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Economic crises and resilience strategies of women – a case study from the Portuguese northern inland

Pedro Gabriel Silva^a, Hermínia Gonçalves^a, Octávio Sacramento^{a*}

^a Universidade de Trás-os-Montes e Alto Douro, Quinta de Prados, Vila Real, 5000-801, Portugal

Abstract

This paper presents the outline of a research based in four case studies of women facing social vulnerability and economic grievances in the district of Vila Real (Portugal). These cases offer an heterogeneous picture of the constraints that affect women threatened by precarious, underpaid, informal and seasonal jobs, a condition worsen by the lack of employment opportunities and increased personal responsibility over the household and dependent kin. Identifying the strategies these women use to overcome the difficulties is a major objective of the paper as well as understanding the role of informal family and community solidarities.

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1. Introduction

Along the following pages it will be presented an overview of the study “Resilience strategies of women and families caught by the 2008 economic crises – case studies from the Vila Real district”, in northern Portugal. These case studies were part of an ongoing international research project called “The labor inclusion of women in collectives at risk of social exclusion. A transnational perspective” (Project reference Exp. 147/12 MSSSI, coordinated by Oscar Fernández Alvarez (University of León), financed by Ministerio de Sanidad, Servicios Sociales e Igualdad de España) devoted to the diagnosis of the situation of women belonging to collectives facing risk of social exclusion and the role of welfare policies and mechanisms. Drawing mainly from qualitative methodologies, the chief aim of the project was to know how these collectives suffered the impacts of the economic crises. It was also an objective to understand how

* Pedro Gabriel Silva. Tel.: +351-259350000; fax: +351-259350480.

E-mail address: pgpsilva@utad.pt

these women, when facing the degradation of living conditions, took immediate and long-term decisions in order to counter the emerging socio-economic vulnerabilities. The project also intended to scrutinize the role of social protection policies and their relationship with the public.

Departing from that research layout, the Portuguese share of the project was centered on a group of three women that, though not sharing the same profile in terms of age, marital status, social background, literacy, life history or maternity, faced a common circumstance: all of them benefited from conditional income transfers under the scope of the State-run Social Inclusion Income (SII) program (a fourth case was that of an homeless woman who was not covered by the SII). The SII is part of the national strategy to fight poverty and social exclusion and evolved from the first program instated in 1996, then called Guaranteed Minimum Income (GMI). Unfortunately, this paper does not allow the necessary space to present an historical contextualization of the GMI and its evolution to the SII, though it would be important to underline the fact that they correspond to the first wide-scale conditional cash transfer measures to be offered in Portugal and reflect the consolidation of a social policy devoted to strengthen Welfare State mechanisms (an indepth view of the Portuguese conditional income policies can be seen in Branco (2001), Hespanha and Gomes (2002), Dornelles (2009) and Rodrigues (2010)). Since the mid 1990's, when these policy measures began to be implemented in Portugal, they soon became associated with paucity, functioning as an agent of social stigmatization. In fact, being a beneficiary of the GMI and, later, of the SII, signalized a state of vulnerability and a social image of poverty, nurturing, especially in the conservative sectors of society, accusations of social dependency and idleness.

As stated above, the aim of our study was to attain a view of the strategies used by socially and economically vulnerable women to counter the consequences of the economic crises, departing from first-person testimonies and the representations avowed by the individuals themselves.

2. The conceptual frame and the research questions

Given the importance of the SII in the context of the Portuguese policies for social inclusion, it is virtually impossible to turn a blind eye to the program's role when studying social vulnerability and poverty alleviation strategies. As we were able to grasp from our research, when household income is drastically reduced or becomes inexistent, the SII turns out to be the most important source of revenue for an entire household. With it, befall a set of obligations in the form of an Inclusion Contract (IC), presented technically as a condition to turn the SII program into an instrument of active labor insertion (Hespanha, 2008). Something that, drawing from the accounts collected in our investigation may be far from being accomplished, as we will address later.

In fact, income policies like the Portuguese SII are acknowledged by a wide array of authors as irreplaceable when it concerns fighting extreme poverty. In the case of Portugal, the SII became the major structuring measure to combat poverty as a result of the deterioration of other social protection mechanisms and in face of rampant unemployment. In the line of Paugam (2003), who emphasized the importance of income policies, Capucha (1998), Branco (2001; 2009) and Hespanha (2008), just to mention a few, have clearly stated the role of the SII in controlling socio-economic inequality in Portugal. Nevertheless, the centrally planned SII presents a series of operative, structural and symbolic frailties. In this sense, a set of constraints has been pointed by Hespanha (2008), Capucha (2005), especially in the form of weaknesses at the level of the IC's regulation and realization frames. Take, for instance, the cases where, sometimes, the IC ends up bolstering socially undervalued tasks or precarious professional activities, instead of promoting effective labor inclusion, as the beneficiaries inquired in our research recognized.

Nevertheless, conditional cash transfer policies are intertwined with the prospect of a newer social citizenship cadre (Monereo et. al., 1999; Lomelí, 2008; Branco, 2009). The right to minimum guaranteed income thus presents a condition for a more economically balanced and socially inclusive society. As the term suggests, these income policies are often subject of conditions that take the form of employment and occupational programs. Considering that the program is centrally designed and implies standardized procedures, its application often transcends the recipients' idiosyncrasies and territorial specificities. Indeed, local distinctiveness and territorial asymmetries are hardly encompassed by policy technicalities, rendering this kind of measures more difficult to implement, a circumstance aggravated by biased power relations between beneficiaries and the entities in charge of running the programs locally.

Perceiving how women facing unemployment and socio-economic vulnerability interact with social protection devices such as the SII and other inclusion-oriented programs thus becomes the backbone of the research. Indeed, a variety of questions stem from the examination of the discourse and representations held by the recipients of

conditional cash transfer policies: how did the crises affect their daily lives, routines, projects and family relations and to what extent social support devices reached unemployed women? Were such devices proportional to the needs of their beneficiaries? Were the Inclusion Contracts delineated in accordance with the individuals and families' possibilities and hopes? How was power brokerage set between the institutional agents and the recipients of social support? Besides State support, which kinds of formal and informal aid were (re)activated? In face of the Welfare State's draw back, what was the role of family and community ties when it came to securing basic necessities? How did the crises impacted on family and household organization?

These questions invite us to analyze the evolution of social policies under the frame of recent austerity measures and listening to the individuals that suffer the consequences of the economic crises can provide a grounded notion of how the recession and austerity are really impacting on people's lives. On the other hand, such listening may take us closer to the strategies people hold in order to cope with difficulties. But, above all, listening to the ones that endure harsh life conditions and benefit from poverty alleviation measures grants us an opportunity to voice their assessment of the adequacy of social support devices.

3. A methodological frame to tackle the resilience strategies of women and families

The research consisted of four case studies aimed at tracking the different facets of socio-labor exclusion in the southern half of the Vila Real district. One of the subjects was a single childless 73-year-old homeless from the city of Vila Real who, up until her retirement, held a stable labor contract as a civil servant. This case points to those situations where the elderly deprived of their family network and social bonds face an aggravated risk of exclusion that may evolve to the harshest forms of poverty. It also allows watching how the local devices meant to respond to homelessness deal with emergent situations.

A second case refers to a 50-year-old divorced mother of two daughters (also a grandmother of two girls), cohabitating with her elderly parents. Unlike the first case, this one belongs to a rural setting, more precisely to a village incrustated in-between the hilly vineyards of the Peso da Régua municipality, close to the Douro river. Unfinished elementary school and an active life devoted to physically demanding rural activity as a wage-laborer alongside with health complications that severed her work capacity characterize this woman's case. Long lasting unemployment has put her in the path of conditional income programs for more than six years.

Another case brings about the situation of a 59-year-old divorced mother of three children – two of them, university students, still live under her household and a third daughter, a 30 years of age mathematician who struggles to find a stable job, from time to time, recurs to her mother's aid. Living in the city of Vila Real and married to a building contractor, until 2007 she and her descendents held a solid economic situation, suddenly broken by the 2008 real estate and construction crises which hasten the marriage's termination. With incomplete elementary schooling and without any particular technical skills or professional training, she soon became a beneficiary of the SII, as her household's income became almost non-existent. The characteristics of the case render it close to what is usually mentioned as "ashamed poverty".

The fourth case belongs to a 52-year-old married mother of two boys (with 29 and 24 years of age, both unemployed by the time the interviews took place), living in Alijó, the headtown of the homonymous municipality. Unlike the others, this case presents a woman with nine years of schooling and an almost uninterrupted series of professional training attendance from as early as the mid 1980's and throughout the 1990's. Albeit that fact, she never had a stable work contract and the jobs that she took for more than two years in a row were devoid of any formality. Retained by long-term unemployment, she was a first-hour beneficiary of the GMI program, in 1996, only to leave the SII two years ago. A contract as a medic auxiliary in a health care facility took her away from more than a decade of conditional income programs, yet her experience offers an inestimable example of the frailties of the inclusion contracts mentioned earlier.

With the exception of the homeless woman, all the cases present vivid examples of how, under severe conditions, women provide for the household economy, while preserving family cohesion and intergenerational nexus. They also offer an interesting view of the role played by matrifocality in the adaptation to contemporary socio-economic changes and the ensuing vulnerability risks.

To carry out these case studies, a series of semi-structured interviews along with life and family histories were collected between December 2013 and April 2014. In two cases, it was possible to conduct collective interviews with the household members.

The territorial context to which belong the cases is characterized by the prevalence of the agricultural sector. Here,

the vineyards fill up the landscape, especially along the steep hills carved by the alluvial basins that join the Douro River. Not surprisingly, winemaking is among the major economic activities of the region, along with the services sector, concentrated in the major urban centers of Vila Real and Peso da Régua. Viticulture thus sets the tone for the considerable economic dependence on agriculture (Ferreira, 2012). The female workforce in this sector represents up to 40%, and shows seasonal fluctuations in accordance with the requirements of the productive cycle. Furthermore, this feminine workforce presents low levels of qualification and is subject of low and variable wages (*idem*).

However, after the 2008, the regional impact of the economic crisis has been felt with particular intensity in the sectors of construction and public works, commerce and services, more than in agriculture. Since then, a considerable volume of small and medium-sized enterprises was liquidated and, consequently, the unemployment rate increased. In August 2012 unemployment stood close to 18%, affecting mainly women (7396 compared with 6159 men) from the age group of 35-54 years (NERVIR, 2012). This situation, combined with the reduction of the State in social protection measures, explains, to a large extent, the persistence (and increase) of the informal economy and the worsening of vulnerability situations and social exclusion of women in the region.

4. Unemployment, social exclusion and conditional income policies: a review of women's representations

The inquiry brought up answers that exceeded the initial questions and prompted new discussions (see part two of the paper). While exploring the ways through which our subjects tackled economic hardships and dodged social vulnerability, came to surface other issues regarding welfare services provision and transformations in the layout of territorial communication systems. In concrete, the impact of recent changes in the provision of health, educational and justice services and in public transportation networks is pointed out as a backset that aggravates the daily lives of socially de-capitalized groups. The closure of proximity public services, the suppression of regular bus lines connecting peripheral areas to urban centers, and the deactivation of train tracks contributed to intensify the dependency of those already facing labor exclusion. The dismantling of those structures, acknowledged as a key-element of territorial cohesion and an important ingredient in the making of inclusion policies, ended up contributing to render ineffective the very same instruments of socio-economic inclusion, such as the conditional income programs. In fact, the fulfilling of the conditions imposed by the SII depend on the existence of a structural frameset that has receded in the recent years.

Yet, part of the most interesting feedback had to do with how these women perceived and represented social support devices and, especially, the SII program. In line with critiques stated by several authors to conditional income programs (Lomeli, 2008; Dornelles, 2009; Rodrigues, 2010), all the inquired subjects that benefitted from the SII offered a vivid depiction of the stigmatization involved. Becoming a SII beneficiary, for all of them, suddenly meant bearing the social mark of poverty – a condition that limited everyday movements, refrained social interactions and public displays of well-being. Sitting in cafés, attending cultural venues or traveling, suddenly, became forbidden actions. Sipping a cup of tea in a pastry shop meant, for two of the women, was motive for gossip. At the same time, as SII beneficiaries, certain investments could be subject of negative appraisal by social workers. For instance, the improvement of housing conditions, as if the recipients of the SII needed to conform to a stereotyped notion of poverty and behave in an irresponsible manner when it comes to financial managing.

The criticism around the running of the SII program is also directed at the performance of the technical staff in charge of accompanying the cases. These are professionals, usually social workers, psychologists and sociologists working for the Social Services, responsible for delineating and enforcing the Inclusion Contracts that bind SII beneficiaries. In the voices of the inquired women, the Social Services, through their technical field agents, tend to present an unempathetic, sometimes harassing, stance. Indeed, the beneficiaries accuse the Social Services of conducting a policing activity, disapproving public manifestations of money expenditure, rather than securing the ways to accomplish the fulfillment of the ICs.

When denouncing the scarce backup of Social Services and the inexistence of proactive measures towards labor inclusion, the inquired women uncover the assistencialist dimension of technical procedures and the lack of an effective empowering process. Professional training, presented as key condition to increase the social and cultural capital of people, according to the cases studied, ends up becoming a mere occupational expedient, without any visible influence in labor inclusion. The perception that professional training will not solve their unemployment situation contributes to aggravate the disbelief in a “system” structurally and historically set to leave women behind. “Who’s gonna give me a job? A 59-year-old woman with less than the fourth grade of school, when there are so many unemployed young with university degrees”; “Even if I could get a job, I would not be able to keep it for long because

of my health. Nobody wants an old sick woman around”; “I could attend all the courses and go to all those meetings [in the Employment Center] and still wouldn’t get a job. If it wasn’t the good will of an old friend of mine, I would still be here waiting to work and counting the SII pennies” – these are scant examples of the discourse singled out from three of the interviewees. On top of that, there is a pervasive feeling that the SII’s Insertion Contract, instead of encouraging the subjects to seek work opportunities, forces them to assume a passive stance in this regard. In fact, the individual SII benefits cease when the beneficiaries find a source of income, generally through a work contract, which means that the program’s layout is incompatible with casual odd jobs. In face of the need to increase the household’s earnings, two of the cases recognized resorting to informal jobs while receiving the SII. Through the demonizing of small unsteady and underpaid tasks, the SII program contributes to reinforce the dependency of its beneficiaries on conditional income policies and, promotes, indirectly, informal economy mechanisms. An irony outspoken by one of our subjects: “People keep sayin’ that the ones who depend on the SII are a bunch of lazy guys that don’t want to work. Well, whenever I want to do something that can bring my family and me an extra 10 euros, I have to do it on the sly. It looks as if I am a big criminal”.

The cases also pointed out the actual importance of family relationships and sociability networks. Family ties help solve urgent financial needs and provide support in a series of situations where the welfare State has retreated. These networks seem to have acquired an increased significance as the migratory option stopped representing a long-term solution.

6. Final remarks

The cases that compose our study offer vibrant discourses and far-reaching reflexive insights about the experience of poverty, unemployment and social vulnerability. They also present an opportunity to observe how social policies and the social support devices that enact them interact with the targeted groups. Under this particular subject, the cases give evidence of the processes that accompany the implementation of the SII conditional income program and how it is seen by the beneficiaries. By listening to them, the key features of the program as well as its downsides can be scrutinized from a grassroots perspective. Part of the SII’s program design and local implementation schemes (especially its flaws in relation to the aim of reinforcing active forms of labor inclusion), can be discussed departing from the peoples’ representations. Such representations may, as well, direct us to understand and denounce how social support mechanisms convey the stigmatization of groups and individuals.

The cases also draw our eyesight to the importance of gender roles within resilience strategies. Female monoparentality can become an enduring facet of women’s lives, as their descendents get caught in long-term unemployment, unable to leave the original biological household. Hampered by unemployment, women become overwhelmed by economic difficulties, while, at the same time, their responsibilities towards dependent kin, both descendents and ascendents, swell.

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