and their families.

At the micro-level of interaction and identity, research has pointed to a detachment from the idea of a military family as a referent for identity: on the contrary, the focus has been much stronger on separation between the worlds of the family and the military. Data from a study of a Portuguese battalion in Kosovo showed that in what regards the topic of institutional support to families, there was among soldiers a rather restrictive understanding of what that support should be, generally equated with facilitating

communication and intervention in case of critical incidents. The lack of need for support was rooted on the idea that the military and the family should be two different spheres, two 'separate worlds', as in the following statement:

“I separate the two worlds; when I’m working, I completely forget my personal life, otherwise it would affect my work; when I leave work, I am in my space, I totally forget work because if I don’t, it would negatively affect my personal life. (...) If we don’t do that, we will create very complicated situations for ourselves and those that surround us in both professional and personal life.”¹

In addition, the idea was put forward that the military cannot fulfill the true needs of the family, either because it lacks resources or because it cannot provide for the type of need at stake. Sometimes, an institutional intervention could even be felt as intrusive:

“I agree [that support should exist] but I also ask: why? Ok, we came here and everything that is done to help those who stayed back home is OK, but help them with what? I think that the only support they need, the one thing they miss, which cannot be replaced is ourselves. Should they put somebody else in our place?²

According to Carreiras, “one way to read these results is that families became rather invisible components from the military institutional space not only but also because they have been, and still are, the backbone of an informal social support system that the armed forces have never been pressured or required to institutionalize” (Carreiras, 2015)”.

¹ Lieutenant M., Platoon commander.

² First Sargent G, personnel.

However, during the past decade, we have witnessed the category ‘military family’ emerge as a significant anchor in military collective action. Military professional associations, namely the three associations for each of the ranks, *Associação dos Oficiais das Forças Armadas* (officers) *Associação de Sargentos* (NCO’s), or *Associação de Praças* (enlisted) have periodically used the category to advance their claims for labor and social security rights. Since military trade unions are forbidden by law, the military have organized around professional associations that aim at intermediating the interests of their members close to the political system. It has been in the name of the military family, and because family members were the only ones that could be publicly mobilized, that allowed forms of social protest took place. The marches were explicitly named ‘the military family parade’. The wellbeing of the military family – ambiguously defined between a singular entity and the plural military family members conception – was invoked in at least two major occasions in 2012 and 2014, to legitimate a fight over rights .

about the military, the borders and diversities they draw against the doxa of the military family (Pinto, 2018); Monnerat illuminates the tensions, contradictions and conflicts that the real experiences of military women in the conciliation between family life and insertion in the labor market represent to an idealized vision of the military family (Monnerat, 2018).

However, the type of institutional dynamics that characterize the Brazilian army, its territorial implantation and the high mobility that it involves, seem to justify the existence of an *elective affinity* with a traditional family model: one that is characteristic of an institutional model of military organization. The ‘military family’ still remains an anchor of identity for the military and their families.

Concluding remarks

The observed differences in the uses of the ‘military family’ category, from an empirical referent to a metaphor, in Portugal and Brazil, are due to both structural and cultural characteristics regarding the military and its relations with society in both countries. On the one hand, there are notorious structural differences in the place and relevance of the military in the state bureaucracies. In Brazil, the historical heritage of the authoritarian military regime still accounts for a defensive reaction of the military against prejudice on the part of various sectors of civil society. The need for differentiation and separation from the civilian world is strong and the reinforcement of the military family is part of that process. Furthermore, the military have kept a high degree of insulation from society, with high levels of self-recruitment (around 60% in the 1990’s) and spatial mobility patterns that reinforce this isolation. In Portugal, the active role of the military in the

democratic cup of 1974, as well as the professionalization of the armed forces have prompted greater civil-military convergence. While the Portuguese military have lost weight, decreasing its quantitative presence and its social outreach, the relevance of the military has been kept, if not increased in Brazil. The nature of missions, the compulsory military service system, the territorial spread of the Brazilian military, with its well identified military communities and *vilas*, are in contrast with a much less visible social presence of the Portuguese all-volunteer force, spatially more concentrated and with significant recruitment and retention problems in the enlisted categories. Erosion of material conditions (social security schemes, pensions, health support) in Portugal, following a more general fiscal crisis of the welfare state, also seems to contrast with the prevalence of an ample benefits' scheme in Brazil.

On the other hand, occupational and institutional value orientations highlight divergent paths, with a clear institutional character still dominant in Brazil and an ever-growing occupational value orientation gaining ground among certain categories of the Portuguese military.

In many respects Brazil and Portugal are thus representative cases of very different contextual causal configurations that explain the relative salience of the military family category as well as its uses in social and political practice.

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