

## Care as sustainability in times of crisis: Between welfare-state and interpersonal relationships in Portugal

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Abstract: Portugal is undergoing a socio economic crisis (with increasing rates of unemployment, low family income, a significant immigrant population, and a growing aged population) that increases pressures on a range of social services. Faced with the failing capability of state care systems to continue to provide support, as well as funding cuts imposed by the international economic crisis, people (re)turn to informal ways to address the problem.

This 'state of emergency' also stimulates creativity and innovation, not only at the economic but also in social and moral realms which are easily overlooked by economic studies of crisis situations. Bearing in mind the danger of presenting an overly harmonious view of social care systems this paper debate how informal practices sometimes support national economies, how people engage simultaneously in formal and informal systems of care and how these strategies are so effective in producing an

effective way to face crisis situations. Care thus becomes a factor of economic sustainability (helping to overcome precarious situations); a factor of social sustainability (providing to people in need); and also of emotional sustainability (well being).

**PALAVRAS CHAVE:** Cuidado, Crise, Família, Economia moral

**KEYWORDS:** Care, Crises, Family, Moral economy

The concept of care has been used by the social sciences to address situations of health risk and privation reached as a result of factors which include, though are by no means limited to, the State's failure to provide for citizens. Nevertheless, in our daily social existence, the term care is used in a broader sense to describe a set of processes and feelings that are experienced among people who support each other in a variety of spheres of social life, and which do not necessarily involve situations of privation.<sup>1</sup>

This term, however, encloses a double meaning: on the one hand it describes a practice, or a set of practices (caring for another), and on the other it signifies a value, or a set of values (the affection of the one who provides care, the compassion/empathy contained in the relationship with another).

In this paper aims to make a preliminary discussion some of these dimensions of care focusing on the Portuguese case and the ongoing the transformations brought about by a context of crisis. Similarly to other peripheral southern European countries, Portugal is currently undergoing a major economic and social crisis. These countries have in common a very recent centralized Welfare State (that only became fully developed only by the end of 1970s). Broad generalizations of Southern Europe defined it as a familialist structure of welfare provision using the notion of 'welfare-society' - defined as the networks of relationships of inter-knowledge, mutual recognition, and mutual help based on kinship and community ties, through which small social groups exchange goods and services (Santos 1993).

The current moment of crisis and resulting austerity policies that have ensued from the intervention of the IMF and the ECB in 2011, have forced the organization of our still young welfare state to suffer dramatic transformations that are leading to its virtual disappearance. At the same time, the country's demographic and social context has also changed. The effects of the imposition of austerity regimes, negotiated with transnational economic agencies to tackle the sovereign debt crisis post-2008, have generated a crisis of social reproduction. After 3 decades of economic growth and

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significant improvement of social conditions, we are now facing an alarming context of rising unemployment rates (17,8% in April 2013; 15,2 in April 2012; 12.6% in 2011; 10,8% in 2010; 9,3% in 2009; 7,6% in 2008; since the beginning of austerity policies it has risen around 8%, 5% of which were registered in the period since the troika started its intervention two years ago). Shrinking family incomes, accelerated population aging, tax growth, increased cost of living, and an overwhelming feeling of economic and social instability, decrease of welfare benefits and systematic policies of labour devaluation, the increasing feelings of welfare dispossession and citizenship destitution, and of impending collapse. This state of affairs considerably increases the pressure brought upon social services, inevitably hampering their ability to continue ensuring what until very recently had been considered universal civic rights, and carrying very obvious consequences for the everyday life of citizens. This could be understood both as a time of 'exception' as well as a time of 'emergency', when laws are currently being updated, changing the daily lives both of citizens and institutions to uncharted territory.

How are citizens coping with this fast changing panorama in terms of their daily lives, considering the high rates of unemployment, the increasing tax wages applied to work income, essential goods and services and the bankruptcy of their own finances?

Therefore, the present crisis cannot be merely thought of as only economic. The dramatic impact it has had on the European social model have also turned it into a social crisis, causing the breakdown of the models of social reproduction built over the last decades, bringing into question not only markets but also institutions, social relations and ways of living, thus affecting every aspect of daily life. While increasingly larger sectors of the population see their living conditions deteriorate and become increasingly unstable, the survival of citizens is ever more dependent on the promotion of alternative strategies.

### **New contexts of instability and uncertainty – New forms of care**

Present changes in the Portuguese society and in the ways of living daily life, have had a deep impact on multiple domains of people's existence, in how they view life and thus on the decisions they make with their future in mind. The lack of job perspectives among the youngest generations, the sheer uncertainty regarding their future economic stability, have been pointed out as one of the factors that most strongly conditions the

taking of decisions such as leaving the parents' house, settling into a conjugal relationship, or having children. Along with the new forms of family, it is urgent to start thinking about the new forms of cross-generational dependency and solidarity that are emerging in this prolonged juncture of instability.

The case I will be focusing on refers to Évora: a small, traditionally agricultural city of 50 000 inhabitants, but whose economic activity in recent years has been mainly connected to the growth in tourism (it was declared a World Heritage City in 1986) and the development of the University. The current economic difficulties that have overcome the city in the last years result from the abandonment of agricultural activities, a slowing down of small industrial activity, a sudden fall in the birth rates and an aging population, as well as the loss of its younger population to the great urban centers. This set of factors, added to the cuts in salaries and state support over the last couple of years, have been responsible for a significant drop in incomes which, combined with the rising unemployment, increase this population's need for support, especially considering that even before the effects of this crisis it was already a vulnerable population, to a great extent relying on the welfare state system (an aged population dependent on its pensions; a public university depending on public funding).

The enforcement of cuts in the public sector; the cuts in pensions and salaries; the rise of unemployment, leave the population in a precarious situation marked by increasing deficiencies, but where at the same time alternative solutions, based on both formal and informal mechanisms - whether in the shape of statal or creative and innovative non-governmental structures -, have been found to meet those needs, thus allowing the population to face an increasingly adverse day to day life.

Pedro is getting ready to move into a shared apartment with Margarida, who lives by herself in a rundown house inherited from her family, and which she cannot afford to maintain on her own. It was only due to the contribution and three months of voluntary work put in by dozens of people that the necessary repairs were done to the house (900 hundred hours of voluntary work and donations from friends).

After hearing this account you are probably thinking of the countless similar stories that had recently come to our attention; of urban young people who organize themselves in alternative and collective ways (interchange meets, community orchards, etc) as a

solution to an otherwise impossible economic situation, given that they don't have the money/liquidity to pay for goods and services.

But this is not the case. Margarida is a 78 year old lady living in Évora's historical center, in her family's manor house. She is a poet and Portuguese language teacher. Margaret lived in Lisbon where she led a life of intense political involvement. After retirement she moved to Évora, where she contributed to the cultural life of that city and promoted events such as literary debates, keeping herself busy and active. A rheumatic disease significantly limited her self sufficiency and the cuts in her pension complicated her financial situation.

Pedro, born in Fundão (150 km north of Évora), is a young college student in the second year of a degree in Food Engineering. Even though both his parents have been unemployed in the last year, Pedro lost his academic scholarship and the support from social services to carry on studying, therefore leading his parents to make the tough decision to pull him out of university, which they could not afford to pay for.

At the moment of this account, Pedro is able to continue his education because he is living in Margarida's house, where he doesn't pay rent and splits living expenses with her, while Margarida benefits from his company and his help in the running of errands and house chores. "Bonds for Life – House and Company"<sup>2</sup> is a joint project of the City Council and Évora University, supported by a host of other institutions: Time Bank, the caretaker's corner; Évora Community's health center and volunteer bank of Care-giving Services.<sup>3</sup>

Margarida's house had reached an advanced state of deterioration and was remodeled through voluntary work and contribution from the Time Bank members, a non-governmental organization made up by associate members who dedicate their time to help people in need. At the Time Bank all the work is exchanged in a system of deferred and generalist reciprocity, being that the 84 associate members offer their time to whoever seeks it, and in turn receive help whenever they need it. Some people will ask for help to pick pine cones for the fire place, to fill out the IRS forms, to tutor their children, to babysit, to keep elderly people company, to assemble prefab furniture, to exchange lemons for vegetables, paint walls, cook meals, or pretty much whatever might help to fulfill anyone's daily necessities). 900 hundred hours of work were put in

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<sup>2</sup> "Laços para a Vida – Casa e Companhia".

<sup>3</sup> Banco do Tempo, o cantinho do cuidador, Unidade de Cuidados na Comunidade de Évora do centro de saúde e o banco de voluntariado .

by members of the Time Bank, and all the necessary materials were donated by a local company.

This collaboration among institutions (City Council, University, Health Center, Eugenio de Almeida Foundation), and people organized in NGO's (time bank and volunteer bank), is what guarantees the necessary conditions to ensure daily living conditions and social reproduction of the people involved. The strategies to overcome economic difficulties that result directly from changing conditions of the welfare state system (legal changes and cuts in budget, benefits and pensions), come down to finding creative ways to pool resources, whether material or human.

The multiple volunteer movements that have emerged in Portugal at this time of crisis and transformation provide a good case for a reflection upon this version of the moral meaning of altruistic care. The generalized feeling of precariousness, vulnerability and necessity that many people are going through, is the reason most frequently mentioned to justify participation as a volunteer in an institution; a moral motivation of compassion for others. Care is a motivational disposition that expresses moral ideologies of justice and goodness. The metaphor of "care" is thus often used to illustrate moral concerns about ideal existence in a world marked by deep iniquities and deprivation.

We have become accustomed to associate the forms of exchange we have found in Évora with movements of the younger urban generations, who create these non-mercantile forms of trading as a reaction to the capitalist system and globalization. In terms of its philosophy, the strategy to manage everyday life without money, through generalized system of exchange, is the same among the elderly population of Évora as it is among the alternative urban youth culture of Lisbon, Barcelona or London. However, we must strength the point that these forms of solidarity are actually not new, alternative or modern. Rather they represent the resurgence of previously existing support and mutual help systems that over the last decades have been replaced by more mercantile practices. Families are now falling back on traditional forms of solidarity and family care to overcome new situations of need. In a situation of failure to deal with circumstances, people turn to traditional solutions in a new setup, thus taking the former in new directions and adding new meanings to it. One other new dimension that should be taken onto account in the Évora example, is the way in which these traditional forms of mutual help summon public and private institutions to support and guarantee trade and informal relationships. In the case of Margarida and Pedro, who had never met

before, the city council and the university act as a guarantee of reliability and seriousness, insuring them that they can trust the stranger whom they are about to share their house with. The health center makes regular house visits to check up on them twice a month during the first 3 months, and once a month from then on; the time bank provided the work force to fix the house. This modern, coordinated and institutional form of cooperation is quite different from the old direct trading practices, which surprisingly are more frequent among urban alternative movements.

In order to face up to everyday basic needs, and given the welfare state's current failure, citizens are resuming informal routes to provide for their daily needs, such as the support provided by interpersonal networks or non-governmental organizations. The social transformations ensuing from the crisis and adjustment policies, have turned our existence into a paradox: after 3 decades of seeing the welfare state assume an ever greater role and the labor market promoting individualistic life models and avoiding familistic ways of social reproduction, now state policies and ideology once more try to shift the burden onto the citizens. This "state of emergency" encourages the emergence of alternative solutions to the existing processes of social reproduction, not just in the economic sphere, but in the social and moral spheres as well. Public actions of social solidarity grow day by day, the personal stories of help received by friends, neighbors, relatives or mere acquaintances are commonly heard. However, this apparent return to old communal practices poses an ideological problem, since they make it seem as if we are "drawing back" from some of the progresses achieved by the recent model of the welfare state system. Though not entirely new, this phenomenon does not constitute a simple return to the past. Society has changed, mentalities have evolved, and therefore the same practices of interpersonal care no longer have the same meaning as previously.

By resuming these forms of intergenerational solidarity today, we are in fact contradicting the perpetuation of the individualist project that has been flourishing over the last decades, connected to concepts like the search for individual well-being and personal fulfillment so prominent in other types of economies of a more versatile nature.

Actions borne out of personal initiative, imbued of the morality of "care" and the common good, have become frequent in a country where they had barely existed previously, and now proliferate in many different dimensions of social life. While these informal strategies make life possible in moments of crisis, it is precisely due to the fact

that they become necessary mechanisms of survival in such moments of uncertainty, not only for those who rely or benefit from them, but for the social system as a whole, inasmuch as they somehow inhibit the escalation of social tension and individual as well as collective economic breakdown. This is why I sustain that care becomes a factor of sustainability, both at the economic level (providing for people in need) as well as the social (guaranteeing the maintenance of the social fabric) and also the emotional spheres (providing some measure of wellbeing in a daily existence marked by uncertainty and instability).

### **Concluding Remarks**

It is my belief that the emotionally committed task of caring will become an essential topic in a new historic period which has been witnessing a very dramatic transformation of the social contract. The determination of the IMF and the ECB to impose policies whose exclusively economic motives ignore this element, will not succeed in bringing a consistent solution to the problem

Nevertheless, unveiling the alternative practices that are currently breaking out again, entail a political risk: the one of providing grounds for the ideological and moralizing argument used by defenders of a fierce neo-liberalism; the same that is at the core of many political decisions being taken under the pretext of this crisis. The dangerous idea that state-provided care is not a right, but a favor that is granted to citizens temporarily, since it should rightly be a family duty: according to the current minister of social security (and member of the right-wing Christian Democratic Party), traditional family structures which have been transformed in the process of modernization, should regain their former importance. The debate is thus shifted from the discussion of a civic right to a moral, ideological and political dimension.

This presentation has sought to remind those who study the present economic and social juncture that informal practices of care are part of the important elements that sustain a decaying economy, and of how these strategies effectively help to survive a bankrupt system. Moral dispositions of interpersonal care is a crucial element to face situations of crisis (economic, personal, and political) and that therefore it is a factor of sustainability.

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