

# Theorising Engagement and Agency: Social Accounting for Unpaid Care in Scotland

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## Abstract

This research will attempt to theorise engagement from the perspective of advancing and aiding social change. This will include a review of both theoretical and empirical insights within the existing literature, but crucially will also provide a practical example of what we can do to engage more effectively by giving a social account of carers in Scotland.

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## **Chapter 1: Introduction**

### ***1.1 Introduction***

I am now convinced that any suggestions for reform beyond current accounting orthodoxy, however well-meaning, will fall foul of inertia, resistance and disapprobation from the accounting profession, the State, the corporations and academics if it relies only on decency, sound argument and persuasive evidence. (Gray, 1998, p. 208).

It has been lamented that social accounting has often not met its radical potential. Rob Gray, for one, has suggested that part of the problem is that social accounting is under theorised. However, the key contribution of this research lies in examining whether instead theories are present but that the problem lies in the problematic assumptions they contain. Ball (2004) and Laughlin (1995) have touched on the question of different theoretical perspectives and its implications for engagement. Whilst some Marxist theorists (Cooper, 2002; Cooper and Coulson, 2013) may have shone some light on engagement practices and assumptions, it seems that this type of critique has not been the explicit intention of their work. Therefore, this thesis will use a Marxist approach to ask:

*To what extent do the theories underpinning engagement undermine social change agendas?*

This is conducted with a view to better encouraging agency. Here, agency is a reference to activity carried out by agents with the intention of influencing the social world around them. However, it will not explicitly examine how to engage in terms of methods but rather emphasise which social forces we should look to for social change and which we should not. Thus, the primary research aim is to argue for a refocusing of future engagement attempts. This is to be achieved by providing an alternative theoretical position to those dominant in the literature. This thesis thus represents theoretical preparation for future attempts. This is achieved in three ways:

- 1) The provision of a critical assessment of assumptions about engagement contained within the literature.

2) Theorisation of the capitalist state through the literature review (Chapter 2) and the history of the welfare state (Chapter 5) to challenge often implicit assumptions, which have negative impacts on engagement practices.

The welfare state section thus provides an empirical example to question dominant assumptions about engagement which were often implicit within the literature review. For example it questioned the reliance on individuals with influence or the state to provide adequately for our needs.

3) The provision of a Social Accounting for unpaid care in Scotland to give an example of how social accounting could be conducted.

With respect to the first of these, the implications for agency of different approaches will be assessed.

Here it will be argued that, although not dominant, postmodern assumptions still remain as fragments within some of the contemporary accounting research (Ball and Seal, 2005; Brown, 2009 and Mouritsen et al, 2002). What this research often maintains with those in the pluralist tradition is voluntaristic tendencies which deny or ignore structural constraints. Much of this stems from idealistic prescriptions of the state and accounting institutions, leading to an emphasis on individual actors such as politicians, middle managers or accountants. This focus limits the horizons of what amount of change is deemed necessary or possible but also reinforces the previously held ideological understandings since we appreciate only the limits these individuals find themselves in.

The literature review will also consider the historical development of social accounting as a reflection of the context of radical ferment. However, increasingly it has been adopted as an “ideological response” (Spence, 2009) and as a process of legitimation, making social accounting a grounds for political contestation. Rather than arguing all types of social accounting are essentially the same, by using Ecological Economics as an example, the discontinuities with much of the more critical research in the field will be shown. This will then lead to a discussion of how the ambiguity of the project is reflected in the terminology of accountability and disclosure whose dominant use is often in serving ruling class interests. However, these terms also reflect a desire for greater democratic control from the mass of people. In teasing out the more progressive uses and applications of these terms, the thesis attempts to show the



potential value they could play if harnessed alongside social mobilisations and articulated demands which challenge dominant interests.

Here, contrary to some claims (Ball, 2007; Brown, 2009) it is argued that we should attempt to assess what is likely to forward meaningful social change, especially since many are beginning to accept that many practical attempts at SEA have achieved very little in forwarding goals of democracy or accountability (Kamla, 2007; Gray, 2002).

This literature review thus encompasses a number of different questions including:

- 1) What is social accounting and how is it used?
- 2) Why did social accounting emerge and become so widespread?
- 3) Are concepts such as accountability and the focus on disclosure progressive?
- 4) Can we rely on the capitalist state, government actors, company management or accountants to forward social change?
- 5) Do tactical considerations matter to social accounting?
- 6) What type of social accounting would be meaningful for forwarding social change agendas?

The thesis concludes that social accounting should be “hurting” and focused on contemporary issues of direct relevance to people’s everyday lives and struggles. It will show how frequently implicit assumptions about the state impacted the tactics deemed appropriate. This provides the context for the history of the welfare state section which follows in Chapter 5. This is used as further evidence for a refocusing of engagement practices. However, whilst this section on the welfare state primarily hopes to challenge idealistic assumptions about the state and individualistic theories of agency, it also helps to provide a context for the future politicisation of the caring role that would be hard to envisage otherwise.

Of course, providing arguments about the problems with existing theorisations and attempts at engagement is important but can lead to fatalism in the absence of what we could do instead. Therefore, an attempt is made to use the insights from this critique to inform a different kind of attempt at social accounting.

In this respect, the thesis examines the question of unpaid carers. Here, unpaid carers are defined as those who help others with an illness or disability without wage payment. This attempt at social accounting thus seeks to contribute to the care debate in order to better encourage campaigns on this question.

To introduce the context of the social account, the thesis will outline the financial, legal and social context of the caring role today and some of its consequences for those who carry it out. This is mainly compiled through the use of data compiled from previous research.

The interviews conducted then show the difficulties carers and the person they care for face. From this, general themes will be developed. It will be shown that Carers Allowance is often not accessible and that carer disability and health problems are prevalent. Although many carers speak of the idea of “family duty”, this is not divorced from the context of a lack of available services and alternatives which are suitable for the person they care for. Despite being angry about the situation, in the context of disillusionment with government actors, many felt that they simply had to continue regardless.

The following chapter then looks at why unpaid care exists in its current form. This includes looking at why this type of care is so dominant and why government actors refuse to act on this question. This seeks to explain the role of carers in the context of disability discrimination and the role of the family. Underpinning all of this is an understanding of the economic laws of motion of capitalism and how those not deemed suitable for profitable exploitation are cast aside. Part of the evidence for this is to look at the legal texts outlining the logics and motivations behind the first care allowance.

This thesis will look at how arguments about decreasing or increasing support are framed using alternative costing systems. On the one hand, government actors claim that unpaid care is purely a function of an ageing population and the additional costs associated with this, resulting in a “care time bomb”. On the other side, carer groups outline how much this unpaid care saves the UK and Scottish governments and how it may be cheaper to provide support to carers earlier to prevent longer term costs associated with carer breakdown. If this is indeed the case, it would be hard to explain government inaction on this question. Here, an alternative explanation is provided that

examines why disabled people and carers are treated as they are and why carers are predominantly women with most care taking place within the family unit.

The research therefore seeks to ask two questions by carrying out a social accounting of unpaid care in Scotland.

- 1) What are the consequences of unpaid care within the existing setup?
- 2) Why does unpaid care exist in its current form?

Although the primary data source takes the form of recorded interviews (Chapter 7), the use of data from previous research supplements this in terms of looking at the “what” of care (Chapter 6). This is combined with a detailed theoretical explanation of why unpaid care exists as it does which goes beyond mere description (Chapter 8).

By looking at the ideas and material experiences of carers this social accounting helps to explain why they continue to carry out this role. The second question will look at the different issues which have arisen within existing carer research, constituting Chapter 6 of the thesis. Thus, although seven interviews conducted are insufficient to make serious claims about generalisability, the provision of a detailed explanation of why unpaid care exists as it does allows the possibility for reconceptualising social accounting since the depth of analysis moves us away from mere description. From the Marxist perspective adopted here, there is a need to continually interrogate existing social relations. Therefore, it is essential that carer interviews play a pivotal role in the social accounting provided. Their voices and criticisms of the existing setup in Chapter 7, when combined with the social, legal and financial backdrop provided from previous research in Chapter 6 should allow a richer understanding to develop for the two research questions outlined. It will also show how unpaid care is subject to change through, for example, the increased use of personalisation and personal budgets. Moreover, although not based on observational methods, the research shares the desire which Engels had to obtain “more than a *mere* abstract knowledge” and to “chat with you [carers] on your condition and grievances” (Engels, 2009, p. 9).

From these findings, some possible reforms will be suggested that could help to improve the situation and may be fruitful for future campaigning.

Another aim of this research is to provide and explain the advantages of a Marxist framework's use in an example of social accounting. In addition, it will seek to show how theory feeds into practice.

Given that the central aim here is about redirecting engagement within the accounting literature, it will be shown that Marxist theory is particularly useful in this respect. Specifically, dialectical materialism as an approach gives us a coherent and in depth understanding of how society is continually subject to change as a process of historical development; how the complex totality of social relations must be appreciated; and how this change stems from fundamental contradictions inherent to the existing mode and relations of production. This is useful in theorising engagement since it contests the idea of a fixed "human nature" (or the derivative which involves seeing all the different groups in society as permanently in conflict) which necessarily limit beliefs within academia about the potential for change in society. This body of practice based theory will also allow an assessment of why the capitalist state does not provide for people's needs, thus questioning dominant theories about the state found within even the more critical accounting literature. In relation to unpaid care itself, a Marxist approach prevents us from examining this question in isolation from wider historical developments in society, from disability discrimination and the role of the family. As a result of this connection, this thesis is partly a response to the idea that Marxists simply view questions of oppression as secondary or unimportant. Connected to this, the idea of fundamental contradictions between labour and capital and between capitals allows us to explain the origins of these forms of oppression and why they continue to take place today. The centrality of this contradiction is essential because with respect to unpaid care and unmet needs, it allows us to place the blame where it belongs, thus hopefully shaping future debates about engagement. Indeed, the fact that fundamental social change is held to be both possible and necessary is central to the argument that the ill treatment of unpaid carers and the people they support is not fixed and can be changed.

Specifically, this social accounting will be located in the need to engage with concepts of accountability. By showing oppression, exploitation and the unaccountable nature of the existing setup we open the door for alternative understandings and practical struggles for reforms. Arguably, this type of social account has been present since Engels' (2009) account of factory workers in his "Condition of the Working Class in England". To counter some of the misconceptions of Marxism, the methodology section

outlines the link between theory and practice and explains that Marxism, whilst incompatible with reformism is entirely compatible with fighting for reforms. In addition, the methodology section challenges the idea of a fixed “human nature” and tries to show why capitalism constrains human potential.

## **1.2 Research Motivations**

The research question on academic engagement was selected for a number of reasons. As a political activist and a PhD student, I am conscious of the difficulties in best achieving the sought after radical moment within critical academia. This was most clearly highlighted in a debate between Sikka (2000) and Martens and Murphy (2000) where the former criticizes the latter’s idea that educating people on fund accounting is the best tactic for challenging arms expenditures and the pressures on welfare spending. Of course, it is important to critique accounting techniques but we must tie this into ways of mobilizing the wider populous to campaign together and build up alternative understandings to resist government attempts to sow division (Sikka, 2000). It has also struck me that reformist assumptions although inevitably dominant in society as a whole are perhaps over-represented in supposedly more critical journals and authors. Whilst we should always look for commonalities in struggles for social justice, these theoretical differences are not mere abstract questions but will influence the tactics of academics. Ultimately, it could also have a bearing on how the movements for social change proceed as inevitable conflicts emerge between the interests of the ruling class and those subservient classes held beneath them.

With respect to the decision to conduct a social account of carers in Scotland, this was informed by the experience of working as a volunteer advisor in the Citizens’ Advice Bureau in Irvine. In carrying out this work, it was discovered how long and complex benefit forms were preventing people from accessing benefits and how legitimate claimants were being treated with suspicion and distrust. In talking to carers whilst helping some apply for carers allowance, I found out more about the elaborate maze of benefit entitlement. The lack of support either financially or in terms of care needs was evident and the focus on unpaid care largely stemmed from this experience.

The contribution of critical accounting is both recognised and admired. However, it needs to be recognised that simply critiquing capitalism must be accompanied by

strategies for what we can do, as well as theorising the problems with other forms of engagement. After all, the closest thing to science in research of this type is to make the point in practice.

To do this, this research will provide a practical example of engagement in a practical issue of relevance to people's everyday lives and one which is already part of a widespread debate within the mainstream media. In providing a practical example of engagement, the aim is to shape future engagement. Similarly, the theories surrounding engagement directly fed into the type of social accounting presented. In other words, the lessons learnt from the critique shape the attempt at social accounting.

The volume of information on the question of carers seems to suggest that governments know full well the extent of the difficulties but singularly refuse to act on this information. From this perspective, it becomes necessary for the social account to be both theoretically driven and produced externally from the government in question.

### ***1.3 Contributions to Knowledge***

The literature review will provide a critique of the assumptions underpinning engagement practices, seeking to draw out the different aims and objectives contained or implicit within these works. While recognising that some authors have already started to explicitly theorise engagement (Mouritsen et al, 2002; Ball, 2004; Cooper, 2002), this thesis will build on this work by critiquing existing assumptions from a Marxist perspective to guide future practice.

Furthermore, by providing a brief snapshot of the ecological economics field, the premise that all social accountings are part of the same family is questioned. Although brief, the critique of a particular journal to make this point does not appear to exist elsewhere within the social accounting literature.

While other critical researchers have attempted to argue for reforms in journals or the media (Cooper et al, 2005; Sikka, 2011) explicitly justifying why this is fruitful is not explained over and above the importance of the measure in its own right (i.e. it is socially just, important though this reason obviously is). Therefore, here the unique contribution lies in arguing why struggling for reforms as a Marxist is not an oxymoron.

This research will outline how articulating and campaigning for reforms can be useful in forwarding more radical social change. Therefore, it contests the idea that Marxists simply criticise without suggesting any concrete changes.

The methodology section also explains the importance of historical analysis. This has implications for providing social accountings which only describe what currently exist without questioning why this may be the case.

Many authors seem to touch implicitly on the role of the state. Therefore, a detailed historical analysis of the welfare state and its origins is provided. This attests to how change has taken place in the past with a view to countering contemporary theories of agency today. Welfare is not shown to be rooted in an evolutionary development under capitalism, or as a result of altruism from government actors. In this way, it is a partial refutation of the idealistic assumptions about the state outlined in the literature review.

The literature review and the section on the welfare state then start to theorise the role of public services. Whilst many have commented on how market based accountings are inappropriate for public services, there is often a taken for granted assumption that these public services are there primarily for the purpose of providing a service. Here it is asked why these public services exist and what role they play under capitalism.

In addition, the section on welfare provides an explanation of the thesis' position on reforms and helps to explain why they are not simply rejected as perhaps "inducing political quietism" (although of course, they can play this role). Here, it is suggested that although reforms are temporary concessions, they can be won under certain historical conditions and it is worth fighting to defend these gains against subsequent attack.

Finally, the development of the welfare state also provides a backdrop to the development of health care in the UK. It provides a context for the future politicisation of the caring role which would have been difficult to envisage without this development.

In terms of the form of social accounting provided here, the main contribution is the finding that Carers Allowance was so often not obtained and that although many saw the personalisation agenda as liberating, there were uncertainties about the process. However, perhaps more importantly and not so often touched on in carer research is

the role of the family in reinforcing the care relationship. The interviews were also enlightening in showing carer attitudes to government policy makers and how disillusionment with them can lead to a wider disillusionment with the prospect of social change itself. This is important given that one of the research aims is to encourage campaigning. Therefore, understanding why people may feel disempowered is central to attempting to change this situation.

Perhaps the key contribution, however, lies in the suggestion that explanation needs to follow description in order to encourage agency. The idea stems from the discussion on disclosure in the literature review recognising that if anything some facts without context can be disempowering. It is therefore, not just the “what” but the “why” of care. Carers know the situation is difficult, so the key is to explain why it is like this and what we can do to change it.

Tied to this, a critique of common sense assumptions about why care exists in this way is also provided. In general, the “aging population” thesis is taken to explain why there is so little support provided. Questioning this follows a similar logic to that adopted by Martens and Murphy (2000) who critique the rhetoric about pensions time bombs and relate it to arms expenditure accounting.

Until now there have been no attempts to provide a social accounting for carers in this way and this attempt provides a valuable challenge to the idea that accounting researchers are only interested in costing care and how much, for example, carers save the government.

The attempt at social accounting is also an example of dialectics in practice. By showing how the issue of disability discrimination; the role of the family and unpaid care are intrinsically linked, we gain a better understanding of each one. For example, it seems that most carer research does not explicitly recognise the care issue emanates from the discrimination against disabled people in the first instance. This is an attempt to rectify that and many participants in the research stated this was an important part of why they agreed to take part.

Similarly, in trying to explain why care takes its current form and why so few obtain the carers allowance, a look at the legal texts introducing the allowance give some valuable insights into government motivations. In addition, providing a political economy of care allows us to ask what role this function plays under capitalism.





## Chapter 2: Literature Review

### *2.1 Introduction: The centrality of engagement methods*

Following an announcement in the *Accounting, Auditing and Accountability* journal in 2005 which asks authors to focus on engagement and accountability “from the inside”, we have arguably witnessed a shift in assumptions about engagement and it is important that this is challenged if the project of social accounting is to have any greater impact. The call for greater “theorisation of engagement, change, institutionalisation and managerial capture” (*Accounting, Auditing and Accountability Journal*, 2005), however, is a welcome one and much of this review will place its focus here in the context of examining the theories underpinning engagement. In this vein, Ball (2004) is absolutely correct to assert the centrality of the debate about the “mode of engagement” (Ball, 2004, p. 1033) and it is here that different theories most obviously play themselves out.

It appears that there is a growing number of authors through terms like “engagement”, “respecting difference”, “taking ideological conflicts seriously” (Brown, 2009, p. 313) and “avoiding meta narratives” (Ball and Seal, 2005. p. 465) who are influencing the debate within the field.

For example, Brown (2009) attacks “monologism” from a seemingly progressive perspective arguing that conventional accounting is political and challenging “the idea that finance capital’s point of view...is a valid standard for the claimed ‘objectivity’ of accounting” (Brown, 2009, p. 317). However, in outlining her alternative of “dialogic accounting” we are informed that it “rejects the idea of a universal narrative” and states the importance of “recognising heterogeneity” (Brown, 2009, p. 317). Whilst “respecting difference” could mean a positive commitment to rejecting racism, for example, Brown’s (2009) emphasis here shares with postmodernism a preoccupation with dismissing “grand narratives”. As a result, instead of seeing the general and the specific as fundamentally linked, society is portrayed as “fragments”, all competing for their own voice. This can be demobilising since perpetual conflict in society is taken as a given. This gives us some warning as to the inevitable attacks on Marxism which so often follow evidenced through a fleeting reference to “false consciousness”.

Vanguardist attempts to rescue people from their false consciousness – no matter how progressive the intentions – *can amount to another form of authoritarianism...we need to avoid suggestions that people are only 'enlightened' when they 'agree with us'* (Brown, 2009, p. 317, emphasis added).

While some authors attack “monologue” as another form of authoritarianism, they often have theories of their own about how to achieve change and what type of change is possible within society. If, for example, an author puts forward a pluralist model of society this hardly makes you authoritarian. In other words, is it undemocratic to have an opinion? Indeed, these same authors are very clear about what they are against, presumably implying that one theory is preferable to another despite the postmodern underpinnings of such work.

The consequence of much of these postmodern influences is to muddy the waters so that society is seen as so complex that no-one can quite grasp it and assessing the way forward is thus meaningless. The discussion therefore is mixed in obscure philosophy and relatively abstract and questionable contentions about liberal rights coupled with idealistic visions of the state (see Ball and Seal, 2005; Lehman, 1999; Carnegie and West, 2005) and the accounting profession (Brown, 2009; Kuasirikun, 2005).

This arguably leads to hesitancy about being explicitly political, or perhaps an implicit acceptance of dominant ideologies. Thus their own underlying assumptions about the social world and how we can go about changing it are often left without explanation.

In response to this, this literature review will provide a critique of the ideological assumptions underpinning engagement practices, seeking to draw out the different aims and objectives contained or implicit within these works. The lessons learnt in providing this critique then allow tentative suggestions to be made regarding the best way forward for the social accounting project.

Here, meaningful social accounting is located in opposition to dominant Corporate Social Reporting (CSR) practice. In looking at why social accounting has moved away from its more radical incarnation, we ask whether the prominence of CSR led social accountings are an example of successful interventions or simply reflect the ease with which shifting consciousness can be co-opted by dominant capitalist power. Furthermore, by providing a brief snapshot of the ecological economics field, the premise that all social accountings are part of the same family is questioned. The next

section then looks at how the often inherent assumptions about how to achieve progressive change leads many authors to highlight disclosure and accountability as their main aims. Whilst many of these appear to be desirable aims, the difficulty arises when it leaves unquestioned the existing means of production with the underlying belief that these goals can be achieved while the rationale of capital accumulation and profitability remain intact.<sup>1</sup> However, rather than simply reject these concepts, we suggest a theoretically grounded “redefine and redirect” strategy to perhaps put them to better use.

Many of the problematic assumptions about agency also lead to a focus on privileged others to act on behalf of the mass of people. More specifically, a misspecification and misunderstanding of the capitalist state often has very important consequences for the conclusions and explanations reached. This is tied in with the erroneous conclusion that it is quite reasonable for us to “work within” the system with the implication that this is as or more effective than engaging and aiding social movements (see Brown, 2009; Ball, 2007).

The review then reasserts the need to evaluate the best way forward, citing positive examples in the literature and outlining a few key points that feed into the example of social accounting provided here.

## 2.2 Social accounting

In seeking to locate the form of social accounting proposed here, this section will attempt to theorise social accounting. After locating meaningful social accounting in opposition to conventional accounting practice, we will look to its historical origins. Whilst its development in a context of radical ferment meant it was often carried out in opposition to dominant interests, what many still identify as social accounting has shifted to self disclosure and the legitimisation of existing practices. In examining why this shift may have taken place, we can gain important insights about whether business led CSR social accountings can be considered successful interventions or examples of capture within the dominant paradigm. Moreover, the idea that all social accountings can usefully be thought of as part of the same family is brought into question. By

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<sup>1</sup> This idea is covered in more depth in chapter 3 in the sections on economics and reformism which explains the central contradiction which exists between the needs of capital and labour under a capitalist mode of production.

providing a brief snapshot of the ecological economics field as an example, it is suggested that there is a price for this false unity. In so doing, an argument is made for redirecting engagement towards the more critical project.

### 2.2.1 Social accounting as “not accounting”

Of course, by looking at the limits of accounting, all this gives rise to the valid question of what we *can* do. Here, it is argued that social accounting is at least partially borne out of recognition of the role of conventional accounting practice. This is particularly apt today as accounting itself becomes increasingly market orientated. Neoliberal reform means that the regulatory function represented by the state and the accounting profession is replaced by a more brazenly pro market logic. Accounting is increasingly seen as a plaything of corporate interests and the suggestion here is that this makes changes within accounting itself all the more difficult.

In terms of responding to this, the first and most obvious point is the recognition that much of the “social accounting” project is dismissed as being “not accounting” (Gray, 2002, p. 688). Whatever the intention, the impact of this is that authors are preventing debate on procedural grounds, rather than engaging in the political discussion at hand. Definitions here are contested.

If by accounting you mean information motivated by guiding investors to the most profitable use of their funds or for management decision making then social accounting in the more radical manifestations forwarded here is “not accounting” and nor, it is suggested, should it be. That is not to say that the political issues raised in even more radical social accounts are simply ignored by investors. The very fact of being exposed may suggest the need for management to be seen to be countering or managing the worst excesses highlighted. The potential for social disquiet targeted at a particular corporation may suggest negative impacts on future profitability in terms of, for example, greater government regulations. The point, however, is that the logic of this form of accounting cannot be *fundamentally* changed without a complete change in the underlying economic system.

However, if by social accounting you mean providing an assessment or measurement of the social impacts and material conditions and “lived experience” (Sikka, 2000), then it is accounting in its entirety as is providing explanations for the existing state of affairs.

In reality, what is meant by the “not accounting” line is that it is not produced in the business interest.

Therefore, this research locates itself in opposition to the dominant CSR discourse and is part of the critical social accounting project which attempts to make its political and ideological standpoints explicit.

Despite initially locating the origins of social accounting in opposition to conventional practice, we must recognise that the development of social accounting was not written in stone and took place in a particular set of historical circumstances and social struggles.

Having briefly outlined the type and scope of social accounting provided, a short history of social accounting will now follow in order to examine where it emerged from and why it takes its current form.

### [2.2.2 History of social accounting](#)

The question here is why CSR variants of social accounting have developed into such a level of prominence in the current period? Does this represent a successful intervention into accounting practice, or rather is it evidence of the adaptability of capitalism to transform and co-opt changing consciousness for its own ends and to preempt more radical conclusions? Arguably, the development of social accounting from its more radical inception is illuminating in outlining the difficulty in not making our ideological positions explicit.

Much of the dominant discourse and understanding of “social accounting” is entirely in keeping with the business interest. This is evidenced by the International Survey of Corporate Responsibility carried out by KPMG (2011a). This report found that all of the UK’s top 100 companies have a report on corporate responsibility, despite very little if any change in substantive behaviours.

Regardless of how it may have developed since, the starting point for the social accounting project would appear to be its historical origins in the context of radical ferment (Gray, 2002; Cooper et al, 2005; Spence, 2009). As Gray (2002) explains the origins seem to stem from...

...apparent growth in anxiety about corporate ethics, corporate power, social responsibility and ecological degradation. These phenomenon, in turn, were to be understood against a backdrop of significant radical ferment (Gray, 2002, p. 690).

Speaking of the development of “social audit” at this time, Cooper et al (2005) mention how “social audits were carried out by groups external to and without the co-operation of business”. (p. 953)

This context of radicalisation around the 1968 period was increasingly focused on placing militant demands on corporations and a much wider questioning of capitalism itself. As Gray (2002) explains, this included:

...the 1968 Paris riots; the Kent, Ohio shootings; Vietnam and the anti-war movement, nuclear disarmament protests; the emergence of the green movement; Martin Luther King and his assassination; labour disputes and the rise in the power of the trade unions...(p. 690)

Solomon and Thomson (2009) argue that there is evidence that social and environmental accounting emerged as early as 1853. Similarly, Marx’s citation of the “Reports of the Inspectors of Factories” and the “Factories Inquiry Commission” with regard to the working conditions in the new factories (Marx, 1976, p. 398-411) around the same time could well be seen as “social accounts” in this context.

Even if we accept the claim that social accounting had earlier origins than often conceived, what is clear is that this challenging external audit, if you will, came out of a particular material context with the horrors of industrialisation, in the same way that much of the later emergence and debate about “social and environmental accounting” reflected a growing concern about depleting natural resources as well as the radical challenge faced by capitalism during the flourishing protest movement of the late 1960s. This thesis therefore maintains that it was not until the 1970s that the term became so widespread and used more systematically as a distinct field. Indeed, it is claimed that by the 1970s, the SEA project had started to gain prominence (Kuasirikun, 2005). Spence (2009) argues that “formal corporate social accounting really can be understood as having arrived on the scene in the 1970s.” (p. 217) potentially recognising this as part of an “ideological response” to the civil rights movements of the 1960s. This certainly seems plausible. As we entered the 1970s, there was then a

recognisable “explosion of explorations into managerial and corporate social responsibility” (Gray, 2002, p. 690)

Furthermore, as Gray (2002) goes on to point out:

Closer to home – *and for reasons that are still not entirely obvious* – the accounting profession was, by the mid 1970s, *taking surprisingly positive attitudes*, positions, even steps about these developments (Gray, 2002, p. 690, emphasis added).

This included the UK Accounting Standards Steering Committee providing ...

...the most radical re-statement...of how organisational disclosure needed to be enhanced by social and environmental accounting [and] the US profession...actively commissioning and publishing texts supportive of social accounting (p. 690)

Arguably, the resultant embracement of social accounting has come from a realisation that if the company is not seen to be doing something in this respect, others from a more critical perspective will. In fact, in looking at the work of Medawar (1976), this point is explicitly recognised as the first attempt at an “attacking” social account “contributed...to the decision of several other companies to pre-empt any possible outside interference by carrying out enquiries of their own.” (p. 389)

Indeed, although looking at the provision of accounting information to trade unions, Ogden and Bougen (1985) point out that there are many reasons why a company may be interested in increasing disclosure. The first of these lies in trying to obtain “loyalty and commitment to organizational objectives as defined by management” (Ogden and Bougen, 1985, p. 221). We need only consider here the potential that exists to bring fairly radical critics of company actions on to committees and so on, whereby they are then socialised into seeing the process as one of “shared objectives” and maximising their influence. This strategy is partially outlined in a SpinWatch document which explains:

We must understand that for business, establishing links with environmental, human rights, development and Indigenous groups and having dialogue with the opposition is a simple PR technique. I cannot stress this enough. Dialogue is the most important PR tactic that companies are using to overcome objections to their operations (Rowell, 1998).



Connected to this, the second purpose of disclosure in this context can be “emphasizing the technical nature of problems confronting the organization and the role of management as technical experts seeking technical solutions” (Ogden and Bougen, 1985, p. 221). Another possibility is that it allows management to define the terms of legitimate debate with the consequence that the disclosures “reinforce managerial definitions of what constituted problems, and reciprocally disqualify as illegitimate [other] definitions in so far as they significantly depart from those used by management” (Ogden and Bougen, 1985, p. 221). We can, for example, easily imagine a situation in which the company is focused on minimising its “environmental liability” and impact, as opposed to a critic who may well correctly argue that actually we do not desire *any* negative environmental consequences, whether recognised in formal accounts or otherwise.

Given the powerful interests involved, it is hardly surprising that many “stand alone” environmental accounts have been produced by companies under the SER project (Thomson and Bebbington, 2005). A significant part of this response is the recognition of growing opposition to environmental destruction, thereby reflecting the impact of the radicalisation of the 1968 period mentioned earlier.

Another factor in the development of social and environmental accounting (SEA) and corporate social responsibility (CSR) is that whilst it may seem obvious that individual capitalists may have only short term interests, there exists a tension between the needs of short term and long term capital accumulation. To put it crudely, if you destroy the environment sufficiently, this will obviously affect future business for a given state. One example could be the overuse of arable land. Auty (2007) shows this by explaining how “classical economists voiced concerns in the early nineteenth century that natural resources, notably land, might constitute a limit to per capita GDP growth...” (p. 627).

Cairns (2006) for example, mentions the development of social and environmental accounting policy:

Since the 1970s, natural resources and the environment have been the main motivators of extending the national accounts, especially to extend NNP [Net National Product] to incorporate all measurable contributors to social well-being (p. 213).

In this respect, it is also worth noting that in 1993, the UN declared that the environment should be included within conventional accountancy. This was at least partly to do with more scientific discoveries which prompted genuine concern over the future of the environment.

Although it seems unlikely this is the main explanation, it is important to understand this tension and the subsequent debates that surround it. What should also be noted, however, is how quickly any more long term perspective can disintegrate in the context of economic crisis.

Thus, although social accounting may have been initiated from a more radical background, the movement of its development and its subsequent embracement was part of a legitimisation process seen to be required at that time. This is entirely consistent with the claim that the political context and the focus of social accounting has changed. It has been claimed, for example, that whilst in 1975 the social was “more visible and legitimate” and that labour concerns were paramount, by 1985, the economic was almost completely dominant (Hopwood, 1985, p.375) . This idea is then echoed in Gray (2002) who mentions a period which “re-established the economic as the totem criteria of existence” (Gray, 2002, p. 691). This would seem reasonable given the series of important events which took place within this decade. 1975 was just after a Conservative government had been brought down by striking workers and the threat of a general strike. However, by 1985, the embracement of neoliberalism which corresponded with or was symbolised by the election of Thatcher / Reagan in 1979 and 1981 changed the political landscape entirely. In the wake of the defeat of the 1984-85 miners strike in the UK, industrial relations in the country had taken a major shift which is still felt to this day. Although the outcome of this strike was probably after Hopwood’s (1985) paper, the landscape has worsened since. Many struggled to come to terms with this and as employees across the country continued to suffer defeats on pay and conditions, it is perhaps unsurprising that the 1990s was dominated by “environmental” concerns rather than “social” ones (Gray, 2002) which are often mistakenly seen as separate and distinct.

It seems that from perhaps more radical origins, the “social accounting” project has, in general, shifted away from external critique to one of disclosure from the corporations themselves. Increasingly, the assumptions have been those of neoliberal economics

and these papers can only be considered “social” in the sense that the “social” is co-opted into the needs of business.

When we consider the historical development of social accounting in this way, it becomes more obvious why “social accounting” is such a heavily contested terrain. Those with more progressive political leanings, who have much in common with the perspectives and motivations developed here, have attempted to disassociate themselves from it as a result. Some authors, for example, speak of “emancipatory accounting” (Gallhofer and Haslam, 2006b, p. 920) and Tony Tinker classifies himself as a “critical theorist”.

### 2.2.3 Debating Definitions: The two souls of “social accounting”

From such a broad definition as “all possible accountings” (Gray, 2002), there is no reason why works in the “Ecological Economics” field are any less examples of social accounting than any more critical works would be. However, this poses a real difficulty. If there is no ideological break from the dominant neoliberal paradigm, a field ostensibly about “ecology” can simply play the same function and role as conventional accounting, with the focus almost entirely on eco-efficiency gains and win-win scenarios. It poses the question of how this “accounting” differs whatsoever from the convention. This section hopes to show the dangers in defining Social and Environmental Accounting (SEA) in such a broad way since the inevitable result will be to replicate the dominant economic theory. Of course, forwarding a middle ground position on social accounting has to contend with the fact that this middle ground shifts consistently in different social contexts (Tinker et al, 1991). By definition then you end up tailing dominant assumptions rather than challenging them. Furthermore, attempting to present everyone within the SEA field as having a “common interest” obfuscates the different aims and objectives theorists may have and ensures that more critical voices are silenced and marginalised. Put simply, are all attempts at “social accounting” part of the same family to be celebrated, or, as suggested here, is it meaningful to critically assess the most useful way forward for the project in forwarding social and environmental justice?

The SEA project has been recognised as a diverse field (Cooper et al, 2005; Gray, 2002; Hopwood, 1985) with various descriptions ranging from the “preparation, presentation

and reporting of information about ‘social’ factors or conditions” (Ball and Seal, 2005, p. 455) to the widest range of “all possible accountings” (Gray, 2002). Indeed, SEA has been described “encompassing reviews of organisational social and environmental reporting; stakeholder reactions to disclosure; discussions about new systems of accounting and the role of accounting; social and environmental audits; development of theory and a discussion on method and methodological issues” (Deegan and Soltys, 2007, p. 75). It would be reasonable to assert that there are many different views on the direction the SEA field should take, whether it should focus more on environmental or social arguments and whether it should work within the existing market setup, or actively campaign against it.

It seems clear that there is some confusion and incoherence when reviews of the SEA field are given and much of this comes from what “the field” is deemed to include in the first place. It seems clear that certain forms of SEA *can* be a challenge to the convention (Gray, 1998) as well as being involved in exposing the consequences of conventional accounting without necessarily having a clear view of an alternative (Gray, 2002). It has been claimed that social accounting has a “progressive edge” (Cooper et al, 2005) but, again, it is essential to be clear about what we mean when we speak of SEA. As Gray (2002) points out, there are potentially many forms of social accounting, each deserving of its own review.

To attempt to clarify the debate, there will now be an analysis of some variants of social or environmental accounting. By exposing the less “progressive” types, it is believed this will encourage people to make their political choices more explicit and to recognise this debate as *political* in the first place.

There are many limitations within this field. It is perhaps more “self conscious” (Gray, 2002, p. 688) than many due to the amount of criticism it has received. This seems likely to be a reflection of the contradictory nature of “social accounting” as a project and uncertainty about the theoretical direction, aims and scope of the field itself.

What has been described as “*the* social accounting project” (Gray, 2002, p. 699) representing the more critical perspectives is very useful in attempting to move forward as is Spence’s (2009) separation between CSR and the rest of the social accounting project which explicitly challenges existing structures. Such clarification

allows us to forward the emancipatory potential of these accounts without adopting a strategy that will simply lead to frustration and disillusionment.

For the purpose of this paper, it is this more radical critical project which animates the social accounting provided.

#### [2.2.4 Ecological Economics – the future of Social Accounting?](#)

To show how this more progressive notion of “social accounting” is not the dominant use of the term, this section attempts to show conventional theorising and its flaws as presented in the wide number of recent papers in the “ecological economics” field, which guides and feeds into much mainstream accounting thought.

Whilst early works (Grojer and Stark, 1977) focus on other social questions in line with early social audits (i.e. not solely the environment), contemporary works, by and large, focus only on this. Where examples of accounts which are broader in their horizons do exist they are often only found in the most critical journals and are far more marginal to the mainstream debate. By necessity, therefore, much of the attempts at engagement cited in this section are found in these environmentally focused papers. However, this is very useful as much of this work shows the difficulties inherent in pluralist theorising. Such lessons are of direct relevance to any social accounts (environmental or otherwise) and to the form of social accounting developed here.

A very brief snapshot of the ecological economics field shows how the blurring of the lines over what “social accounting” actually constitutes and what our research aims are pose a very real threat to what for many may be an admirable commitment to “democracy”, “accountability” and “social and environmental justice”. Ecological Economics put forward their remit on their website.

The journal is concerned with extending and integrating the study and management of ‘nature’s household’ (ecology) and ‘humankind’s household’ (economics). This integration is necessary because conceptual and professional isolation have led to economic and environmental policies which are mutually destructive rather than reinforcing in the long term. The journal is transdisciplinary and methodologically open.

Arguably, this does not tell us a great deal but the idea of mutually destructive economic and environmental policies absent from discussion of structures gives some indication of the political assumptions which guide the journal. It may not follow Milton Friedman but the frame is sufficiently narrow to make more systematic analysis less likely.

This journal is examined in the context of the increasing crossover between those in the critical accounting fields and “ecological economics”. Prominent authors such as Brown and Bebbington, for example have now written in both *Critical Perspectives on Accounting* and *Ecological Economics* so there is clearly some continuity between them. Of course, authors will write in more than one journal. What makes this surprising is the political gulf that formally separates these two journals, even if some papers seem to be just as good a fit within Ecological Economics as they are in Critical Perspectives on Accounting (see for example Gonzalez and Bebbington, 2001).

In an attempt to pull out the different theoretical positions underpinning much “social accounting”, we will look at arguments which presumably the more radical theorists would find problematic.

It is also “better to know what one is up against” (Sikka, 2000) assuming here that we do indeed wish to follow in the tradition which seeks to critique the convention (Gray, 1998; Gray 2002). It is believed here that this “ecological economics” field shows clearly some of the problems in simply adding a prefix and expecting that to make something “social” or “ecological”.

The presence of an economics journal dedicated solely to the “environment” is undoubtedly an interesting development. Given the views presented within this journal, it should be relatively clear that on these grounds alone, SEA and CSR will be no challenge to the powerful. For example, the International Survey of Corporate Responsibility carried out by KPMG (2011a) found that all of the UK’s top 100 companies have a report on corporate responsibility.

Indeed, a telling point in much of the ecological economics field is in the constant and misleading mention of the “social”. The first instance of this is found in the idea of the “social accounting matrix” (Morilla et al, 2007; Wissema and Dellink, 2007). Unsurprisingly, this is a reference to a standard positivist model, where we are presented with causes and effects which themselves are reduced to mathematical

variables. The consequence of this is to completely ignore the wider social context which leads to various erroneous and poorly justified conclusions.

The second indication of apparent concern with the “social” is found in the almost constant reference to “social welfare” (Azqueta and Sotelsek, 2007; Auty, 2007; Cairns, 2006), which invariably equates to Gross Domestic Product (GDP) or Net National Product (NNP). Indeed, it is from this perspective that much of the positivist domination derives, since other “factors” or “variables” are only ever permissible in relation to their impact on this very narrow definition of “social”. This reference to GDP as a marker of “social wellbeing” or “social welfare” seeks to obfuscate the existing distribution of wealth in society since the billionaire and the impoverished appear as equals in this all encompassing “equation”. With the share of labour: capital now at historic lows<sup>2</sup>, this method is even less appropriate now than it has ever been in reflecting the “lived experience of the people” (Sikka, 2000).

The standard criticisms of the conventional accounting and economic theory from the SEA field largely apply, with a clear focus on positivist, objective research (Auty, 2007; Azqueta and Sotelsek, 2007; Cairns, 2006; De Beer and Friend, 2006; Morilla et al, 2007; Pulselli et al, 2006; Vardon et al, 2007) where the economic is often the sole criteria on which to base decisions.

In addition, there is often reference to “efficiency” (Morilla et al, 2007; Vardon et al, 2007) and effective management in the use of resources (De Beer and Friend, 2006; Pulselli et al, 2006). In this way, the debate is shifted from the reality of the worldwide abundance of resources like food, for example, to the idea that if we could simply increase productivity we could all benefit. The reality is that we produce enough grain to provide everyone with 3500 calories a day. If we consider other foods, there is enough to provide a pound of fruit and vegetables and a pound of meat, milk and eggs (Lappe, 1998). Most people simply cannot afford to buy the food and in many of those countries where there is widespread hunger, they are net exporters of food (Lappe, 1998). It is the workings of the market, not the amount of food that is the problem. This ideological defence of the manufactured scarcity within capitalism is one of the most enduring arguments limiting the terms of legitimate debate and diverting focus away from the capitalist system which causes the problems in the first instance.

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<sup>2</sup> As Stephen Roach, chief economist at Morgan Stanley stated in the 2007 Davos Summit “Look at the shares of national income in the major economies of the developed world. The share going to labour is at historic lows; the share going to capital is at historic highs.”

What is perhaps concerning, however, is how these terms continue to influence the debate within the SEA field. Gray repeatedly recognises this with reference to “pragmatism” and “political self-discipline” whilst others speak of the importance of “tempered radicals” (Ball, 2007). The ideological tools of the ruling class continue to frame much of the debate and we would be wise to acknowledge and respond to this.

This section has sought to show how social accounting was initially derived as a radical response to the inability of conventional accounting to cover questions of social and environmental justice. However, this initial radicalism was then largely neutered by the decline of the more radical moment and the related proliferation of social accounting conducted by and for the interests of large corporations. Often desperate to maintain “the project”, instead of challenging this divergence it has often led to a very broad conception of what social accounting can entail, therefore blunting its emancipatory potential. This is partly evidenced by the works in the field of Ecological Economics, who by the broad definitions adopted for social accounting are still a valid part of social accounting theory and practice. This is despite its substantial divergence from what many in the more critical accounting journals would usefully describe as “social accounting” proper (Gray, 2002). The next section seeks to build on these insights by arguing that rather than avoiding political debate by reference to vague concepts of “accountability” and “disclosure” to maintain a false unity, we should outline the political assumptions and standpoints within our work making our political assumptions clear.

### ***2.3 Clarifying aims and objectives***

Part of the problem lies in not making our end goals explicit, and so the focus on “accountability” and “disclosure” are problematic without explaining why we are interested in these questions in the first place. In a similar way to how “social accounting” can be made so broad as to blunt radical potential, these terms are granted positive connotations despite their inherent vagaries. Are these concepts useful in their own right or are market logics dictating their dominant usage? This section seeks to examine each of these concepts in turn in order to show how their vague prescriptions can tend towards very different political conclusions. However, rather



than simply rejecting these demands, here, it is argued that more radical theorising and use of these concepts can challenge dominant class interests but that this requires research to be theoretically driven. With this in mind, the next section will look to the discussion on accountability.

### 2.3.1 Accountability

In making an argument about who is responsible and what they are responsible for, accountability research and its emphasis has important implications. In a sense, the social accounting provided in subsequent chapters is a means of holding governments to account so clearly there is a broad spectrum of what accountability discourse can entail. The relevance of accountability here lies in understanding the need to struggle for reforms in the here and now, and in so doing building practical unity. It also highlights the unaccountable nature of the system we live under and opens up new ideological understandings. This section thus feeds directly into why articulating possible reforms is potentially fruitful. Therefore, the aim is to shift the emphasis of existing accountability research and show the importance of theory in this respect.

Although some authors have spoken of the difficulty in defining accountability (Cousins and Sikka, 1993; Sinclair, 1995; Andrew, 2007), there seems to be some kind of consensus over the idea that it is about “giving reasons for conduct” (Broadbent and Laughlin, 2003, p. 23), or the “exchange of reasons for conduct” (Messner, 2009).

More broadly:

To say that someone should be accountable for particular events or actions is to hold certain expectations about what that person or organisation should be able and obliged to *explain, justify and take responsibility for* (Cooper and Owen, 2007, p. 918)

However, this would seem to contrast quite markedly from the definition found in Carnegie and West (2005) who cite the Australian Statement of Accounting Concepts (SAC2) who explain that accountability is:

...the responsibility to provide information to enable users to make informed judgements about the performance, financial position, financing and investing, and compliance of the reporting entity (p. 915).

From this difference in emphasis, it seems reasonable to ask that even if we accept the broad idea of explaining actions and taking responsibility, this does not solve the question of who is accountable and to whom they owe an account.

One author, for example, speaks about how the concept is often used to “make *people* more accountable” (emphasis added, Vamosi, 2005, p. 444) and thus can play a central role in scapegoating. It should seem obvious that this kind of accountability can be useful for ruling class interests. For example, even if it is focused on individual dictators (Mubarak in Egypt); “reckless” bankers (Fred Godwin), or fraudulent accountants (Andrew Fastow, former Enron CFO) if caution is not exercised all this can simply deflect from underlying causes of what wider social factors led to these individuals actions and how, in fact, many of these actions are far more generalised than readily acknowledged. However, at least in this case, the focus of these forms of “personal accountability” bring people together in a progressive sense articulating wider social disquiet about those who control society. The flipside of this is where, under neoliberalism, working class individuals are all responsible for their own fate and here the emphasis is on the unemployed “taking responsibility” or the rioter who breaks a window in London. Clearly, the political consequence of this type of accountability is quite different.

Whilst it has been argued within the pluralist model that the key for achieving accountability is to achieve dialogue and consensus between stakeholders (Unerman and Bennett, 2004), in this research a different position is taken.

As pointed out elsewhere there is “a lack of day to day control by the voting public, who have power to elect these bodies [governments] in western democracies but not a power to dictate practical action” (Broadbent and Laughlin, 2003, p. 23). These authors also go on to point out how “external bodies” are used to grant the government legitimacy rather than genuinely holding governments to account. More than this even, since we live in a world of unequal power between classes, here it is argued the emphasis *should* fall on those who do wield power.

We have to recognise that arguably the very concept of accountability comes from two different and conflicting angles. On the one hand it is about holding management of corporations accountable to ensuring the maximisation of surplus. However, on the other, the more progressive arguments stem from the fact that most people *do not have*

any control over decisions that are made supposedly on their behalf and in their interests. The discourse of the type of accountability that more critical theorists would presumably wish to engage with thus stems from a lack of power over society and their lives in general. In other words, we must be clear about why we are interested in this question of accountability in the first place.

Therefore, it is perhaps helpful to separate out the idea of accountability in a purely financial sense (maximising returns) from a broader accountability to the public in general.

It has been highlighted that the focus on accountability is linked to a reformist project for social change rather than in and of itself suggesting a radical alternative.

For example, the interest in accountability...is an attempt to reform capitalism and make it more democratic... [and to] ameliorate and control for the worst manifestations of our current systems of financial and economic organisation (Gray, 2002, p. 371).

Unfortunately, it has been recognised that “decisions made...have unregulated social effects that cannot be encompassed by an individual company SEAs” (Cooper et al, 2005, p. 953).

Medawar (1976) shares many of the same assumptions about the potential for a peaceful coexistence between capital and labour stating that:

We have...a democratic bias. We believe that corporate power should be exercised to the greatest possible extent with the consent and understanding of ordinary people (Medawar, 1976, p. 390)

Doubtless, however, you can see the contradictions in this idea of shared interests between “corporate power” and “ordinary people” as Medawar (1976) goes on to recognise:

What has not changed fundamentally is a system which allows, and to some extent encourages the abuse of secrecy, and therefore the abuse of power, to the consistent disadvantage of employees, consumers and everyone else affected by what a business does (Medawar, 1976, p. 390).

Faced with this reality, you might expect a change in emphasis, feeding perhaps into more critical forms of engagement. However, this is clearly not always the case.

Accountability in practice requires full democratic involvement where people are subject to recall and can be immediately replaced if they do not carry out their mandate. It requires active participation in the major economic decisions. Therefore, from the position adopted here, it is impossible to achieve genuine accountability under capitalism whilst society is divided into two conflicting classes whereby one class decides for the other what will transpire. However, exposure can be useful as part of a wider social movement ensuring that corporations or governments are “held to account” for their action or inaction.

What is becoming increasingly noticeable is the growing awareness that the concept of “accountability” should be applied to more than just the private sector as is evidenced by Unerman et al (2007) who look into the concept in private, public and NGO settings.

Indeed, an increasing number of authors are taking on issues of governmental accountability. The works of Andrew (2007) on the treatment of prisoners in Australia; Broadbent and Laughlin (2003) in examining PFI in the UK and the paper by Cooper et al (2005) in showing students financial situation and experience of work in Scotland are all excellent examples of this.

With respect to governmental accountability, Carnegie and West (2005) point out the problems in accounting for the public sector in the same way as the private sector where the need to provide a service means that simply placing monetary values on everything may not be as easily justifiable.

Again, the key is in how the concept of “accountability” is being used. In the current context, for example, the focus on public sector accountability could easily play a very regressive role if it is purely a way of asking, for example, whether wages are being held down sufficiently or if staff are meeting certain market driven targets. A different question would be whether the level of services provided are adequate (Carnegie and West, 2005) and if not explaining, justifying and giving reasons for why this is the case.

In the context of the current research, this social accounting responds to Rob Gray’s (2002) call and focuses on individuals, households and families, thereby providing an account of their “lived experience” (Sikka, 2000). However, at the same time, by

highlighting weaknesses and limitations in existing service provision this social accounting simultaneously becomes a means by which governments are assessed and held accountable.

However, given the separation of powers under the current Scottish settlement, a good question is which government we are holding to account. Crudely put, the answer is both. Whilst responsibility for health care lies with the Scottish government, the UK government is responsible for the existing benefit rules. To understand the situation effectively we must look to the responsibility of both Westminster and Holyrood.

This section has sought to examine the varying political manifestations of accountability. By placing demands for accountability in the context of an unaccountable political system, the argument made here was that we must attempt to refocus the discussion of accountability towards those who have economic and political power in society, thus constituting a vital debate about the limits of capitalist democracy. In the context of neoliberal reform, the definition and focus of accountability has been subject to change, with accountability more and more being synonymous with having an accountable workforce evidenced by the myriad of departmental or workplace reviews which have proliferated to serve this aim. The next section arguably is a development of the same line of thought in the sense that “disclosure” is one aspect of “accountability”. However, accountability encompasses much more than just the provision of information. In a similar way to asking who is accountable and for what, this section will ask what is being disclosed and the motivations for doing so.

### [2.3.2 Disclosure](#)

Another common theme within the social accounting field is that of disclosure. In a similar way to the two preceding sections, the reason and motivation for placing emphasis here is paramount. Specifically, disclosure discourse often holds the availability and publication of information as an end in itself. However, this section problematises this assumption and suggests that “facts” although an important part of an argument, do not speak for themselves. In this way, the theoretical underpinnings are once again central and this feeds directly into the form of social accounting provided in later chapters.

Arguably, the increased interest in “disclosure” has partly stemmed from a collapse in faith in accounting practice within capitalism post Enron and has increased in the wake of various scandals (Zhou, 2007). More than this even, since the banking collapse and the ongoing context of economic crisis, the idea that regulation and more information about companies’ activities seems to be an area of growing interest. Moreover, it seems oddly self serving that accountants should argue for more accounting following these scandals. It is at least possible that this could potentially guide the debate within the social accounting field with this desire for “disclosure” not driven by demands for “social justice” but by a concern about the *appearance* of legitimacy of capitalist institutions to act in the public interest. Attacking the accountants in this context can simply amount to diverting attention away from an analysis of what causes fraud and why accounting, however altered, is helpless to stop it under a system of competition.

This interest in capitalist legitimacy is certainly backed up by the purposes of some disclosure based research. Zhou (2007), for example, shows how “auditing regulation can permanently reduce long run-information asymmetry risk in capital markets” (p. 616). Therefore, the goal is to ensure market efficiency in a context where the author believes that the main problem was the unavailability of certain information.

A number of authors have also pointed out the disconnect between the emancipatory potential of social accounting and what has been achieved in practice, stating the regressive role it has / can actually play (Kamla, 2007) Specifically, “social accounting and reporting practices...concentrates, in most cases, on the telling of good news and countering the bad news” (Kamla, 2007, p. 108) In looking at Arab companies, the author finds that “reporting appears to be largely undertaken for reputation and image building rather than in support of any serious attempt at transparency or the demonstration of public accountability” (Kamla, 2007, p. 149).

This would certainly seem to be consistent, even with authors from the other end of the political spectrum. Dye (2001), for example, argues that in terms of voluntary disclosures:

Any entity contemplating making a disclosure will disclose information that is favourable to the entity, and will not disclose information unfavourable to the entity (Dye, 2001, p. 184).

Moreover, the timing of disclosures is also of relevance, with Liberty and Zimmerman (1986) finding that negative disclosures often occurred prior to union negotiations. Again, the key thing here is that this is not necessarily achieved through directly providing inaccurate information but by selective disclosure (Neu et al, 1998). Therefore, the key is looking at the *reasons* behind the focus on disclosure in a particular context. One of these lies in trying to obtain “loyalty and commitment to organizational objectives as defined by management” (Ogden and Bougen, 1985, p. 221).

This fits quite well with the idea that “it is often easier to manage one’s image through *communication* rather than through changing one’s output, goals and methods of operations” and that this serves to help shape “external perceptions” (Neu et al, 1998, p. 267). There is thus an attempt to chime with popular views in society through advertisements and other forms of communication. One example may be the Shell advertisements which seek to present themselves as environmentally friendly.

Another possibility is that it allows management to define the terms of legitimate debate with the consequence that the disclosures “reinforce managerial definitions of what constituted problems, and reciprocally disqualify as illegitimate [other] definitions in so far as they significantly depart from those used by management” (Ogden and Bougen, 1985, p. 221).

Again, the findings of Neu et al (1998) certainly seem to correspond to this. In looking at environmental disclosures by Canadian companies operating between 1982 and 1991, they find that:

...the concerns of financial stakeholders and government regulators were associated with an increase in the level of environmental disclosure whereas the concerns of First Nations people and other environmentalists were associated with a decrease in the level of disclosure (Neu et al, 1998, p. 279).

In this way, those groups deemed to be less powerful or important are thus ignored unless it seems likely to lead to greater government regulations.

Even in situations where the focus of “disclosure” based research may appear to be progressive, sometimes instead of mobilising people, the opposite outcome is obtained. For example, on their own, facts about poverty in Africa are not necessarily challenging

that structure. This can as much lead to seeing the situation as a charity case as it can to actively challenging why this takes place in the first instance. Often, these figures are used by politicians and so on to show they are as concerned about these events as anyone else whilst systematically doing nothing to change the situation. Often, the conclusion one draws is that all we *can* do is to mitigate an ever worsening situation.<sup>3</sup>

Also, even where (supposedly more benign) governments might appreciate the “social” they do so in such a way that what is disclosed precludes any possibility for change and if anything disempowers the reader through expectations management. From this, we derive the corresponding economic fatalism that nothing is achievable since there is “no money” where the social totality of other expenditures are ignored. The work of Ball and Seal (2005) touches on this concept in their interviews with local government authorities in England who consistently view their role as continual and ongoing crisis management within short term financial constraints. This idea is also replicated in the work of Martens and Murphy (2000) who look into the media’s role in accounting justifications used to lower expectations about future social security provision in the context of massive arms expenditure. However, the emphasis seems to be that being armed with facts alone will be sufficient to change the situation.

One important element of any research on disclosure, therefore, is the theoretical reasons for placing emphasis here. In other words, what is our ultimate goal? A number of authors seem to be reaching the conclusion that we cannot rely on internal disclosures from either governments or corporations. Therefore, it seems reasonable to suggest that this disclosure must be carried out in opposition to their interests.

This section has sought to argue for making our end goals explicit, and so locate the focus on accountability and disclosure in the context of class division and unequal power relations. It has attempted to show that each concept is problematic without explaining why we are interested in these questions in the first instance and how their

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<sup>3</sup> The discourse surrounding the caring role is one such example of this as will be evidenced in subsequent sections. The projections contained within the Care 21 Report (Scottish Executive, 2006) which ask people to indicate whether they think things will improve or get worse in the future is part of this. In other words, the trajectory is for an ever worsening series of pressures to be placed on government actors and our role therefore becomes one of managing this decline, not radically altering the situation. This notion of “disclosure” is also relevant to the carers research here since the assumption which often underpins it is that the problem is simply that people do not know what they are entitled to. From this you get a “charter for carers” which formally grants certain rights that are then not realised. What this does not address is whether sufficient support is actually provided in the first place even when they actively attempt to enforce these “rights”.



vague prescriptions often tend towards problematic political conclusions. However, rather than simply rejecting these demands, here, it is argued that more radical theorising and use of these concepts can challenge dominant class interests.

The next section will continue this theme of recognising the importance of theoretical clarity in the accounting literature. Specifically, it will examine how certain theoretical perspectives lend themselves to particular forms of engagement which here are held to be less effective in forwarding progressive social change. Problematic assumptions about the capitalist state and accounting institutions will be outlined, explaining that these directly impact on the focus of the respective works.

#### ***2.4 False Friends: Theorising the State***

##### Introduction

This section seeks to look at how authors' engagement is intimately tied up with their theoretical assumptions and positions. Here it is argued that the idealistic assumptions about the capitalist state correspond to an unjustified reliance on it to act in the public interest. Firstly, any concept of the "public interest" is problematic in its own right under a capitalist society animated by conflicting class interests (Cooper et al, 2005). In addition, it is based on the notion that the state is a neutral arbiter which serves no particular class and thus is simply a mediator between conflicting class interests. As a result of these idealisations, these same authors cannot then adequately explain why the state so often does not act in this way. These debates are central to any discussion about modes of engagement since the default option where working class agency is not readily apparent will be to look to those in positions of economic and political power. This tactical bias is then likely to manifest itself as researchers outline the constraints in which state actors find themselves. Aside from encouraging passivity in the short term, developing illusions about the nature of the capitalist state has longer term implications as well. This could well mean that opportunities for more far reaching social change are lost as the capitalist state is given greater space for regrouping, dividing opposition and diminishing the potentialities for a given radical moment.

This section has important implications for the attempt at social accounting provided with respect to unpaid care. An over-reliance on the state might suggest formal reports submitted to government actors or the current care minister as potentially fruitful. Of course, on occasion this could work quite well. However, for this to work it perhaps needs a much greater amount of external pressure, through negative media coverage and so on. In any event, what is also important is the motivation for a submission. If those campaigning on these questions put faith in these institutions, it can be disempowering in the event of a negative response. In addition, in opposition to functionalist perspectives of the state, the contradiction inherent within it suggest that effective targeting of supportive politicians could prove fruitful in certain circumstances.

### Theorising the State

A perfect example of some of the problems in theorising the state can be found in the work of Ball and Seal (2005) who look at local government and “how communities make decisions” (Ball and Seal, 2005, p. 455).

One positive aspect of the paper lies in how it shows neoliberal orthodoxy being translated into ideological justification of poor service provision with councils arguing that they are in a perpetual state of financial crisis. However, here it is held that this deference to short term constraints would be far better recognised as a failure (or success for dominant capitalist power) of “accounting” rather than an example of “enacted social accounting”. The idea of “economic fatalism” (i.e. that we don’t have enough money to provide services) is clearly one that should be explored.

Whilst the authors explicitly state that they were not trying to “reify the local government organisations into some ideal” (p. 469), this would seem to be contradicted by several other statements. We are informed, in relation to local government, for example that, “it is impossible for these organisations to avoid engaging with issues of social justice” (Ball and Seal, 2005, p. 465)

Moreover, it is stated that “they exist primarily for the purpose of the social distribution of societal resources” (Ball and Seal, 2005, p. 458)

Furthermore, by specifically looking at council's budget setting process, the authors seek to "provide a window on *how communities make decisions* about distributing their social resources" (Ball and Seal, 2005, p. 456, emphasis added)

Again, we are informed:

Budgeting in local government is an inherently political process, characterised by a certain logic of democracy, which means that the process has an openness which contrasts with the 'unobservable' (Ball and Seal, 2005, p. 457).

These budgeting processes are said to reflect different priorities over the allocation of resources. It is unclear how they have come to this conclusion or what evidence there is that communities have had any say in these priorities. Expenditure on, for example business subsidies, the extent of local taxation and so on are not commented upon and so we have a very poor (if any) idea of how existing governmental priorities are expressed in ways which are counter to the needs of the community. It seems reasonable to assume that since there exists the greater *expectation* for the provision of services by the state (as opposed to companies), the failure to do this satisfactorily leaves the workings of capitalism open to wider questioning. What the research fails to do, however, is to look at local government within a wider context of central government policy and funding and how local councils could take a *political* stand by arguing that the resources they have are not sufficient and mobilising the local community they supposedly represent.

Whilst the idea of a practical attempt to focus on issues of social justice should be welcomed, the potential for achieving the kind of radical moment we wish to see is completely extinguished. This conception of the local government leads to various erroneous conclusions about the nature of health and education under capitalism as will be examined in more detail in Chapter 5 on the welfare state.

Another example of this type of idealisation of the state is found in Lehman (1999) who uses "modern communitarian thought" to find out if this can "enrich the democratic process" where the goal is to "foster debate and dialogue" (Lehman, 1999, p. 217). A worthwhile endeavour. Unfortunately, the limits of this project are quickly exposed. The author, for example looks to "how the state can foster a participative polis committed to open dialogue and debate". Further he states social accounting could be "constructed in conjunction with a state that monitors, regulates and improves the

quality of information in the public realm.” (Lehman, 1999, p. 234). Again, we fall back into idealistic notions of the role of the capitalist state. This idea is then repeated:

I propose that state-civil society can work together to create participation and a positive conception of freedom where corporations can be made accountable to act in the public interest (Lehman, 1999, p. 219)

Similarly, the civil society is seen as existing outside the state since “a good deal of social life exists independently of the state” (Lehman, 1999, p. 224). Moreover, we are informed that “civil society refers to a space where humanity acts without state tutelage and to the social networks which provide scope for human flourishing and interaction” (Lehman, 1999, p. 224). Whilst trying to distance himself from arguing that this represents an autonomous “public space” and instead putting forward a “third way”, Lehman (1999) seems to make much the same argument.

This path involves drawing out the critical and interpretive dimensions in the public sphere through which understanding and self rule are created in society without deferring to a market, or the force of a modern state. Thus the dialectic between civil society and the state acts as the focus for change, thereby transcending citizen alienation by creating space within itself rather than within the state (Lehman, 1999, p. 225).

This seems contradictory. While seemingly recognising the radical critique of the state, the definition of civil society brings us back to square one. So, in terms of how the state is viewed in the final analysis, we are informed that:

...the accountability model developed in this article is the fruit of open and transparent democratic discussion where the state works in conjunction with the people to develop an active and critically aware society (Lehman, 1999, p. 226).

The author defends his position on the basis that “to hold such a position is “not to deny the possibility that the state can ride over the interests of citizens” (Lehman, 1999, p. 226). In trying to balance between an appreciation of the radical critique of the state and presumably mixed ideas about “continued engagement” (Brown, 2009), the author seems to move between different and contradictory positions. For example, Lehman (1999) correctly asks:

...what democracy and community mean when public intervention and decision making are made by corporations that have no commitment to local economies and communities (Lehman, 1999, p. 219).

Moreover, the warning is that:

...without critically evaluating the role of the state, it is problematic whether...the moderate reforms of accountability researchers can tackle the entrenched interests of corporate power and prestige (Lehman, 1999, p. 236).

However, later in the same article, we are informed that we can use civil society to “discern what is best for our society, what are the goals we want to achieve, and how corporations are to operate in our community” (Lehman, 1999, p. 226). What exactly we are supposed to do, if, in this democratic polis we do not accept the corporations “right to exist” is not clarified.

Putting forward the idea that we need “institutions in both civil society and the state that tackle the globalisation of capitalism” (Lehman, 1999, p. 220) also seems problematic.

More than this, speaking of the aim of the project we are told that “a viable accountability model must provide information of high quality to assist the community to make better decisions” (Lehman, 1999, p. 233).

Therefore, we get ourselves back into a position whereby disclosure on its own is the solution and where a level of democracy is assumed which simply does not exist. Furthermore, what exactly we do with this information once we possess it is not clear when we still have one class with economic power and one without. Perhaps this is seen as the “ideal” but this is not clearly stated. In any event, since it relies on a conception of the state as a neutral body, again, this “ideal” would not be realised.

With respect to theorising the state, sometimes other difficulties emerge. Carnegie and West (2005), for example, in looking at non monetary systems of accountability in Australia and New Zealand state:

If the traditional emphasis on financial information is being found wanting in discharging accountability obligations within the business sector, such an emphasis is even more problematic within the public sector domain of

institutions, such as museums, libraries and other not for profit entities, whose objectives and reasons for being are not solely, nor even principally of a financial character (Carnegie and West, 2005, p. 915)

Whilst this statement may be technically accurate in that they do not “create surplus value”, it leaves untouched the wider role of services under capitalism. This problem is evidenced further when the authors go on to say:

The effective financial management of such entities within their prevailing organisational contexts is not for the purpose of delivering purely financial returns and outcomes, but to enable them to pursue their social objectives with greater effectiveness and efficiency (Carnegie and West, 2005, p. 916).

Actually, it seems extremely debateable whether this is the case. Arguably, there is no interest for a state to actually provide these goods universally, but simply to provide enough so there are sufficient numbers of healthy educated workers and to prevent wider social discord.<sup>4</sup>

This certainly seems to fit with the continuing and ongoing underfunding of school buildings which have not been sufficiently maintained, not to mention community centres and numerous other examples of what are commonly thought of as public goods.

What all this misses is why these services or “public goods” exist in the first place. They are often intrinsically bound up with the development of the welfare state after World War 2. As Chapter 5 will outline, this development was intimately bound up with the interests and calculations of the ruling class at a time of political radicalisation during and on conclusion of the war. Importantly, as a result of these material changes, they are often viewed as a part of the “social wage”. Many people feel that they have a right to access these free of charge. This is often tied in with ideas of community which are threatened when, for example, a community centre or library is closed down. Indeed the contradiction inherent unto public services under capitalism is recognised.

For example:

A hospital that is well managed in financial terms cannot be presumed to be meeting a community’s needs for health care. Likewise, the standing of a

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<sup>4</sup> This will be outlined in Chapter 5 on the origins of the welfare state.

university will derive from the quality of its education and research programs rather than be gleaned from results or trends revealed by its statements of financial position and performance (Carnegie and West, 2005, p. 916).

Similarly, it is hard to disagree with the statement below that:

...effective discourses of accountability must often embrace more than just financial data and that the value of many public sector resources –being not of a financial kind – should not be attempted to be expressed in money terms (Carnegie and West, 2005, p. 924)

However, Marxist concepts of “use value” and “exchange value” may provide a useful way of explaining why this commodification takes place (Marx, 1976). It is only in a context of generalised commodity production that utility or use values (e.g. effective health care provision) become important only in so far as it can be recognised in monetary terms (exchange value). Although the example of health care does not itself directly lead to surplus value creation, the idea is to minimise the cost of providing for a healthy workforce most efficiently. In other words, the social good of health care as an end in itself conflicts with the drive towards creating surplus and the focus on exchange value which this entails.<sup>5</sup>

Whilst the paper, perhaps implicitly, shows the links between neoliberal reform and the state, without going on to talk about the role of competition within say, the education sector where funds are based on research outputs, we surely miss something. There is an implicit theme throughout that the reason for the existence of state provision for health and education lies in actually providing decent health and education as goods in their own right. The source and origins of their expansion clearly need to be addressed as does the role of public services under capitalism. There are, however, some examples of more cautious statements about the role of the state.

Gray (1998), for example states that:

I am now convinced that any suggestions for reform beyond current accounting orthodoxy, however well-meaning, will fall foul of inertia, resistance and disapprobation from the accounting profession, the State, the corporations and

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<sup>5</sup> The concepts of use value and exchange value are outlined in chapter 3 in the introduction to Marxist political economy.

academics if it relies only on decency, sound argument and persuasive evidence (Gray, 1998, p. 208).

Similarly:

The State has little or no incentive to legislate in ways which will challenge...the free working of capital. If this were not so, the polity would probably not tolerate environmental degradation, redundancy, exploitation of the workforce, devastation of Third World [sic] countries or the excessive returns to corporate leaders and shareholders (Gray, 1998, p. 209).

This would suggest that we should directly challenge the state in terms of problematising its role in the whole process of both social accounting and in how it legitimates capitalism as an economic and social system. However, clearly, that would seem to contradict Gray's adherence to a pluralist model of society.

A different approach is taken by Sikka (2000) who articulates examples of how states have failed to provide basic human rights and argues that "critical' research should develop strategies for mobilizing state power" (Sikka, 2000, p. 372).

Sikka (2000) effectively criticises the role of the state in expropriating people's pension rights, and goes on to conclude:

We can learn from the New Right's strategies and try to mobilize the power of the state to advance the concerns of ordinary people (Sikka, 2000, p. 378).

Of course, the "power of the state" plays exactly the opposite role unless it is forced into acting otherwise. Therefore, the question of how we mobilise this power becomes central. In addition, ordinary people are quite different from the New Right in that our interests are not equated with the continuation of capital rule. In other words, we do not have a material interest in developing strategies for greater and more efficient extraction of surplus value so the "New Right" has an advantage in terms of immediate influence.

Whilst the state will compromise under certain historical circumstances, we must recognise the historical origins of the modern state. Since the interests of the ruling class and the working class are diametrically opposed, "new institutions of coercion become necessary" (Catchpole et al, 2004, p. 1044).



In challenging the conception of the liberal state that mediates between classes, however, we must be careful not to move from one extreme (of trying to use the State for our own ends) to the opposite danger of adopting crude functionalism. As Catchpowle et al (2004) explain:

It is often confused with a form of left wing functionalism that crudely asserts all cultural and social forms under, say, capitalism, simply serve to reproduce it (Catchpowle et al, 2004, p. 1038).

In considering why so many critical theorists fall into the trap of believing the state is “neutral” or can move in either direction, we must consider the strategy of the ruling class more generally. As Catchpowle et al, (2004), explains, “consent becomes the form of coercion most favoured...” (p. 1044). It is the *relative* absence of physical force most of the time combined with the ideological hegemony of capitalist production which makes it appear superficially that we have a benign state acting in our collective interests. However, the reality is quite different and is exposed during periods of sustained economic crisis and / or during escalations of political struggle and dissent.

Logically, therefore, if the capitalist state is the expression of one particular classes rule, we might expect that trying to force it to act in our interests is completely fruitless. However, this is not the case.

The very form of the state expresses the fact that the capitalist state is not something above and separate from the relations of capitalist production is itself directly part of those relations. But equally, because the state is not one singular state, it can never represent the ‘whole’ bourgeoisie (Catchpowle et al, 2004, p. 1047).

In other words, because the capitalist state must represent the interests of “capital in general” in one geographical area, it acts against some capitals some of the time. Furthermore, part of the role of the state is to provide the environment in which future accumulation can take place in as peaceful and stable a way as possible. These divisions and contradictions open up the potential for reform (Catchpowle et al, 2004).

In contradiction to earlier works such as Carnegie and West (2005), we must recognise that although “social practices may serve a general social as well as a class function” (Catchpowle et al, 2004, p. 1038) ultimately critical research:

...must go on to insist that the contest over social forms cannot be resolved without their complete transformation (Catchpowle et al, 2004, p. 1038).

This section has sought to outline the problematic prescriptions regarding the capitalist state. Ultimately this poses a question about how theoretical assumptions affect engagement and agency. These theories sow illusions about the functions and operation of the state and therefore can lead to a particular focus on policy makers and so on rather than ordinary people angered about injustice. The question of who we are trying to convince becomes paramount. Since this decision often not only stems from different political positions, the very action of interviewing managers and politicians reinforces the dominant ideologies of those wielding economic and political power. The lessons learnt from this section feed directly into the social accounting provided here. The next section hopes to address these points in more detail.

### 2.5 Agency and working from "the inside"

The previous section focused on the theories within the literature regarding the capitalist state. In this section, the theme of the importance of theorising how academics can more effectively encourage agency will be continued. Firstly, some of the difficulties inherent in strategies seeking to influence conventional accounting will be outlined. Secondly, it will provide an example of how theorists' reliance on political actors acting behind the scenes is based on an underlying assumption which privileges their stated intentions and positively ignores the constraints they find themselves in. If these arguments were accepted, for example, there is no reason why the current research on unpaid carers would not spend its time trying to convince the current care minister alone. Often, these works indirectly and probably unintentionally promote passivity, despite their tendencies towards voluntarism and unlimited agency void of any structural considerations. When faced with inaction or harmful actions from governments the role of exposure to the wider population through the media is important, if difficult to achieve. When academics contribute to contemporary debates on, for example, the mismatch between government rhetoric on stopping tax avoidance whilst blocking attempts to actually do this (Sikka, 2012) there is an implicit

acceptance that external pressure is absolutely key. The point here is not that we should never enlist the help of people within certain institutions (e.g. some politicians), but that we should always critique the rationales and assumptions that they state they are adhering to. In addition, the question of where you place emphasis is important. As part of a wider movement, they can articulate wider interests (e.g. those of carers) but focusing solely on them to achieve change for others will more often than not, lead to disillusionment and disappointment thereby failing to encourage wider agency and self activity.

With respect to engagement, we are informed that “much of the prior and current research in this field has been conducted from outside organisations, bringing about confusion in the literature as to an appropriate theoretical framework”. (AAAJ, 2005).

The lack of engagement from many authors is not in question but the polarisation between working on the inside and not engaging at all is false, opportunistic and does not “risk under-theorisation and corporate capture” (AAAJ, 2005) – it positively ensures it! Indeed people are charged with “abandoning accounting” (Brown, 2009) but what accounting are we abandoning? If it is the conventional accounting routed in neoliberal economics which plays a role only in serving the interests of capital, anyone seeking social change would correctly look elsewhere. This straw man that you can only engage by either a) operating within the organisation or b) hoping that the goodwill of individual accountants and managers will help us achieve progressive change is entirely unhelpful and unjustified.

Although predictably naïve about the social role accounting plays, Solomons (1991) makes an interesting point about achieving social change.

I myself would be happy if teachers and nurses were better paid and business executives, film stars and baseball players were less well paid. But it is obvious that it is society that would have to be changed, not accounting, to bring about such a result. It makes no sense at all to blame accountants for using values determined in the market when they are accounting for market transactions. (Solomons, 1991, p. 289)

Thus we see the potential difficulty when we do not distinguish between conventional accounting and social accounting more clearly.

In this respect, there is a great difficulty here in what the limits of critical accounting theory are deemed to be. When, citing Power (1992), a “reconstituted accounting” (Brown, 2009, p. 315) is mentioned, for example, it is unclear whether this means within the current convention or outside of it. The implicit assumption appears to be that we should place our efforts on the accounting profession itself.

However, the theoretical underpinnings of much of the work in the field are also problematic. For example, the euphemism of being “sensitive to the complexity of power dynamics” (Brown, 2009, p. 315) understates the impact of economic relationships within society. Within this paradigm, we would believe that class is but one of many equally important sources of conflict and this has implications for the subsequent conclusions drawn.

For example, we are informed that:

Some combination of insider and outsider forms of engagement arguably provides the most effective form of praxis for those with social change agendas. This entails some social actors working for change from ‘inside’ (e.g. working with business and policymakers to reform institutions from within) and others working more combatively from ‘outside’ mainstream institutions (e.g. with activist groups). (Brown, 2009, p. 327)

Similarly, the work of Saravanamuthu and Tinker (2003) probably reinforce the notion of “working from within” from their underlying assumptions about the role of management who have “contradictory roles as capital and labour” (Saravanamuthu and Tinker, 2003, p. 37). We are informed that “accounting remains a contested terrain because it is interpreted in various ways to suit the politics of local circumstances” (Saravanamuthu and Tinker, 2003, p. 38). This in itself may be reasonable but the authors go on to state that accounting’s “‘no necessary class belongingness’ provides managers with a certain amount of leeway in either mobilising accounting’s efficiency assumptions in their strategies; or diluting it by accommodating labour’s calls for greater humanisation of work” (Saravanamuthu and Tinker, 2003, p. 38). Undoubtedly, accounting figures can be used for a progressive purpose but the role of conventional accounting is as a tool of control and reinforcement. In any part of the political superstructure there are contradictions and conflicts but this does not mean that conventional accounting is “neutral” between the classes. It is important to realise that

managers may justify decisions to “appease” labour on an accounting basis but that this ultimately stems from struggles between labour and capital. Sometimes, it may make more sense for capital to make concessions to labour, but this is always contingent on the balance of class forces at a specific historical moment, not primarily on the whims of an individual manager. The obvious point should be that managers who give way to labour too often will probably not last very long.

Whatever the functional requirements of accounting may be to serve the needs of a capitalist state, the underlying class contradictions mean that they do not do so unproblematically.

Tellingly, Saravanamuthu and Tinker (2003) also state that “in more recent transformations of capitalism...capital and labour has become even more blurred” (Saravanamuthu and Tinker, 2003, p. 40) which leads them to conclude that “accounting is not a reification of any ideology because managers signify its meaning in different ways to suit their local circumstances” (Saravanamuthu and Tinker, 2003, p. 40).

This fails to ask the question of what decision will be made if labours’ calls cannot be sufficiently justified within an accounting framework and what decisions middle management are structurally prevented from making without explicitly challenging higher levels of management themselves. Ultimately, looking to the contradictory role middle managers may find themselves in is unlikely to help us forward social change.

Linked to this line of argument, it is justified to say that “conventional accounting depoliticises accounting” but what is meant here by “democratising accounting technologies” (Brown, 2009, p. 316) and what would this mean in practice where one class has economic power over another and the subsequent control over production and decision making this entails.

Similarly, by seeking to “foster an accounting that is more receptive to the needs of a plural society; one that is “multi voiced” and “attuned to a diversity of stakeholder needs and interests” (Brown, 2009, p. 317) we collapse back into serving the needs of business. Since they already have economic power why should businesses and investors be part of this accounting? Conventional accounting already ensures their needs are met. Surely the role of social accounting is to challenge the idea that we have

a commonality of interests where business and social needs can be met simultaneously. Brown (2009) then seeks to defend this on the grounds of “continued engagement”.

Accountants need to develop accounting systems that ‘*prevent premature closure*’ and ‘which infuse debate and dialogue, facilitating genuine and informed citizen participation and decision making processes (Boyce, 2000 cited in Brown, 2009, p. 318)

Despite this justification the author accepts that:

Social accounting initiatives have often been met with resistance from both managers and the accounting profession especially where they move beyond “win-win” eco-efficiency agendas. (Brown, 2009, p. 335)

Although the author concedes this, there is no questioning of why this might be the case or indeed whether there should be a different mode of engagement utilised.

Indeed, Spence (2009) outlines how CSR actually strengthens the idea that business and society peacefully co-exist.

The obfuscation is undertaken in a relatively sophisticated fashion by focusing on areas where business and socio-environmental interests coincide, and by carefully controlling and rationalising any areas where they are shown to conflict. (Spence, 2009, p. 211)

A perfect example of where these can be shown to coincide is in the work of Ball (2007) who looks at a council whose “technical capacity in waste management is world renowned” (Ball, 2007, p. 760) where recent changes took place in the wake of massive problems with landfill sites in the area. Ball (2007) accepts that the “waste management principles were still guided by the underlying values of economic prosperity” (Ball, 2007, p. 768) but despite this goes on to talk about the role of “tempered radicals” who look to “small wins in the organisation, whilst engaging and mediating between citizens and social movement groups and the city council” (Ball, 2007, p. 775).

Similarly, in showing an example of education provision for traveller children (Ball and Seal, 2005, p. 466) we are informed of a situation where “enacted social accounting” through acting “covertly” provides a situation where traveller children are provided

with education, not by openly challenging discrimination but by an enlightened elite working quietly behind the scenes.

There are two important considerations here. Firstly, this leaves untouched the wider discrimination traveller children might face in schools and in wider society and the way council policies towards the traveller population affect them, with the limited access to the basic standards of life being one obvious example. Secondly, there is an innate elitism that says oppressed groups in society and the wider population should not be involved in this process but treated as a passive subject, where well motivated individuals in management will take care of them.

It may well be that individuals within the council do not like discrimination but this is not the only relevant factor. Even if you could ensure provision, which is far from obvious, what is the quality of that education where discrimination has been left untouched? When they enter the school does that vanish? Where did this discrimination come from in the first place? In the context of pogroms in Hungary against the Roma community, it seems positively irresponsible to wait for enlightened elites to take care of discrimination for us in this way.

Far from encouraging action and positive social change, this work is disempowering as it makes wider society the passive agent who change is done to, if anything removes their agency and despite talk about looking to both inside and outside the organisation the focus of papers such as these shows no signs of encouraging activity which is critical. Despite statements to the contrary, there is no belief in the critical accounting project which speaks the truth to power, but instead an elitism that says academics and managers will achieve change on behalf of others who lack sufficient education.

In addition, by talking about how social struggle manifests itself within organisations, we focus not on the conflict between capitalist production and social equality but instead look at the world through the lens of management decision making which is concerned with managing the conflict in the best way to prevent resistance and wider questioning and to maintain their own positions within the local government.

By looking at the limits people find themselves in, it is hardly likely that we are going to forward ideas of emancipation. Necessarily, given their social role, people who manage organisations are likely to look at the possibilities of change as limited to their immediate budget, whilst leaving questions of wider financing from central

government and business interests completely untouched. Instead we must expose the reality of life under capitalism and encourage action from the widest possible layer of society including those who provide the services and produce the goods on which society relies.

The next subsection will look at another example of the same basic phenomenon. This section will argue that in looking at the ethical or psychological motivations of individual accountants, we get a very poor understanding of why despite some good individual motivations with respect to social justice, we can obtain the same regressive outcomes.

### 2.6 Accounting for ethics

A manifestation of the voluntarism present in the field is the focus on examining the ethical values of accountants. Much of this argument could also apply to government officials and politicians. Kuasirikun (2005) for example, states that accountants in Thailand have a “positive attitude towards social and environmental accounting” and we should be encouraged by the “latent attitude among the accounting profession which supports a new potential form of accounting which charts a company’s performance over a range of sectors for the benefits of the widest possible body of users” (Kuasirikun, 2005, p. 1053).

Similarly, elsewhere, the conclusion is that we should see “empirical research into the ethical and social motivations of public service accountants and policy makers as potentially fruitful” (Ball and Seal, 2005, p. 471). Regardless of individual motivations, the end result will be that the constraints they operate under and the logic they work towards plays a regressive role in society and works like these often legitimise their wider social role.

However, this is not to say that this research serves no use. Indeed, it is in exactly in showing how little the ethical motivations of accountants influence the outcome within the profession that we gain insights.

Although there are legitimate criticisms of the use of the Kohlberg model, Dunn et al (2003) argue:



The overwhelming impression gained from these interviews is that the moral atmosphere within firms is not so much imposed as taken for granted by all concerned. The nature of the organisation makes it necessary for professional staff to work together in an attitude of mutual trust. That creates the need for a sense of co-operation and sharing of responsibility. It is, therefore, no surprise that partners and staff return P scores that are consistent with a desire to follow rules and structures. *Similarly, it is not surprising that those with higher P scores (who are more likely to question authority) are less likely to remain in such an organisation.* (Dunn et al, 2003, p. 34, emphasis added)

The daily reality of people's everyday experience therefore shapes their behaviour and this is but one useful example of how consent is used within society more generally. Thus, instead of trying to idealise this situation by showing that these are not "bad people" (as Ball and Seal (2005) do with local authority actors), we should be asking why poor service provision or corruption within accounting continue to take place often despite peoples ethical motivations.

Here, it is argued this is at least a partial refutation of idealism, showing how structures affect and condition people's behaviour.

This section on agency has attempted to explain some of the difficulties in relying on management to facilitate social change. Here it was argued that by placing emphasis on the limits they find themselves in, we end up encouraging passivity rather than forwarding social change. The next section will consider the relevance of tactics to attempts at social accounting.

### 2.7 The importance of theory: A tactical discussion

When we consider a way forward we need to consider some assessment of the likely results of the modes of engagement that are adopted. The idea that we need new criteria that doesn't deem interventions as "successes or failures" (Ball, 2007; Brown, 2009) is a convenient one if you are focused on achieving change within the structures that perpetuate the existing social and environmental problems.

In an example of this, Gonzalez and Bebbington (2001) assess whether attempts to achieve change from within a Spanish electricity utility result in "organisational

change” or “institutional appropriation”. Whilst the results would seem to suggest the latter this is not conceded by the authors. We are informed “accounting interventions into the life of the organisation failed to stimulate substantive organisational changes”. However, they go on...

It seems to us that there is a need for researchers to move beyond bald statements about the likelihood that environmental accounting will either succeed or not succeed. Rather there is an array of potential endpoints to any intervention in organisational life with each endpoint arising from a particular constellation of factors (Gonzalez and Bebbington, 2001, p. 288)

In contrast to this, here historical experience is not deemed irrelevant and can help to suggest ways for moving forward. There is a growing acceptance that the SEA project has not achieved its goals of democracy and accountability (Gray 2002; Kamla 2007) and this provides the context for arguments such as this. Here it is suggested that rather than giving up assessment because we live in a complex society we should instead adapt to more effectively meet the challenges.

These contradictions are important to recognise but we also need to place focus on what type of research we believe will prove more fruitful. The next section will attempt to do this.

## *2.8 A Way Forward?*

### [2.8.1 Historical examples](#)

Here, it is argued that one of the best ways forward would be for social accounting to be “hurting”. This would be where they look to directly challenging governments and corporations. This kind of account is found in an example used by Solomon and Thomson (2009) who examine Braithwaite’s Victorian environmental account of the pollution of the River Wandle in 1853.

Another exciting example of a possible way forward is found in the work of Gallhofer and Haslam (2006a) who show how accounting information was used for a progressive purpose in the context of Red Clydeside during the First World War. This example of shadow or silent accounts is clearly one other potentially fruitful means of engagement.

Whilst these works should be applauded for their focus on the consequences of capitalism with all its social and environmental consequences, there needs to be an explicit recognition that these consequences still continue to this day. If we do not relate the historical lessons from such works to the contemporary situation we run the risk of suggesting that such examples are only *historical* in the sense that we have now “moved on”. The ruling class is very willing to concede past atrocities (often by other actors who are no longer around) when there is enough distance from the actual events. We need to remember that whilst historical enquiry is vital, there are plenty of examples of exploitation and oppression available for us to choose from. It is vital that we involve ourselves in these contemporary struggles.

### 2.8.2 Positive examples of “social accounting” and “social accounts”

Critical theorists have played a vital role in exposing the taken for granted assumptions within accounting and then in showing how these assumptions have also impacted on the supposedly more radical social accounting project. However, if we do not then go on to explain and demonstrate how we *can* mobilise accounting to play a progressive role we disarm the emancipatory potential so often talked about within the literature.

In other words, if critical accountants only outline what tactics will not work then you open the door for other less critical theorists to outline their own visions with relatively little scrutiny, as would seem to be evidenced thus far.

Arguably, whether the result of opportunistic interpretation of “social movements” or otherwise (Ball, 2007), it has allowed some authors (Ball and Seal, 2005), to claim we can achieve change from within the organisations and institutions which are part of the problem.

Encouragingly, there are more and more examples of more radical theorising which provides a more effective challenge to dominant interests (Gallhofer and Haslam, 2006a; Solomon and Thomson, 2009; Spence, 2009).

In addition, there are attempts to practically engage with contemporary social issues that expose the reality of the situation and waylay myths of life under capitalism.

One positive example of engagement in this regard can be found in Christensen (2004) who show how the decision to delete Japanese studies was justified and consistently changed. Here, we see how the use of accounting terminology like “viability” can be used to serve a regressive role. To justify the decision, initially student numbers were deemed to be too low. Then, when this was disputed with accounting facts, management changed the reporting period for student numbers and suggested that they had not *increased sufficiently to become viable*.

In light of this, we should be careful not to argue that accounting figures automatically play a regressive role but the reason for their creation and the purposes they serve are vitally important. It is important therefore to distance this research from the position taken by some authors that accounting has “no necessary class belongingness” (Saravanamuthu and Tinker, 2003; Gallhofer and Haslam, 2006a). What seems more reasonable is to state that the problem lies not in the numbers themselves (although the reduction of everything to numerical analysis is obviously relevant as regards commodification) but the social impact and outcome of accounting mobilisations for a specific purpose. Ideally, by using accounting and providing a social context we can provide a strong case for improved provision at the same time as disrupting the hegemonic influence of accounting figures from a neoliberal perspective. Accounting numbers (if not the institutions of accounting) can be mobilised on either side. The point is that it appears management wanted to remove Japanese studies and then attempted to use accounting as an ex-post justification for that decision (Ogden and Bougen, 1985). Often, for example, we are provided not with the idea that cuts are immediately necessary but that in order to prepare for a future financial climate, we must accept them now as the environment will continue to worsen (Martens and Murphy, 2000)

In their work on students for example, Cooper et al (2005) point out the importance of the dialectic and how parts of the system relate to one another.

One would fail to grasp the entire picture if one accepted the argument that with the mass expansion in higher education, we simply cannot afford to give decent student grants (Cooper et al, 2005, p. 957).

A similar logic pervades in health care as we are told we cannot possibly provide the same level of health care to everyone due to the ageing population. In this way,

research which focuses on organisations, without looking to wider social processes will necessarily adopt positivistic assumptions about the potential for change by locking itself into looking at the limits they have placed on them and not the potential for a completely different type of society altogether. This separation aids and abets the superficial appearance which masks the reality of capitalist production and so encourages compliance with the existing structures as people can see no other alternative. These ideological understandings serve to partially remove the need for more direct co-ercion by strengthening hegemonic understandings.

Similarly, Lehman and Okcabol (2005) show how accounting is implicated in our perceptions of crime and how it is absolutely linked to wider social issues of deprivation.

## 2.9 Conclusion

This literature review has attempted to provide a critical assessment of the existing theories underpinning engagement within the accounting and social accounting literature. Each section attempts to show the need for making clear our theoretical assumptions. From this critique, however, each part holds lessons for what a more effective attempt may look like. For one thing, it suggests that in order to forward social change more effectively it must set up social accounting in opposition to conventional accounting practice. Specifically, there is a call for greater theorisation of the role of the capitalist state and notions of agency. However, more generally, there needs to be a clarification of the political aims of many of the works in this field. Where we place our emphasis is always a political decision. Here it is argued, accounting academics could be more effective if they engaged with contemporary issues and, in an extension of a logic developed elsewhere (Cooper et al, 2005) produced accounts external to those with economic and political power in order to inform and motivate campaigns.

There is clearly a need for greater theorisation of the state, public services and accounting (although see Catchpole et al, 2004) and this is one area the research provided here can start to address. Additionally, Gray (2002) states the lack of accounts which consider the individual, family or group as the accounting entity. By providing accounts on the social impact and the lack of provision to certain groups, we

may start to waylay myths about social provision. Although this could take the form of more readily generalisable data (Cooper et al, 2005), the call for more oral histories in accounting (Hammond and Streeter, 1994; Hammond and Sikka, 1996) is deemed to be an interesting avenue for future research and would allow us to start to cut across the numerical dominance with which social accounts can often be incorrectly associated. Whilst generalisable social accounts can be absolutely invaluable, there is also strength in providing social accounts which explain people's experiences in more depth and this research will place its emphasis here.

One way of re-establishing the critical heart of the social accounting project is to show the flaws in the conventional accounts provided and then, from this, provide a practical alternative. For example, we can learn from the works of authors like Bryer (2000a; 2000b) where this type of empirical work could be used to provide anti-accounts on the basis of a labour theory of value where we show the rate of exploitation. Similarly, we could assess profit rates under capitalism to show its inherent instability. These types of accounts if linked in to other groups, made accessible and presented to wider layers of society could certainly serve an emancipatory role. It is vitally important to think about what the best method is for all those in the field concerned with poverty, inequality and social and environmental injustice more generally. So long as theory and practice are combined the suggestion here is for social accounting to attempt to focus on the following areas:

- Contemporary issues of direct relevance to people's everyday experiences.
- Develop and maintain links with social movements to guide future forms of social accounting.
- Explicitly reject CSR discourse to challenge dominant structures.
- Given the problems highlighted with disclosure discourse, try to provide accounts which provide explanation and description and place more emphasis on the former.

In this case, this research attempts to carry out a theoretically driven "governmental audit" on care in Scotland by looking at the experiences of the carers and by necessity the people they care for. The next section will outline the methodological basis for the thesis and how this influences the social accounting provided.

## **Chapter 3: Methodology**

### **3.1 Introduction**

This chapter seeks to outline the methodological position for the research conducted here. First of all, it attempts to explain why partisanship on the question of carers is justified from a Marxist standpoint and that the material experiences of academics influence their priorities and research questions. It then examines how Marxism sees theory and practice as intertwined and how ideas and material reality cannot be artificially separated from one another. This is important in terms of academic assumptions about engagement since otherwise the ideological contestation might be seen as all that was important. In addition, the section on dialectical materialism also argues that, contrary to some of the more postmodern influenced works cited in the literature review, we require a certain amount of abstraction in order to gain purchase on the topic of investigation. This is combined with the need to view the situation of carers as part of a rich totality of social relations, whereby understanding benefit entitlements, the role of disabled people under capitalism and the role of the family become extremely important. Furthermore, it outlines the importance of seeing unpaid care in the context of its historical development and the main “laws of motion” of the capitalist economy. Finally, it concludes on articulating a Marxist position on reforms and attempts to locate the need for the social accounting provided within this framework. It then goes on to briefly outline the possibilities that would be open to us within a different set of social relations.

### **3.2 Marxism as a theory of emancipation**

Given the explicitly political position taken with regard to arguing for greater support for carers, one of the questions that will undoubtedly be raised is that of bias within the research. To understand why this suggestion is problematic, we need to consider the underlying logic of the Marxist method. Marxism is perhaps best understood first and foremost as a theory of liberation (Engels, 1977) or as “emancipatory knowledge” focused on action (Eagleton, 1997, p. 4). It is impossible to conceive of Marxist theory

outside of the context of conflicting class interests. In this sense, there is a fusion of the “political objective” and the “scientific method” (Callinicos, 1998). From this, the desire for understanding society stems from a willingness to build the forces of resistance to capital rule. Or put another way:

It is not just that this kind of knowledge can be put to valuable use, but that the motivation for understanding in the first place is bound up with a sense of value (Eagleton, 1997, p. 4)

Therefore, whilst as a theory it is primarily “instrumental” (Eagleton, 1997, p. 49), an understanding of the way in which capitalism operates is needed if we are to be more effective agents in society. As a result, whilst we must appreciate the importance of the battle of ideas, this must work alongside the struggle to change society rather than be seen as a substitute or alternative. It is thus best understood as the “philosophy of practice” (Callinicos, 2004, p. 78). A fuller rejection of this “idealism” is given in the following section. Suffice to say, it is precisely this unity of theory and practice which defines the Marxist standpoint.

Given all this, it should be obvious at this point that this research wishes to reject “neutrality”, so prized in much of academic life. Not only is this concept of “neutrality” not timeless, but is itself a contingent manifestation of material forces. As Rees (1998) notes, a whole host of historians were “political actors in their own right, including John Milton (Secretary of Foreign Tongues under Cromwell), Edward Hyde (a future Earl and an advisor to Charles I) and Edward Gibbon and Thomas Macaulay (both Members of Parliament)” (Rees, 1998, p. 163). This argument is already present within the accounting literature. For example, in their work, Cooper and Sherer (1984) “highlight the emphasis by most accounting research on individuals (especially shareholders) and a concern with market equilibrium” (Cooper and Sherer, 1984, p. 207) which leads into passive acceptance of the existing political setup. As they go on to explain:

Not only is accounting policy essentially political in that it derives from the political struggle in society as a whole but also the outcomes of accounting policy are essentially political in that they operate for the benefit of some groups in society and to the detriment of others. (Cooper and Sherer, 1984, p. 208)



The argument about the “neutrality” of accounting ignores that the very reasons behind carrying out your research and the function your conclusions go on to play are political, whether this is explicit or otherwise.

Cooper and Sherer (1984) therefore helped to show how selective and partially used the concept of “neutrality” can be within academia and, by implication, society more generally. It always appears striking how researchers with every PowerPoint slide apparently sponsored by corporations are the first to argue that someone who states their political objectives explicitly are incapable of carrying out useful research. Moreover, the continued and consistent use of the Taxpayers Alliance in media discourse as some legitimate “interest group” conceals their overwhelmingly right wing political perspectives and their Conservative ideology. All of this, however, is without even touching on the plethora of right wing think tanks which masquerade as “neutral” institutions. As Rees (1998) explains:

Immersion in the struggle is not to soil oneself with the bias of sectional interests, as so many academics assume, but a method of ensuring that the questions which theory poses, and the answers it attempts to give, are shaped by the experience of the working class and socialist movement, not by the priorities of capitalism’s educational hierarchy. To avoid direct involvement in the struggle is not to avoid sectional influence but to replace the influence of the working class movement with that of professional middle class educationalists and their masters. (Rees, 1998, p. 172)

Simply being a Marxist, or being a political activist, therefore, does not invalidate your research but instead is simply a reflection of your willingness to make your political assumptions and standpoints explicit (Ogden and Bougen, 1985). All research is political, intentionally or otherwise since there is always a “purpose and end in view” when collecting and constructing data (Ackroyd, 2004). Thus, whilst it represents an important leap forward in exposing disability discrimination, Duff and Ferguson (2007; 2011) presumably have some sense of injustice in order to want to expose this. This takes place despite the interpretivist framework adopted.

Of course, some may say, that is all very well but what about bias within your research method? Again, the whole framing of this question is misleading. From the topic of investigation to the questions asked to how you use and collate data, everything in

research is based on certain key underlying assumptions either about the social world or about how you obtain knowledge. Whether it is realised or not, you always start with assumptions based on material experience and this can be neither “temporarily suppressed”, nor conveniently ignored.

This explicit partisanship then explains why it is possible both to carry out the research to better understand the situation of carers but also to simultaneously argue for greater support.

### 3.3 Academic Marxism

Academic Marxism can be summarised as privileging the appearance of “neutrality” and on “the lack of contact with social forces of any description” (Rees, 1998, p. 161). The need for neutrality thus can then be used to justify non involvement in political actions. Often, rather than seeing theory as a necessary correlate to effective activity, it is instead seen as an end in itself. This has enormous potential to “undermine social change agendas” as stated in the research question and so it is important it is addressed. In contrast, from the position adopted here, it is precisely this focus on activity, on the necessity of combining theory and practice that separates this research from any form of so called “academic Marxism”. For example, it could correctly be argued that carrying out interviews and spending time with carers more generally, impacts both on the research questions and on the motivation to continue with the research. Here, the argument is that rather than this representing a problem, this engagement with the oppressed and exploited is essential to prevent us becoming what Sikka (2000) calls “prim disinterested academics”. The material source of this “academic Marxism” lies in the development of capitalism and the consequent disconnect of academia from the outside world (Rees, 1998).

As explained briefly in the literature review, another way in which more radical manifestations of social accounting can be undermined is in the argument that it simply is “not accounting”. Largely the increasing “specialisation” taking place is a part of the ideological apparatus of capitalist domination, since it keeps theory relatively safe and largely prevents a more wide scale appreciation of how society operates. This has more recently been combined with a concerted attack on certain disciplines seen to be

not directly relevant to future employment and the extraction of surplus (e.g. community education; music; arts; sociology and history).

This specialisation and increased narrowing of the academic field limits the number of legitimate questions which can be asked and seriously limits the potential answers, since everything appears as self contained. For example, Bryer (2006a) overstates the role of accounting and its objectivity leading him to state “that rather than strive for worker control of production, activists must strive for worker control of the valorisation process” (Bryer, 2006a, p. 594). In other words, the key thing is having control over accounting processes and not democratic control of the workplace. This in itself is a classic example of how the idealism within the academy can have a corrupting influence.

This increasing compartmentalisation fits well with both the theory of positivism which sees facts as speaking for themselves and postmodernism with its praise of the “fragmentary”. This also chimes to some degree with academics themselves who can then be an “expert” in a particularly narrow field and thus fits well with the need for “professional status” (Rees, 1998).

This material experience of academic life is essential. In much the same way as these subjects superficially appear as self contained entities, serving to prevent a wider critique of existing capitalist hegemony; ideas themselves appear as the motor force of their life. This, again, fits well with capitalist development since theory on its own, isolated from practice is no reliable threat to dominant interests. Of course, that is not to argue that ideological contestation is irrelevant. Many would surely identify with the experience of hearing more radical teachings for the first time within some part of the education system as having an important impact on how they interpreted and engaged with the social world. The point is that ideas are connected to practical life activity and not separated from it.

An example of the kind of shift required is perhaps shown in the work of Bourdieu who after having his suggestions for change of the Grand ecole system ignored by the Mitterrand government, focused on developing further the concept of the “collective intellectual” where academics work as part of social movements (Cooper and Coulson, 2013). In Bourdieu’s case his involvement in the strikes of December 1995 led to the formation of *Raisons d’Agir* (Reasons to Act) whereby one of the main aims was to

provide their analytical skills for the service of the movements opposing neoliberalism. (Cooper and Coulson, 2013).

The argument here is not that academics necessarily artificially try to initiate social movements, but simply that they involve themselves in these movements. This serves two main purposes. Firstly, it allows a vital contribution to the ideological contestation which shapes, guides and encourages political action. Secondly, it ensures that the questions the research poses are of relevance to those struggling against oppression and exploitation and to contemporary political discourse in wider society. There is a need to consistently encourage progressive consciousness and give progressive forces in society confidence to more effectively challenge injustice and inequality. This section has sought to outline some of the difficulties within “academic Marxism”. In opposition to this, the next section outlines dialectical materialism as being central to the Marxist method.

### 3.4 Dialectical materialism

Whilst ideological contestation of the conventional arguments about unpaid care being inevitable is essential, it cannot stand in isolation from demonstrations, protests, and strikes and so on to change the current situation. This, however, poses the question of what people would be demonstrating for and this feeds into the later discussion of the need to argue for practical reforms in the here and now. Similar to Gray (1998) arguing that social accounting will be ignored if it relies solely on evidence and reason, the best argument imaginable for greater support can only achieve so much without practical actions to force the government to act. Furthermore, in contrast to postmodern and postmodern influenced works cited in the literature review, here it is held that we require a certain degree of abstraction to gain purchase on the immediate topic of investigation. In this way, there is merit in, for example, attempting to generalise from individual carer experiences to guide future campaigning on the question of unpaid care. Moreover, there is the need to recognise the rich totality of social relations, specifically acknowledging the role played by an understanding of the family unit; the role of disabled people under capitalism; or the existing benefit rules which currently exist. To consider these questions in more depth, we need to look at Marx’s critique of idealism and the development of “dialectical materialism”.

Idealism starts from the premise that we have certain ideas that we then project onto the world or, to put it another way sees “consciousness as the foundation of reality” (Eagleton, 1997, p.5). However, for Marx, this was subverting matters since you come into society already with certain economic structures and with ideas already present, which in turn decisively influence your development.

The mode of production of material life conditions the social, political and intellectual life process in general. It is not the consciousness of men that determines their being, but, on the contrary, their social being that determines their consciousness. (Marx, cited in Lenin, 1981, p. 23)

However, contrary to claims that Marxist theory places too much emphasis on “the economic”, we cannot read from the productive forces and relations of society the manner in which the contradictions are played out, through, for example, ideology. Indeed it is only in looking at the interplay between the differing elements that we can understand the totality. Instead the argument is that the material base of society gives rise to a political superstructure, through which ideological battles are then played out (Lenin, 1981, p. 23) which then themselves become objectified as part of those same material conditions.

An example of the material foundations of idealism within academia can be formed as follows. Philosophy can only be sustained through the work of other people since it is only once society has achieved a surplus that some of its inhabitants can be free from productive labour (Eagleton, 1997, p. 7). In this way, academics constitute one side of the division of the mental / manual division within capitalist society. As Eagleton (1997) explains:

Now thought can begin to fantasise that it is independent of material reality, just because there is a material sense in which it actually is (p. 7).

Without slavery, for example, Aristotle could not have pursued his “mental labour”. As Callinicos (2004) explains philosophers, in general, have ignored production because “all assumed that someone else would do the work to provide them with their sordid

material goods – food, clothing, lodging – that they needed in order to pursue the truth” (Callinicos, 2004, p. 68).<sup>6</sup>

This is clearly present in contemporary theorising since authors like John Holloway (2010) speak of how we should “Stop Making Capitalism” (Holloway, 2010, p. 254). We are informed:

Our struggle is to open every moment and fill it with an activity that does not contribute to the reproduction of capital. Stop making capitalism and do something else, something sensible, something beautiful and enjoyable. Stop creating the system that is destroying us (Holloway, 2010, p. 254)

The question of how someone can get by without working is not suggested, nor is quite how, as a society we obtain what we collectively need to survive. What is quite ironic in all of this is that theory always emerges in a particular material context. To take Marxism as an example, Eagleton (1997) explains:

There could not have been any Marxism in the age of Charlemagne or Chaucer, since Marxism is more than just a bright set of ideas which anyone, at any time, might have thought up. It is rather a time –and place- bound phenomenon, which acknowledges that the very categories in which it thinks – abstract labour, the commodity, the freely mobile individual and so on – could only have emerged from a heritage of capitalism and political liberalism. Marxism as a discourse emerges when it is both possible and necessary for it to do so, as the ‘imminent critique’ of capitalism, and so as a product of the very epoch it desires to move beyond. (p. 9)

However, Marxists seek to understand not just the origins but also the “political function of ideas in society” (Eagleton, 1997, p. 13) as will hopefully be shown with the brief section on history which follows, showing how many of the other theories lead to conclusions which downplay or eliminate our role as historical agents.

It would be incorrect to see all this as a one way mechanical process. Whilst thoughts are shaped by the society in which you live, people *are* capable of independent thought and action (Callinicos, 2004). This should seem obvious since otherwise what was the

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<sup>6</sup> Of course, it is worth pointing out here that given the means exist to provide for everyone’s needs under a developed means of production (capitalism), academics, like artists etc. can contribute greatly to society as a whole without even coming close to threatening “scarce resources”.

point of Marx rallying against capitalism in the first place? Materialism, in its truest sense, should therefore not be taken as “mechanical” since this does not account for how things continue to change.

The flipside to the idea of the infinite dominance of the means of production over conception is the idea that change is inevitable because of the contradictions inherent to capitalism.

The objectivist speaks of a necessity of a given historical process; the materialist gives an exact picture of the given socio-economic formation and the antagonistic relation to which it gives rise. When demonstrating the necessity for a given series of facts, the objectivist always runs the risk of becoming an apologist for these facts: the materialist discloses the class contradictions and in so doing defines his standpoint. The objectivist speaks of ‘insurmountable historical tendencies’; the materialist speaks of the class which ‘directs’ the given economic system, giving rise to such and such forms of counteraction by other classes (Lenin, cited in Rees, 1998, p. 174).

In this way, we are informed, materialism is by its nature partisan. Therefore, in contrast to mechanical or idealist perspectives, Marxist materialism can be taken to incorporate another element of classical German philosophy, namely “dialectics”, being the theory of how change takes place.

The origins of the (originally idealist) dialectic method come from Hegel. Whereas Hegel believed that we create the world with our ideas, for Marx “ideas were simply the material world reflected in our minds” (Callinicos, 2004, p. 72). “[Dialectics] reveals the transitory character of everything and in everything” (Engels, cited in Lenin, 1981, p. 22).

Therefore in the same way that objects and social relations appear as solid or timeless we can see how appearance and reality (or phenomenon and essence to use the original terminology) can contradict one another. Our perceptions, for example, would indicate that the sun goes round the earth (Callinicos, 2004). Another example may be that the earth appears flat, or at the very least not round and, indeed, this was the initial perception and belief. Therefore, our perceptions can be misleading. Even though a stone and a feather if dropped from the same height will not hit the ground at

the same time due to air friction (Callinicos, 2004) we do not abandon theories of gravity with objects falling to earth at a speed of roughly 9.8 metres per second.

With respect to the current research what this means is that, whilst a central component of the research, we cannot rely on the “lived experience of the people” (Sikka, 2000) or of carers on its own, especially in a society where capitalist ideology directly affects the way people perceive the world around them. It would not be enough to simply carry out the interviews and summarise the results although obviously this has been carried out. We must also interrogate so far as possible the rich totality of social relations.

Here, contrary to claims we must reject meta narratives (Ball and Seal, 2005) it is important to recognise that we require some degree of abstraction in order to gain any purchase on what we are examining. Callinicos (2004) uses the example of mass to explain how this concept was used to allow us to develop the theories of inertia, free fall and gravity. Or as Ackroyd (2004) explains “without adequate conceptualisation it is impossible to make observations (never mind discriminate between significant and less significant observations)” (Ackroyd, 2004, p. 11).

However, these abstractions must be related to how things appear if it is to retain any relevance. Therefore, whilst we must seek to understand “the most basic and general features of the reality we are trying to understand” (Callinicos, 2004, p. 72), we must also relate this to what we observe. Summarised very briefly, this can be understood as looking at how things first appear to us on the basis of our own experience and senses. From this, we can then move to abstractions to explain the appearances which can then be related back to the initial topic of enquiry. In this sense we move from the “concrete reality” to the “general” and “abstract” and from this back to the “concrete” again.

What is vital here is that the Marxist method does not assume that understanding “concrete” reality is a simple process. Indeed, it is precisely because reality is a multifaceted and complex totality that we must use a level of abstraction. More than this, it is precisely this ability that distinguishes us from other animals. After passing through the stage of abstraction, we can then move back to the original superficial appearance of things to more usefully explain what is taking place.

Recognising society as part of a totality and not isolated “fragments” allows us to provide a much richer, more useful explanation of what is happening (Cooper et al,



2005). For example, to examine “carers” alone, outside of the benefit rules that exist or without developing an appreciation of how this interplays alongside the experience of disabled people; or the development of the welfare state; or the role of the family would leave us in a very difficult position. In fact, it seems difficult to even contemplate how this would be possible in practice.

Whilst Lyotard (1984) wished to wage “war on totality” and to simply revel in storytelling or “fragments” in their own right (Callinicos, 1998), this research stands in a different tradition. Instead, the aim here is to use the particular to better understand the whole (Callinicos, 1998). It is an attempt to fuse together the objective conditions (Chapter 6 on Carers, legal changes and benefit allowances etc.) and the subjective experience (Callinicos, 1998).

With respect to this research, you could also argue that it is an attempt to begin reclaiming “micro-history” from what has come to wrongly be associated with a postmodern monopoly (Callinicos, 1998). The study of individual lives, in this case carers, is thus conducted not as “an interesting story in its own right” but with a view both to understanding the whole as well as seeking to influence or change those conditions.

However, it would be wrong to assume dialectics was simply about how things related to each other or how they were “interconnected”. It is much more than this. For Hegel, nature showed that contradictions existed within things themselves and this led to change. What Marx did was to develop this theory of the natural world and apply it to society, thus becoming a theory of historical development or how change has and continues to take place. Change can thus be understood by these contradictions, or by the “unity of opposites”. As Eagleton (1997) explains under capitalist society, the exchange of wages for work done appears as free and fair. This then is another example of where appearance and reality contradict each other since it conceals exploitation but also essentially suggests a harmonious social order. As stated previously, in a society where one class owns and controls the means to produce and the other does not, there is instead an inherent contradiction. This gives rise to further contradictions within society and change will stem from these conflicts. As Callinicos (2004) points out, while many sociologists accept the existence of conflict within society, they see this as an aberration due solely to specific factors, rather than something in built in its very nature. This can take a variety of forms. For example, it is

often claimed that strikes are simply the result of a lack of effective communication. Therefore, unlike many other theories, the result is that here social change is not taken to stem from evolutionary progress (Lenin, 1981).

Having thus outlined the dialectical materialist approach, the next section will look into the role of historical analysis as part of the Marxist method.

### 3.5 Centrality of history

An important part of the social accounting provided here lies in the historical analysis with respect to the welfare state, the family and disability discrimination. This section seeks to show why this was deemed to be an important part of social accounting for carers. In showing how society has been different in the past, we allow for its potential transformation in the future, thus critiquing an eternal context free “human nature”. However, precisely because how we understand the past influences assumptions about engagement in the present some argue that this simply reduces history to a plaything of political interests. In contrast, here it is argued that without attempting to provide an explanation for previous changes in society, we seriously undermine our ability to assess the best way forward in the here and now. Here, historical change is deemed to be animated by the central contradiction between the means and relations of production.

#### 3.5.1 Uses and abuses of history

One of the most important things to appreciate about history is that our understanding of it, and thus how society changes is of enormous ideological and political significance. With respect to carers, our understanding of, for example, the development of the welfare state can give us valuable information. One, often dominant interpretation (or assumption) is that the generosity of the Labour government was the central factor. This then has important implications for assumptions about how to achieve future progressive change. In summary, by understanding the past, we provide the opportunity to better understand the present.

It is very clear from past examples that the ruling class understand this all too well. Although the more obvious examples of Hitler’s book burning and Stalin’s airbrushing

of Trotsky are relatively well known, Harman (1998) cites numerous other examples of how this has taken place. He states: "In 221 BC the Emperor of the first all-China Empire decided that books referring to any previous traditions should be burned; in Mexico and Guatemala, the Aztecs in the 15<sup>th</sup> century burned previous records to make up new traditions which would justify their rule; the Spanish then destroyed their temples and monuments to effectively show that the Aztecs never existed" (Harman, 1998)

Furthermore, appreciating why historical enquiry may be given greater relative importance under different historical circumstances gives us some clues as to its relevance. The emerging class of the bourgeoisie operating under feudalism required more than a mere series of "isolated facts" to explain the process of change in society and to show that things were not "always the same". As Rees (1998) points out

There was a very noticeable rupture in the development of the ideology of the bourgeoisie in the period between the great French Revolution of 1789 and the aftermath of the Europe wide revolutions of 1848. (Rees, 1998, p. 161)

Or to put the point another way...

There has been history, but there is no longer any (Marx, 1978, p. 115)

Therefore, it is implicitly accepted that our understanding of history is of great importance. The next section will look at the different theories about historical development and the impact these views might have on effective agency.

### 3.5.2 Theories of history

In showing how society has been different in the past, we also make an argument that it could be different in the future. It is no mistake, therefore, that the welfare state chapter and the later sections on disability discrimination and the role of the family will begin with historical analysis. This type of theorising is one important aspect of convincing people they have agency and that developments (positive or negative) are not automatic. The ideological consequences of a lack of historical theorising are manifested in an array of problematic beliefs about historical development. One notion is that an underlying "human nature" determines all and that we are thus powerless to change society since, in the end, our biological impulses will bring us back down to

earth. Whilst for Marx the only real constant was “species being” or “labour”, it can be tempting to see almost everything in our current existence as universal.

Another theory is that all we require are “hard facts”, where the notions of empiricism, positivism and objectivity give us little idea how change takes place or how these “facts” relate to one another or to the wider social world. One aspect of this has been found in Stalinist “economic determinism” where change is simply inevitable since the internal contradictions of capitalism must lead to its inevitable fall. A Marxist appreciation of history, however, recognises that although there are long term tendencies, “events” are not merely reflective of superficial appearance but can be crucial.

This mechanistic theory then serves to take away our role as active agents of history. The conclusion here is to wait for change as some kind of divine intervention that will fall upon us.

This form of Stalinist theorising arguably gave rise to the postmodern critique which essentially posits that any attempt to understand or learn the lessons from history is futile given the multiple interpretations possible. This position has serious implications.

Whilst definitions of postmodernism are often contradictory, vague or inconsistent (Callinicos, 1989), there are some key themes we can outline. This is argued to be seen in the works of the poststructuralists Deleuze, Derrida and Foucault who all:

Stressed the fragmentary, heterogeneous and plural character of reality [and] denied human thought the ability to arrive at any objective account of that reality (Callinicos, 1989, p. 2)

Despite authors like Lyotard identifying postmodernism with a rejection of “grand narratives” (Callinicos, 1989), these notions had material roots. One example of how these material changes can affect the theoretical discourses present within society is found in the work of Lyotard (1984) himself. Previously a socialist, Lyotard now felt able to claim that:

We all now know, as the 1970s come to a close, that an attempt at an alternative of that kind would end up resembling the system it was meant to replace (Lyotard, 1984, p. 66).

Partly in response to the horrors and later collapse of Stalinism but also a result of disillusionment post 1968, Lyotard had given up on the potential for a coherent socialist alternative (Callinicos, 1989). In this way, what has since become associated with Thatcherism – the idea that “there is no alternative” – began to gain ideological legitimacy. Of course, this tendency increased following the growth of the New Right under the Thatcher and Reagan era.

Therefore, the defeatism that then emerged from this period partly explains the rejection of so called “grand theories”. Any serious attempt to systematically account for what is taking place or how change occurs is seen as part of a “power game” with the consequence that all theory is then seen as a form of “authoritarianism” (Harman, 1998, p. 18). The result of this is rather useful for the ruling class since it renders more generalised tactical discussions elitist and dismissive. From this, authors such as Mouritsen et al (2002) put forward that effective agency is everywhere, thus blunting radical potential and sowing confusion and disillusionment.<sup>7</sup>

In addition, this rejection of grand theories and patterns to history prevents us from outlining clearly how the world has been radically different in the past and thus can be in the future. Thus, postmodernism treats “social domination as a permanent and ineradicable feature of human existence” (Callinicos, 1998, p. 40). The implicit conclusion seems to be that any attempt to change society will ultimately be fruitless and we should simply accept our lot. One of the most useful elements of this theory in inadvertently reinforcing the status quo is the confusion that it serves to sow.

One consequence of this rejection of broader theorising is that history is viewed as “a mere series of chaotic events or only subjective and personal judgments that we have placed on them and on the world around us” (Harman, 1998).

It seems reasonable to ask whether if ideas are just subjective representations, why put forward your argument unless you believe it to be more credible or provide a better understanding? Presumably for all the talk of authoritarian discourse, they are attempting to influence the debates in wider society. Of course, one could argue that the aim is not to convince but rather the value lies simply in the discussion. As an abstract principle, there is nothing wrong with this, particularly given the attacks on “academic freedom”. Given this critique, however, it is ironic that under socialism, with

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<sup>7</sup> This is dealt with in more detail in the section on reformism in this chapter.

the greater free time available to people more generally, thought could really be “an end in itself” (Eagleton, 1997, p. 49).

### 3.5.3 Marxist analysis of history

From a Marxist perspective, there is an explainable pattern of historical development. In sum, all history is the history of class struggle (Eagleton, 1997). By this, Marx was outlining the contradiction between the forces of production (the existing productive means available to society) and the related social relations of production whereby, under capitalism some own and control these means and others do not. From this, one class then has a material interest in maintaining this situation and these relations act as a fetter on the further development of human society. Productive advance can only be maintained whilst generating inequality, economic crisis, unemployment, created scarcity and the destruction of capital through war (Eagleton, 1997).

However, it is absolutely crucial to realise that this sharpening of contradictions animates and provides the objective context but does not cause its transformation. As Eagleton (1997) points out citing Marx, history does not *do* anything.

### 3.5.4 “Species being”

In Marx’ “Thesis on Feuerbach”, there is a deliberate attempt to undermine the idea of the underlying “human nature” often used to justify inaction. Part of this argument was that ideas about the world are somehow inherently human and timeless and not linked to the structure of society. In countering this, he looked for those elements which explain what has been constant through human existence. Whilst the need to survive and reproduce ourselves is of course a part of this, unlike other animals, we are conscious actors and able to tangibly affect our natural environment. It is through co-operative labour that we can achieve this. Marx referred to this active participation in the productive process as our “species being” (Callinicos, 2004). As Eagleton (1997) states:

We are naturally social animals, dependent upon each other for our very survival, yet this must become a political value as well as an anthropological fact (p. 17)

Another part of the argument against the possibility of social change, still present today, is that we are like animals – striving for survival in a harsh world, simply responding to our “biological programming”. However, what this ignores is our “power of reflection” (Callinicos, 2004, p. 67). We have the ability of “abstraction”, being able to step back and analyse with the power of critique and reason (Callinicos, 2004).

Unlike other animals, we produce our own means of subsistence and can seek out ways of continually improving this process (Callinicos, 2004). Put simply, we have the ability to change the world around us. In this sense, it could be argued that it is precisely our *agency* that makes us uniquely human.

If, as this section has argued, production and labour are constant throughout human existence, then we clearly require an understanding of how production is organised. The next section on economics aims to provide this.

### 3.6 Economics

This section seeks to provide an understanding of the basic economics guiding capitalist society. In so doing, we allow for placing the blame where it belongs, thus affecting our assumptions and methods of engagement. In other words, by showing that capitalism contradicts rather than meets social needs, we expose the problems for unpaid carers as more systemic than superficial. Moreover, it is held that we can only gain an adequate understanding of how carers and the people they care for are treated by grasping the basis on which capitalist society operates and its basic “laws of motion” (Marx, 1976).

It is precisely because labour is central to the process of extracting “surplus value” that all others who are not seen to be of direct use in this process are cast to one side, oppressed and ignored.<sup>8</sup> In the context of the debate around care, this is relevant because it shows that contrary to superficial appearance, money (which we apparently never have ‘enough’ of to provide for peoples basic needs) is not the source of wealth in society. This reframing of the basic premises that lie behind economic fatalism

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<sup>8</sup> Many of these arguments are examined in more detail in the chapter on the welfare state and in the sections on the political economy of disability and carers.

destroys the illusion that there is no way we could ever provide for the population's care needs.

### 3.6.1 Alienation

If “production” and labour are so central to human existence, then clearly an assessment of how this production is organised becomes vitally important (Callinicos, 2004). It is at this point that we come to the classic abstraction made between those who own and control the means of production (the ruling class) and those who do not (the working class). Since you are free only to sell your labour in order to survive, what should be part of our “species being”, or “life affirming” instead is simply a means to an end or something to be avoided at all costs. From this it is suggested that it is not socialism that is against some “human nature” but instead the current relations of production. It will not come as much of a shock to claim that most people only begin to feel a sense of freedom when they are *not* at work. What we have then is the concept of *alienation*, whereby instead of having control over the products of our labour, they appear to control us. This then coincides with an alienation from other people around us.

### 3.6.2 Marxist Political Economy

The world appears to us as a series of commodities (Marx, 1976). So begins Marx's *Capital*. From the beginning, therefore, we get a sense of how this superficial appearance will be examined. For Marx, a commodity<sup>9</sup> is defined as something that

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<sup>9</sup> Here, an important note is required. Whilst Engels in his edit of *Capital* Volume 3 puts forward the existence of “simple commodity production” which predated capitalism, Marx outlines from the start of Volume one that he is only examining the commodity in relation to the capitalist mode of production (Heinrich, 1996). Therefore, whilst it is possible that “commodities” existed prior to capitalism in a loose sense, in *Capital*, this is intimately tied up with the rationale of the extant economic system under examination and the rationale which guides it. Commodities are increasingly only useful in the sense that they have an “exchange value” which will result in the realisation of surplus. As the transition from feudalism to capitalism progresses, this becomes the driving force, as production is purely about making profit. Since under pre-capitalist production the real subsumption of labour has not taken place, the “commodity” so called, has a completely different meaning since it is used primarily for consumption. However, the exchanges which take place are also a precondition for the development of modern capitalism and the development of a universal equivalent (be it gold or the money form). As people increasingly are unable to produce their own means of subsistence, the



satisfies a want and that can be exchanged. It has a *use value* in the sense that it is useful or has some utility. It is thus able to be exchanged with other commodities, representing the exchange of one use value for another. However, from this alone we cannot understand why one commodity might be a simple swap (like one table for one towel say) and another may require twice or more of the quantity to obtain only one unit of the other (like, for example 10 printers for one computer).

*Having already established the constant throughout history, that is production or labour, Marx then used this to explain what was constant in the commodity form. All commodities are a product of labour.*

Therefore, the *exchange value*, or the relative amounts of a commodity which exchange for each other within an economy must ultimately be determined by the amount of labour time involved in its production. Again, since we require abstractions to effectively understand this process in the first instance, Marx calls this “the share of socially necessary labour time”. This represents the average skill and speed of the worker and productive techniques etc available at the time. It should be obvious at this point that we have moved on from simple commodity for commodity exchange and instead we use what is often deemed the “universal equivalent” or money. In this way, as exchange develops, the process becomes more and more abstracted from its original labour source.<sup>10</sup> Money was a necessary development for capitalism to become more fully established since it allows exchange, circulation, a means of payment and hoarding all to take place.

Unlike feudal modes of production, capitalism operates on the basis of profit, or in other words the transference from money to capital to money + (i.e. where money+ is greater than money). Marx calls this increase “surplus value”.

Since neither commodities in their own right nor price increases or decreases could create this value in their own right (it would always be a zero sum game), the value must come from the commodity of “human labour power”. When this is used, it

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commodity increasingly appears as existing in its own right, abstracted from any social processes. This is linked to what Marx outlined at the commodity fetish. The technical definition of the “commodity” therefore cannot be separated from a situation in which “generalised commodity production” takes place, whereby the aim is to provide for the market. From the perspective adopted here then, using the term commodity is fairly meaningless when talking to precapitalist systems and is perhaps why Marx refused to use the term specifically for precapitalist production (Heinrich, 1996)

<sup>10</sup> This could prove quite important in a discussion on finance capital but that is outside the scope of the current research.

constitutes real labour. Like all other commodities, its value is determined by the “socially necessary labour time” required to produce it – that is, the amounts required to reproduce the worker themselves represented in all the other required commodities. Therefore, in order for profit to be made, the worker in general must produce more than their own means of subsistence. In other words, part of the labour is expended to provide for the labourer themselves and the other goes straight to the capitalist, and in effect remains unpaid.

The capitalist, however, does not simply own a means of production and hire a labour force. Capitalism is characterised by competition, with different capitalists competing to sell their products to the same market. As a result of this, they are driven to invest not just in variable capital (i.e. labour power) but also on “constant capital” (i.e. means of production). It is here that they can compete more effectively on the grounds of improved productive techniques. Capitalists who do not do this, will, over time, not be able to maintain themselves. It is this tendency to put more and more into means of production relative to labour that explains the growth of unemployment and poverty, despite the improved productive capacity. It is also this tendency which is the source of the systemic nature of capitalist crisis. Again, this is not something that is an aberration but is central to its operation.

This distinction is important and separates this research from reformist works which suggest that more superficial changes can resolve the problems with a capitalist economy. However, this is different from arguing that articulating reforms serves no useful purpose. The next section seeks to explain this position in more detail.

### 3.7 Reformism

Given the Marxist position adopted, it may seem superficially contradictory to argue for reforms to better the conditions for unpaid carers. However, here this is held as essential for two reasons. For one thing, the research provided here is motivated by a concern for working class interests. Secondly, it is in concrete struggles for such reforms that people realise their common interests and collective agency.

Moreover, it is precisely in understanding the democratic and social limitations of capitalist society that we can locate the context for the form of social accounting provided here. We must recognise that whatever the immediate rationale,

underpinning the contestation of “accountability” is simply “a demand for the appropriate social relations” (Bryer, 2000b, p. 352). From this, we can begin to understand why social accounting can play a role in facilitating social change. By exposing the consequences of capitalism all the way from Engels’ (2009) social account of the Manchester factory workers to the present day, we allow the potential for a more radical critique. We can begin to make visible that which our rulers would wish to hide or ignore. Moreover, if revolutionaries are involved in conducting these accounts, we allow for the blame to be placed where it belongs. Coupled with this is the potential for either directly articulating suggested reforms or opening a space for others to do so, thus providing valuable weapons for the oppressed and exploited. This stems from a recognition that the key to social change lies in the concrete struggles that emerge.

However, this does not make people’s conception of where the problems arise from irrelevant. Some have asked “what is really being said by insisting that radical change is needed?” (Mouritsen et al, 2002, p. 504). Therefore, whilst seeking practical unity on certain issues with people from different political and ideological persuasions, articulating the need for the complete transformation of society is not an unimportant side issue. Social struggles for reforms will always take place to some degree but the ideological battle is one arena in which these inevitable conflicts between labour and capital are manifested and directed. Therefore, whilst struggle itself is central, attempts at social accounting must be theoretically driven (Cooper et al, 2005). Crudely put, the focus on what happens is not a substitute for asking why it happens or what we can do about it. The rest of this section seeks to provide some insights into the position on reforms adopted here by contrasting these with the ideas of Mouritsen et al (2002).

One charge often faced by Marxists is that the possibility of revolution is simply too abstract to be meaningful. For example, we are informed that:

Even if Tony Tinker, David Cooper, Hugh Willmott, Trevor Hopper, Peter Armstrong and other primarily UK based researchers in many elegant works argued for a Marxist position and demonstrated its usefulness in empirical analysis, Scandinavian researchers had problems...because it only had one possible – very generalized – type of action: to change the system radically! (Mouritsen et al, 2002, p. 499)

Similarly, we are informed that Marxism suffers from demobilising people because it can seem “difficult to take ‘the whole thing’ on” (Mouritsen et al, 2002, p. 500) and that it may be “too grandiose and therefore its prescription is problematic” (Mouritsen et al, 2002, p. 504). In this same vein, we are then told that Marxism “paid very little attention to the kind of step-wise transformation of society which has been the Scandinavian tradition” (Mouritsen et al, 2002, p. 499). The insinuation throughout is that Marxists either do not care about or ignore reforms. This is problematic. Firstly, the emphasis Marxists place on revolution is because we have a different end goal recognising this as the only means of meeting social need and fulfilling our full human potential. This is because reforms which are granted, or rather forced, from the ruling class can subsequently be withdrawn in a different social context where their direct class interests are not immediately affected by doing so. The far reaching assault on the welfare state in the UK under neoliberalism should be sufficient evidence of this.

Secondly, even where reforms are granted, the fundamental drive towards competition between states and units of capital leads to military conflict, environmental destruction and the continuance of private property thus entrenching economic and democratic inequality. Without democratic control over what is produced and for what purpose, we cannot prevent the worst outcomes human society has endured thus far. It is worth asking in the context of attacks on the long heralded Scandinavian welfare state, whether this “evolutionary path” can still be justified.

This leads on to another important point. Revolutionaries often disagree with reformists over why reforms were granted in the first place. In this example, alternative theorising of how the Scandinavian welfare state came into being, its historical origins and development are completely ignored. It would perhaps be wise to cite the observation that “to be not naïve is to master a bit more than the superficiality of things and not be fooled by their appearance...” (Mouritsen et al, 2002, p. 500).

Simply because a Scandinavian welfare state exists, it does not automatically follow that capitalism acts in the interests of the people or is on an evolutionary path towards equality. Whatever its historical origins, the point is that these questions are not even considered. “Superficial appearance” it seems is taken for granted.

However, with respect to the charge of abstract theorising, there are some legitimate concerns about engagement if authors simply state that capitalism is the problem and leave it there. It is absolutely reasonable for critical theorists to consider how to engage effectively and to challenge the faith put into the capitalist state or to capitalist institutions more generally. However, this in no way necessarily equates to forwarding our agency or our ability to collectively change this situation.

Unfortunately, this variant of Marxist inspired research, although placing the source of society's problems on to capitalism, can feed into a certain fatalism since they are seen to be asking for too much in the absence of a coherent strategy about what we *can* do. Of course, this can lead people to a feeling that the whole struggle is overwhelming. What both theories ignore, however, is the centrality of engagement in practical real life struggles, recognising that Marxism is about theory and practice. It is this engagement in concrete struggles that provides the bridge between the ideological assertion that capitalism must be overthrown and attempts to involve as many people as possible in acting to change their situation. It is precisely in struggling for reforms within society that people realise their collective strength and potential agency. Lenin (2004), for example, has spoken of how workers can "utilise reforms to develop and broaden the class struggle". Similarly, in arguing for the provision of education to child labourers, Marx stated that:

In enforcing such laws, the working class do not fortify government power. On the contrary, they transform that power, now used against them, into their own agency. They effect by a general act what they would vainly attempt by a multitude of isolated individual efforts (Marx, 1996)

One of the most unfortunate mischaracterisations of Marxism is that since it is for the revolutionary transformation of society it is simply uninterested in reforms. If this was the case it would pose serious problems. For one thing, a genuine revolutionary cannot be indifferent to the suffering of ordinary people and will always struggle for immediate gains in the here and now. Moreover, revolutions themselves do not begin with the majority of people believing they are struggling for complete transformation. In the first instance, these struggles are almost always centred around relatively moderate demands regarding democracy, accountability and equality. It is only once the ruling class show themselves unwilling or unable to grant such reforms that a more far reaching radical conclusion is drawn. At this point, often the full violent force of the

state is brought into direct vision of the mass of people. Furthermore, it is in practical, concrete struggles that people realise their common interests. There are no doubt countless examples of this from the Coors boycott forwarded by the gay community in San Francisco to the involvement of women in the 1984-1985 miners strike support groups. In both examples, people's perceptions of one another started to change. The material experience of solidarity begins (and only begins) to break down centuries of ruling class propaganda. However, in addition to building practical unity, this struggle for reforms builds the fighting capacity of the oppressed and exploited for future struggles. In this sense, it serves as a form of revolutionary training. Therefore, it is not correct to state that all Marxists are "against reforms" and reformists are "for reforms". However, there is a difference between struggling for reforms and *reformism*. The difference here lies in the desired outcome, since Marxists do not content themselves simply with scraps from the table.

Despite making a political decision to spend so much time dismissing a caricature of Marxism, Mouritsen et al (2002) do, however, have a theory of their own. They use a false polarisation between encouraging action and recognising structural constraints to discredit Marxist theorists. Speaking of Scandinavian approaches, we are informed that:

It is concerned with the possibilities of action-not the structural of [sic] discursive elements of action. It is concerned with the frailties that allow any agent somehow to intervene and make a difference- far away from the collective individual (Mouritsen et al, 2002, p. 509).

Similarly,

It opens for a space of action that can be performed without having to wait to mobilise 'the masses', where this theory therefore, 'presents actionability' (Mouritsen et al, 2002, p. 509)

The conclusion is that:

Change is possible – even from the smallest of spaces. As Latour once said during a happy moment: 'Give me a laboratory and I will raise the World" (Latour, 1983). The world can be changed from multiple places. (Mouritsen et al, 2002, p. 510)

Therefore, whilst on the one hand we are informed we cannot strive for systemic change since it is demobilising, “agency” is everywhere, unbounded by any structural constraints. What is more, again we are given a misrepresentation since Marxists are assumed to be sitting around “waiting” for a revolution. If it was this simple, why did Marx write *Capital* in the first place? Presumably, he believed it was important to act to change the world. Indeed, he explicitly stated as much. Despite the posturing, the discrediting of revolutionaries as passively watching events masks a fundamental disagreement over whether we need to challenge state power and what our final goals are. Furthermore, the rejection of tactics is partly a result of the influence of postmodern theorising. Whilst technically everyone has “agency”, some actions (like some theories) must be deemed more useful than others to more effectively facilitate social change. By avoiding this discussion and asking for ill defined “action”, we can easily collapse back into pluralism and disillusionment.

Whilst clearly the reforms articulated in Chapter 9 under recommendations would be a step forward, clearly no amount of better money or support would eliminate the causes and consequences of impairment in a capitalist society. Nor would it eliminate the oppression of women and the role of the family. What it would provide is an improvement in the existing situation in terms of a lessening of some of the worst consequences of providing unpaid care allowing the beginnings of an articulation about how another world is possible. Obviously, if capitalism is the problem, we need to put forward an alternative social structure. Moreover, if there was not the potential of meeting the many unmet caring needs (or more broadly the needs of the world’s population as a whole), there would be little point in struggling other than to get revenge on our ruling class oppressors. Indeed, the whole thesis is based on the premise that an alternative economic setup is both possible and necessary. The next section articulates the need for socialism and gives some brief insights into what this might entail.

### 3.8 Socialism

What, really, does it mean to change society radically or fundamentally?  
(Mouritsen et al, 2002, p. 504)

Having an explanation of capitalism and the dialectical process of change is all very well but in order to have a real desire to change society you must have a belief about the possibility of an alternative set up. Socialism, the collectivisation of the means of production and the elimination of classes is the resolution to this particular contradiction between capital and labour with all its associated horrors. It is precisely because we have a combined economic interest that we require the abolition of classes and state rule. In other words, ordinary people have a shared interest no matter which country you are from. What would be fundamentally altered is our relationship to the labour process. As Eagleton (1997) outlines:

...we are most human...when we produce freely, gratuitously, independent of any immediate material need. (Eagleton, 1997, p. 6)

Labour would no longer be seen as something to avoid but a means by which we express our collective identity and control our own destiny. We could see “the other...as the means to my own self-fulfilment, rather than...at best a mere co-entrepreneur...or at worst as an active obstacle to my own self-realisation” (Eagleton, 1997, p. 53). Or, to expand on this in relation to production:

My product is my existence for the other, and presupposes the other’s existence for me (Eagleton, 1997, p. 27).

Current economic structures act as a disincentive to see our common interests. It seems relatively straight forward to point out the myriad of different interests within society, for example, between the carer and the person being cared for or between either of them and a paid care worker. However, this idea of conflict amongst the oppressed or exploited classes assumes no economic alternative and takes existing economic structures as a given. This thesis puts forward the idea that there *is* an alternative and that whatever differences exist, whilst some of the exploited and oppressed may have better experiences of life *relative* to others, no-one from these groups ultimately benefits. In general we collectively do not benefit from the continuation of capitalism.

Whilst the arguments about the need to argue for reforms in the here and now remain, with respect to the research on unpaid care, the socialist alternative has important implications about what is ultimately possible. The complete socialisation of social care by those providing the care and those requiring it would completely change the



way impairment is viewed and the way those with impairments are supported. Of course, disease, impairment, frailty and illness are not unique to capitalism. However, what can change is the extent to which these impairments develop and how they impinge on your position within society. The systematic creation of poverty, and the associated living conditions, creates a situation whereby diseases are far more likely to take hold. In addition, if the scientific and technological resources available to humankind were universally applied, a great deal of impairment could be prevented (Slorach, 2011). For example, there are currently 285 million people globally with visual impairment. However, 80% of visual impairment globally can be cured or avoided (World Health Organisation, 2011). What was telling in the interviews conducted with carers was how often their own impairments were related to unsafe working practices.

This chapter sought to provide the methodological assumptions behind the research conducted. Firstly it attempted to explain why partisanship on the question of carers is justified from a Marxist standpoint and that the material experiences of academics influence their priorities and research questions. It then sought to show how Marxism sees theory and practice as intertwined and that ideas and material reality cannot be artificially separated from one another. This is important in terms of academic assumptions about engagement since otherwise the ideological contestation might be seen as all that was important. Furthermore, it outlined the importance of seeing unpaid care in the context of its historical development and the main “laws of motion” of the capitalist economy. Finally, it concluded on articulating a Marxist position on reforms and attempted to locate the need for the social accounting provided within this framework. It then went on to outline the possibilities that would be open to us within a different set of social relations. Having thus outlined the methodological approach to the research, the next section will outline the techniques used in carrying out the attempt at social accounting.

## Chapter 4: Method

### 4.1 Introduction

To understand the justification for the methods chosen it is important first to go through the main aims of the research from the outset. In providing a social accounting of unpaid care this research hopes to:

- Redirect engagement within the literature
- Explain the advantages of a Marxist framework in social accounting
- To contribute to the care debate and to encourage campaigns

One question that often arises is what led to the study of this particular issue. One of the main experiences that influenced this was working in Citizens Advice Bureau. Through attempting to help people navigate through the myriad of complex benefit forms, whether it was Disability Living Allowance or the Carers Allowance forms, it became very clear that these forms were repetitive and very difficult to answer, often not appreciating the nature of disability which can vary on a daily basis.

On deciding to research unpaid care, I then ensured that I regularly read carer magazines, signed up for BBC alerts on carers as well as reading through the already existing carer research.

Using some of this information, I then held an informal discussion with some carers about their experiences and following up from previous research noticed two things which would later prove relevant for the formal interviews conducted: 1) Almost all of the carers were women and 2) Many, if not all were not entitled to the small benefit of Carers Allowance due to “underlying entitlement”.

Partly as a result of this process, the research question could be further refined into:

- What are the consequences of unpaid care within the existing setup?
- Why does unpaid care exist in its current form?

## 4.2 Social Accounting for Unpaid Care

In seeking to address these questions, this research brought together three strands to form the social accounting provided. These included:

- An introductory chapter to give an overview of the topic and the current situation as regards unpaid carers.
- Carer Interviews
- A theoretical explanation and analysis of why care exists in its current form

Bringing these together to provide a social accounting for unpaid care relied on a number of diverse sources. These included:

- Previous social accounts provided by carer campaign groups
- The government sponsored social account in the form of the Care21 Report
- A close reading of the Care21 Report to show the difference in emphasis between this and more campaign based social accounts
- Informal meeting with carer groups and care professionals
- Attempted attendance at a Glasgow City Council consultation on “carer strategy”
- Carer Interviews
- Carer magazines
- BBC alerts on carer news
- Government website information on the “aging population”
- World Bank data on population, life expectancy and GDP growth
- Carers UK chronology of legal changes in terms of disability and care benefits and support

- An analysis of legal texts outlining the motivations behind the introduction of the first carers allowance.

Whilst the aim here is not “triangulation” in terms of using multiple sources to provide absolute objectivity, each of these should be thought of as complimentary in terms of supporting the overall line of argument. Each provides further evidence of the “what” and “why” of unpaid care.

Firstly, Chapter 6 provides an introduction to unpaid carers as a necessary background for the chapters which follow. Following this, Chapter 7 summarises the carer interviews before Chapter 8 attempts to unpick why unpaid care exists as it does. The following sections will now outline the methods used in each of the three component parts, thus constituting Chapters 6, 7 and 8 of the thesis.

### 4.3 Background

Having chosen unpaid care as an example of the kind of contemporary issue more critical social accountings could investigate, the question then became how best to introduce the discussion. Firstly, in Chapter 6, the social accounting sought to provide a sense of the general description of unpaid care in Scotland, specifically information about who carries it out (demographics); access to support (carers allowance; free personal care and the legal rights of carers) and data on the social and financial impacts of unpaid care. The data for this introductory chapter (Chapter 6) is predominantly data taken from Carers campaigning sites and the Care21 report initiated by the Scottish Executive. In a sense, summarising the results of previous “social accounts” conducted by carer organisations and the then Scottish Executive allows us to see the general picture of what it means to be a carer today and some of the problems that they face. Thus, rather than simply repeat this process, the results of these extensive “social accounts” are summarised. This helps to expose the extent of the difficulties involved in caring. It also provides vital background in deciding fruitful areas for future investigation that may be brought out in the interviews conducted.

In addition, as part of this section, a close reading of the Care21 Report was conducted in order to assess the different emphasis which may be present between social accounts carried out by governments and those carried out by carers campaigning groups. In this case, the government sponsored social account is introduced by

projections which ask people to indicate whether they think things will improve or get worse in the future. The trajectory suggested is for an ever worsening series of pressures to be placed on government actors and our role therefore becomes one of managing this decline rather than radically altering the situation. It also found that the government sponsored social account was more likely to downplay the importance of additional financial support and suggested that the development of personal payments was an unquestionably positive development.

Moreover, this section attempts to outline the formal legal position as regards carers and looks at their entitlement to support in the forms of free personal care for the person being cared for and access to carers allowance. Outlining the conditions in this way allows us to assess the formal position allowing the subsequent interviews to demonstrate what happens in practice. The next section will outline how these interviews were carried out after a brief introduction of their purpose in the context of the social accounting provided.

#### 4.4 Interviews

The next component part of the social accounting provided was concerned with the results from the carer interviews, thus constituting Chapter 7 of the thesis. This section will outline the main role of the interviews within the social accounting attempted here. As stated in the previous section, other social accounts have already satisfactorily displayed the poverty and social difficulties carers face. Although reinforcing these findings is not the primary goal, face to face interviews allows a greater amount of openness to develop about how difficult carers may be finding the situation. This was most powerfully expressed in sentiments about mental health and, at its most extreme, contemplating suicide.

Moreover, the use of interviews also allows us to see what creates this situation and what carers' attitudes are about their role. This includes perspectives on the possibility of social change and the role of government as well as how they perceive the family. In looking at the ideas and experiences of carers we can then better understand why they continue to carry out this role despite the difficulties they face.

It also allows us to see how unpaid care is subject to change through, for example, the increased use of personalisation and personal budgets. In addition, previous research did not to my knowledge focus on carer disability as an issue and the lack of access to carers allowance for the overwhelming majority of carers. In this way, it allows a contrast to be made between the formal rights of carers and how these are realised or otherwise in practice.

In giving their voices to criticism of the existing setup, we allow carers to highlight the role in their own words. This is deemed to more immediately relate to other carers who will most strongly identify with the sentiments expressed, showing how common many of these difficulties are. The use of qualitative data in this way also allows us to explore the link to the person being cared for in a way that numerical data would not permit in the same way.

Centrally, by asking about the main difficulties carers face and future improvements it also allows the development of common themes in order to guide future campaigning.

Having briefly outlined the main goals of conducting the interviews, the next section will look at why interviews were chosen over other possible methods.

#### 4.4.1 Evaluation of Alternatives

From the research questions developed, the question then arose of the most appropriate method for obtaining this information. Although there is a tendency within some of the literature for people to be “Evangelists for methods”, here it was deemed necessary to choose the most appropriate method for answering the questions at hand (Yin, 2003). As stated in Denscombe (2003),

The crucial thing for good research is that the choices are reasonable and that they are made explicit as part of any research project (p. 3).

The review of different method texts helped me to gain an understanding of the different options available.

One possibility was to use systematic observation (i.e. essentially a checklist of what takes place) of carers daily lives to either look at how they live or what they do (Denscombe, 2003). However, observation was deemed inappropriate since the setting

would be too obviously changed by the researcher's presence. Coupled with this, gaining access and satisfying ethical guidelines would be far more onerous. Of particular note in this regard is the failure of this method to look at context to provide a deeper analysis of the caring role.

That being said, participant observation (i.e. participating in the daily life of the carer) would allow this contextual, holistic perspective to develop but ethical problems mean the only feasible method would be "participant as observer" with the fully informed consent which goes hand in hand with this method. Of course, this suffers from the same problems as the above with respect to upsetting the environment in which the care takes place and the subsequent barriers this places on what people may be willing to let you see. In other words, with this method the problems associated with care may well be understated. In addition, there would presumably have been barriers to access given that people may well have been unwilling to allow someone into their home for a long period of time (Marshall and Rossman, 2006).

It should be stated at this point that this method may have allowed us to see the strain caused by, for example, dealing with benefit claims, the amount of hours spent caring and the support provided. However, it is believed here that many of these experiences are arguably condensed in interview form. In addition, the idea of following a carer around may not be well received given the constant and probably justified fear of government departments trying to push disabled people out of benefit claims. Furthermore, although this is not the central point, there are issues of practicality given the amount of time that would be required "on site" so to speak to get any kind of meaningful results.

Perhaps a more feasible possibility would have been the use of diaries. As stated in Denscombe (2003), diaries present...

- 1) Factual data
- 2) Significant incidents
- 3) Personal interpretation (p. 216)

One of the positives here would have been that they can play a therapeutic role in a similar way to interviews. However, perhaps more problematic is that the diaries will only be as good as the amount of effort put into writing them. Without the prompt of a

person sitting in front of you asking questions, it is quite possible that the amount of data required would not be collected particularly given the demanding nature of the caring role. Additionally, there is no opportunity to clarify issues raised or parts of the diary which may be unclear. Therefore, despite the possible advantages of this method, it was effectively ruled out as a means of gathering data.

#### 4.4.2 Interviews or Surveys?

Of course, it was recognised at the time that carers may not wish to participate in a survey, thus constituting issues of “cognitive access” (Saunders et al, 2003). In this regard, it has to be recognised that carers already have to fill in government benefit forms, either for themselves or for the person being cared for and that the nature of their caring role minimises the amount of free time that they may have. In this way, it may have been difficult in any event to outline the benefits to potential participants. Tied in with this is the idea that “pre-coded questions can be frustrating for respondents and, thus, deter them from answering” (Denscombe, 2003, p. 160). The potential problems with this become particularly pronounced when you consider the inadequacy of benefit forms which demand a clear quantitative response to a disability that may well vary on a daily basis. This kind of experience may well limit the number of potential participants.

In addition, given the aim of the research to explore why unpaid care exists the way it does, it is vital to appreciate the limitation of surveys in that they tend to “forfeit depth in favour of breadth” (Denscombe, 2003, p.28).

In this way it was held that the data collected from the interview process and the richness of the responses given would be more than sufficient.

More importantly, however, there is no shortage of factual data on the lives of carers with respect to how little they have to live on per week or the break down of the demographic involved in informal care. What was perhaps not so prevalent, however, was the more in depth details of what creates this situation and what carers’ attitudes were/are to the idea of social change. In other words, the poverty carers endure was already established. The point then becomes how to best expose these consequences in carers own words and how they feel about their potential to change it.



#### 4.4.3 A Defence of Interviews

Although what are the consequences could be viewed only as a “how much” question (Yin, 2003, p.5) and thus justifying the use of surveys, if this is seen as more of an exploratory question where we are trying to obtain a more in depth analysis of what is going on, interviews would be more appropriate. In this regard, the second question “Why does unpaid care exist in this way?” would seem to be less controversial, in that it specifically asks why these conditions or consequences are taking place. The questions which follow i.e. about whether carers passively tolerate this treatment and whether they want it to change but feel powerless can then begin to be addressed. This is important given the research aim of helping promote change and the “engagement” theme mentioned in the literature review.

Given that the aim is to “investigate emotions, experiences and feelings rather than more straight forward factual matters” and that these “need to be explored rather than simply reported” (Denscombe, 2003, p. 165) this would seem to justify the use of interviews. This is particularly appropriate given the focus on investigating carer perceptions about social change and agency which requires a more in depth understanding. The consequences of unpaid care in terms of the social implications require an adequate space to be provided for carers to outline their difficulties. Whilst I also sought to have an assessment of the financial implications, numbers in and of themselves were deemed less useful than a method which would allow me to see the linkages between the financial and the social and the possible reasons why these problems occurred. In short, the key advantages of this method include “the depth of analysis it permits, the flexibility which allows for interesting lines of thought to be followed and finally the unique insights gained from speaking to this small group [of carers]” (Denscombe, 2003, p. 189). Moreover, the potentially therapeutic nature of the interview process should also be recognised.

There is a more personal element to the method, and people tend to enjoy the rather rare chance to talk about their ideas at length with a person whose purpose is to listen and note the ideas without being critical. (Denscombe, 2003, p. 190)

Given that the aim of the research is to help carers, this seems to be a clear advantage of this method choice. In addition, since carers as a group and the people they care for often feel isolated and ignored, this hopefully shows that although government decision makers may ignore them, that is not necessarily the case for the entirety of the population. With this in mind, it seemed that this may well be the best way of improving participation within a method that has a comparatively high response rate (Denscombe, 2003).

Additionally, given that the issues of unpaid care often inevitably involve both financial questions and issues surrounding family or other close relationships, these topics are quite sensitive or personal. Again, this partially justifies the use of one to one face to face interviews (Denscombe, 2003).

#### Planning for Interview

With respect to the necessary preparation for the interview, it was important to remember that an interview was *not* simply a conversation...

The superficial similarity can encourage a relaxed attitude to the planning, preparation and conduct of the method that would be unlikely if it were to involve questionnaires or experiments (Denscombe, 2003, p. 164).

Part of this planning took place as an inevitable part of the ethics procedure. Once I had decided on interviews, I then needed to draw up a participant information sheet, a consent form and a schedule of interview questions to guide the interviews. These documents were then submitted for ethical approval which was subsequently granted. The interview schedule was particularly helpful as it allowed a clear set of questions to be addressed and, although not exclusive, helped me to clarify the areas I wanted to focus on.

In addition, the design of the participant information sheet allowed me to highlight the “voluntary nature of participation and the right to withdraw partially or completely from the process” (Saunders et al, 2003, p. 131) as well as highlighting the protection of individual identities (Marshall and Rossman, 2006). The latter was achieved through changing names where necessary and withholding place names entirely.

Following this, to obtain participants for the interviews, an advert was put up on the Carers Scotland website, stating the research aims and giving contact details in order to take part. From this initial contact, arrangements were then made for the interviews to take place. The only limits to this were that the interview should take place in any private location deemed suitable by the participant, including homes, offices or organisational premises such as carer centres.

After collecting together all the audio recordings (and notes in the case of Interview 7)<sup>11</sup>, transcripts were then typed up. I then read through these and picked out specific points which I believed to be interesting, of particular importance to the carer or that fitted in with the main aims of the research more generally. These were then put into different themes within the conclusion to the carer interviews in Chapter 7 to begin to generalise the main findings.

#### 4.4.4 Justification of Interview Type: A Defence of Semi Structured Interviews

Once it had been established that interviews were the most appropriate method choice in this instance, a decision then needed to be made regarding the type and detail of these interviews.

A brief summary based on the table in Saunders et al (2003, p. 248) is provided below:

	Exploratory	Descriptive	Explanatory
Structured		**	*
Semi-structured	*		**
In depth	**		

\* = less frequent

\*\* = more frequent

The final decision was to conduct 40 minute, semi-structured or “focused” interviews thus allowing a deeper understanding with more detail about carer’s lives and

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<sup>11</sup> These notes were developed from the sole telephone interview which took place.

individual stories and, for example, what lead to them carrying out their caring role. In this regard, Yin (2003, p. 164) mentions the usefulness of interviews in establishing “perceived causal inferences”. This opens the possibility of establishing more general trends which would perhaps not have been the case with a completely unstructured interview. Yin (2003) explains that the focused or semi structured interview “may still remain open ended and assume a conversational manner, but you are more likely to be following a certain set of questions” (Yin, 2003, p. 90)

Furthermore, in relation to semi structured and unstructured interviews Denscombe (2003) states:

Semi-structured and unstructured interviews have as their aim ‘discovery’ rather than ‘checking’. They lend themselves in depth investigations, particularly those which explore personal accounts of experiences and feelings. (Denscombe, 2003, p. 167)

The main objective here was to conduct interviews which allowed a focus on general themes or questions but which also allowed “the possibility of asking open questions or probing for more information on something unclear and interesting” (Saunders et al, 2003, p. 251)

On this basis then structured interviews were ruled out. It was deemed too rigid to decide in advance to simply ask the carer the exact same questions in the same order regardless of their responses. In addition, given that carers justifiably feel they are not listened to, this type of interview would have created an environment far less attuned to bringing out difficult and sometimes sensitive personal circumstances.

However, the flipside of this is not to make questions so flexible that I lost the ability to develop general themes. One important factor to consider is the relevance of the interviews to theoretical insights within the research (Bryman, 1988). In this way, it is important to see the research as part of an iterative project connected to previous research and consequently that the findings have broader significance than the interviews in their own right. In this regard, questions of agency, theorising of the welfare state and unpaid care all come into sharp focus. This is a vital consideration given the importance placed on the dialectical interaction between theory and practice which requires active engagement with real situations and concrete struggles in the here and now.

#### 4.4.5 Justification of Interview Method: A Defence of Face to Face Interviews

Within this then, there was then a need to decide on the most appropriate type of interview in terms of interviewing on a one to one basis, carrying out group interviews or conducting a focus group. In this instance, one to one interviews were deemed the most appropriate. For one thing, these are easier to control and organise (Denscombe, 2003). However, more importantly, this allowed a private environment where the carer could share their thoughts without fear of judgement or the pressures which can exist within a group environment. It was also deemed more appropriate given the aim of obtaining individual stories. Another interview type would not have allowed the same level of coherence in this respect. Additionally, this is in keeping with suggestions within the wider literature that social accounting should conduct “personal accounts” where the individual is not excluded at the expense of the collective or group (Gray, 2002).

#### 4.4.6 The decision to use a recording device

Given the sensitivity of the topic and the need for anonymity, video recording was deemed inappropriate for this setting. In addition, the very presence of such an intrusive form of recording equipment would have made the environment too hostile to obtain the kind of trust and openness required for the interviews.

In a similar way, to begin with I had concerns about using a recording device at all but in hindsight it seems this was the correct choice. With respect to this decision we are informed:

Most people ease up after an initial period of hesitancy and, when used sensitively, the audio tape does not pose too much of a disturbance to most interview situations (Denscombe, 2003, p. 176).

Indeed, this is in keeping with my own experience. Although some participants may have looked slightly wary to begin with, after about 10 seconds of speaking, it seemed to become pretty much irrelevant. It is no doubt vital to appreciate that the “visual appearance of the equipment serves to remind informants of the fact that they are

being recorded” (Denscombe, 2003, p. 177). However, it certainly helps when the device is very small and completely silent thus making it far more possible for the interviewee to forget about its presence. Crucially, the recording of the interviews allowed a verbatim record to be transcribed and sent out to each participant in order to ensure that they had said what they meant to say and thus being a partial check on the validity of the data. In this way we can guard against the possible limitation outlined in Yin (2003) of “poor or inaccurate articulation” (p. 92).

One exception to this was the one telephone interview which was conducted due to the prohibitive distances involved in conducting a face to face interview. In this case, field notes were taken. As pointed out by Denscombe (2003), the absence of audio recording “means that what was actually said will always remain a matter of recollection and interpretation” (Denscombe, 2003, p. 175). However, field notes provide “some permanent record of his or her interpretation of what was said, and can refer back to this at various later stages to refresh the memory.” (Denscombe, 2003, p. 175). In the circumstances, this was deemed the best available alternative.

#### [4.4.7 Addressing Some Practicalities - On Access to Participants](#)

Since carer organisations were involved, one factor to consider was the protectiveness of the “gatekeepers” to the carer group (Denscombe, 2003; Marshall and Rossman, 2006). Since the research aim is designed to better their conditions, it is believed that explicitly outlining this motivation greatly eased any such difficulties. In addition, my enthusiasm also provided a further advantage in this regard. As pointed out in Marshall and Rossman (2006) “the energy that comes from a high level of personal interest (called bias in traditional research) is infectious and quite useful for gaining access” (p. 74)

In addition, the decision of Carers Scotland to place my research advertisement on their website effectively meant a kind of quasi sponsorship or at least a vouching for the validity or importance of the research project and helped to convince gatekeepers of the credibility of the research process.

#### [4.4.8 The research sample](#)

One potential sampling issue is that the research was only charged with unpaid carers in Scotland. The main reasons for this are that although it is undoubtedly the case that there would be many similarities across the UK, there are specific differences with respect to free personal care in Scotland as opposed to England. In addition, there were also obvious practical advantages in limiting the geographical scope of the research being carried out.

Another issue which arose at a number of research colloquium was the decision to exclude unpaid care carried out by those under 18. In part, this decision revolved around the access problems and the difficulty that may have been faced with respect to ethical clearance for the research. In addition, there are specific issues regarding access to this group since it is often seen as a hidden or invisible group and they would perhaps be less likely to come forward.

As you will see from the brief descriptions at the start of each interview, there was less focus placed on the demographics of the carers themselves and instead placed emphasis on the following:

- 1) The relationship to the person being cared for (e.g. son, mother, friend etc)
- 2) The length of time they have been a carer and
- 3) The type of disability of the person they care for.

The reasoning behind this was to appreciate the link between the carer and that of the disabled person who is being cared for. Hopefully, this research will make it clear that the fate of one is intimately connected to the other. In addition, it is impossible to effectively understand the caring role without also understanding the role disabled people play in society and how they, in turn, are discriminated against.

To obtain participants in the research, an advert was put up on the Carers Scotland website, stating the research aims and giving contact details in order to take part. Therefore, the research could be construed as an example of “random” sampling in theory since the advertisement was publicly available. However, in practice this is perhaps closer to the “naturally occurring clusters” (Denscombe, 2003, p. 14) since it seems that the various carer centres informed participants, who then put themselves forward. With respect to the three interviews that were carried out in one carers

centre, this was an example of “purposive” (Denscombe, 2003, p. 15) sampling as here the carer groups sought out people based on particular characteristics.

The details of the sample are displayed in the table below.

Interview participant number	Location type	Interview type	Part of carer group?	Sex
1	Participants home	Face to face	Y	M
2	Carer centre	Face to face	Y	F
3	Carer centre	Face to face	Y	F
4	Carer centre*	Face to face	Y	F
5	Carer centre*	Face to face	Y	F
6	Carer centre*	Face to face	Y	F
7	N/A	Phone interview	N	F

\*All three of these interviews were conducted in the same place, with the staff in the centre specifically choosing people they deemed would reflect the diversity of the caring role.

All in all, the 7 interviews were conducted across 5 different geographical locations across Scotland. Although the planned interview length was 40 minutes, the length varied with the longest interview taking around one hour and 30 minutes and the shortest taking around 20 minutes. There were definite advantages to allowing this to take place. With respect to the first interview, it was believed that there was a need to provide a space for the carer to talk about the issues that affected them in their own words. However, it may also be worth considering that this was the only interview that took place in the participant’s home which may have had a bearing on the interview length. If more in depth interviews were to be conducted in the future, it may well be



that this is the most suitable location to carry them out as the carer may feel more at ease to discuss issues openly.

The flipside of this is where the interview does not reach 40 minutes when the scheduled questions have been asked and suitable follow ups raised. It seems quite likely that the carer involved, although quite aware of the hardship involved, thought her role so natural, so to speak, that the idea of talking about it with someone external may not seem to be particularly necessary. This would seem to be supported by the content of the interview itself (Interview 6) which places a lot of emphasis on the inevitability of her caring role. In addition, although there was a great deal of interesting insights, the phone interview again was slightly shorter possibly as a result of the lack of visual cues for follow up questions as well as the lack of personal contact which would allow the carer to express themselves with a less threatening and impersonal interview.

Another question with respect to sampling lies in who was likely to respond to the advert in the first place. Given the nature of the caring role, it is quite possible that those most negatively affected, most isolated or suffering from the greatest mental and physical strain are the least likely to be able to participate. This in no way undermines the seriousness of the consequences of care for those who were interviewed but instead, if true, would be a damning indictment on the reality of unpaid care today. In other words if this sample bias exists it means, if anything, that the results were understating the extent of the problems.

#### 4.4.9 Timing of interviews

The interviews were conducted in 2007. Since these interviews thus preceded the onset of the economic crisis, it suggests that, if anything, the problems carers face may be understated. Indeed, since then, there have been a number of changes which will have made the material circumstances far worse. For example, the government has launched an attack on claimants of Incapacity Benefit. Given that carer disability was so prevalent, this may well impact many of them directly. Moreover, the economic situation in terms of food prices and the cost of gas and electricity have increased at a far greater rate than the rise in carers allowance since the interviews were carried out. Although universal credit is set to be rolled out at a UK wide level in October 2013, there are a number of uncertainties about exactly how this will affect carers. It will also

be the case that the personalisation drive will have become more entrenched by now and so the discussion on this question closer to its introduction may prove particularly poignant.

#### 4.5 The why of unpaid care

The provision of a detailed explanation of why unpaid care exists as it does (provided in Chapter 8) allows the possibility for reconceptualising what constitutes social accounting since the depth of analysis moves us away from mere description. From the Marxist perspective adopted here, there is a need to continually interrogate existing social relations and so conducting the carer interviews was an important part of the social accounting. In addition, we also needed to uncover the detail of their experience and how they perceive their role.

However, the research sought to go beyond simply describing how bad the current situation is. In this vein, this research attempted to refocus social accounting by suggesting that merely describing what is happening can limit beliefs about agency to change the situation. Therefore, an attempt was made to consider the wider issues surrounding the care relationship. To start with, this section placed the role of carers in the context of disability discrimination since without unmet need there would be no need for unpaid care.

It thus asks why there is unmet need in the first place. In doing this, an analysis of government websites was conducted in order to infer the logics driving policy. In doing this, it was discovered that “facts” about the aging population were positively misleading and so were arguably being used more as a political tool than a distanced observation. Here, figures from the World Bank on population, life expectancy and GDP growth were used to show how other data provided a context which discredits the government abuse of the aging population argument. Clearly we cannot understand unmet need simply as a function of the number of disabled people since that does not help explain developments in support and assistance over time and why this might have changed.

From this understanding, an alternative explanation is attempted. Firstly, it places the poor treatment of disability in its historical context and shows that distrust of those outside the labour market and assumptions about the lower productivity of disabled people are mediated by what is deemed politically acceptable at a given point. This analysis, in turn, allows us to better understand the lack of support for carers.

To this end, a political economy of unpaid care is then provided. Firstly, this looks at changes in welfare legislation as it regards to unpaid carers. This chronology compiled from information on the Carers UK website is used to show the areas of continuity and discontinuity in carer legislation and support. The lack of financial support is highlighted as one item which has not been subject to change for some time, despite the rhetoric from government policy makers.

Furthermore, from an analysis of legal texts providing advice to new government acts written at the time of the introduction of the first carer allowance, we attempt to unpick the reality behind government motivations at the time. In this case, it is shown that paying carers was seen to have a minimal financial impact since most would not receive it as they already obtained other “supplementary benefit”.

In trying to understand the role of care within the profit motive present under capitalism, we look to Marx’ (1976) writings in Capital Volume 1. Here, this combines the general insights provided in Chapter 3 with direct and extensive quotations from Capital about the commodity which are used to relate to the particular situation as it relates to carers. This is then combined with a summary of the different factors and assumptions which could be involved in attempts at management accounting for unpaid care from a local authority perspective.

It concludes that unpaid care saves the government money if we assume that the care would otherwise be provided. In addition, it minimises the potential crisis of legitimacy if these needs went entirely unmet. Given that unpaid carers are seen to be part of the informal economy, they do not have economic power in their role as unpaid carers but do have a great deal of political clout given the mismatch between people’s expectations of how disabled people should be treated and the reality.

In addition, an analysis of the persistence of the family is provided in order to give a wider context to many comments in the carer interviews around the idea of “familial duty”.

In addition, following on from the discussion in the carer interviews about the likely merits or otherwise of personalisation, a further section discusses the problems with this project but why people might still see it as a potential advantage in the absence of more adequate public service provision.

This chapter has sought to outline the main reasons for the methods chosen and to examine their suitability relative to other methods. It has also sought to outline some of the changes which were made to the research design as well as looking at some of the difficulties involved with the research sample obtained. The next chapter will provide a detailed theorisation of the welfare state. This seeks to contribute to debates within the literature surrounding the role of the state more generally and as an important backdrop to the attempt at social accounting for unpaid care which follows.

## **Chapter 5: Theorising the Welfare State**

### ***5.1 Introduction***

This chapter hopes to provide a detailed example of how change has taken place in the past, specifically with regard to the development of the welfare state. This chapter draws heavily on the work of Gough (1979). From a review of the literature on the welfare state, Gough (1979) seemed to best fit the methodological approach explained in chapter 3. The definition the author provides is clear and workable. Although other works from a Marxist perspective are cited (Ferguson et al, 2002), the overemphasis on the positive aspects of welfare for capital (e.g. having a healthy and educated workforce) does not help explain why it may later be removed in a different context. Thus, the idea of the welfare state as a contradictory phenomenon subject to tensions and strains is more consistent with the dialectical approach explained earlier. From the perspective taken here, these tensions are best expressed in the work of Gough (1979).

This chapter serves three purposes. Firstly, it is a contribution to the debate about the theories underpinning engagement. In this case, the focus on theorising the capitalist state fits well with some of the debates about the role of the capitalist state contained in the literature review and the role of public services. Specifically, it shows that the development of the welfare state (for disabled people, carers, or anyone else) was not rooted in an evolutionary development under capitalism, or as a result of altruism from government actors. In this way, it is a partial refutation of the idealistic assumptions about the state outlined in the literature review earlier.

Secondly, the lessons which can be drawn from this section provide valuable information for the form of social accounting provided here. Specifically, it allows an exposition of the thesis' position on reforms and helps to explain why they are not simply rejected as perhaps "inducing political quietism" (although of course, they can play this role). Here, it is suggested that although reforms are temporary concessions, they can be won under certain historical conditions and it is worth fighting to defend these gains against subsequent attack.

Finally, the development of the welfare state also provides a backdrop to the development of health care in the UK. The mismatch between the dominant ideology of the welfare state and the reality leads to anger and resentment. Specifically, it provides a context for the future politicisation of the caring role which would have been difficult to envisage without this development.

In the context of the most significant and far reaching attacks on the welfare state since the end of the Second World War, this chapter seeks to take on the idea that the state acts or ever has acted primarily in the interests of the people. To achieve this, this section will show the origins of the welfare state as placed between class struggle on the one hand and the longer term political calculations of the ruling class on the other.

In the context of these attacks, the temporary nature of previous gains is clear for all to see. However, despite the contradictory nature of the welfare state we need to strive to do all we can to defend the limited provisions that did exist to meet “human need” realising that in arguing for a defence and expansion of these elements of the welfare state we are making an argument about the type of world we wish to live in. This, in turn gives confidence to all those with an interest in social justice and minimises the ability of the ruling class to restructure in the long term interests of capital. Otherwise, we will simply be waiting for another crisis and another wave of attacks, with the wars and division more generally that accompany this.

## ***5.2 What is the Welfare State?***

Before looking at the precise origins and role of the welfare state, it is important to first clarify what we mean by the term in the first place. The welfare state can primarily be located as a theoretical concept post World War 2. Making a clear distinction from concessions more generally, Mishra (1990) argues:

‘Social policy’... is a generic concept whereas the ‘welfare state’ has a fairly specific historical (post-war) and policy (institutional) connotation which cannot be ignored (Mishra, 1990, p. 123).

This idea of both the time specific nature of the change and the sheer scale of the changes is reflected in Deacon (2002) who states that the welfare state reforms were

“developed during the first half of the twentieth century, but they were transformed in scope and quality during and immediately after the Second World War” (p. 4). The theoretical idea of the welfare state as separate and distinct from previous understandings of the capitalist state could only be put forward with any credibility because something fundamental had changed in terms of how capitalism operated in the more advanced economies. In this way, we can begin to see how the welfare state differs from that which went before.

In trying to establish a clearer definition of the welfare state, a number of authors have cited the idea of an established minimum. Bryson (1992), for example believes a welfare state exists “when a nation has at least a minimum level of institutional provisions for meeting the basic economic and social requirements of its citizens” (p. 36). Similarly, Mishra (1990) cites a “decent minimum” but goes further in outlining full employment, universality of access to health, education and housing as well as access to social assistance through welfare benefits. Again, the same basic idea is repeated in Deacon (2002).

In British usage the phrase ‘a welfare state’ customarily refers to a society in which the government accepts responsibility for ensuring that all its citizens receive a minimum income, and have access to the highest possible provision in the fields of health care, housing, education and personal social services. (p.4)

As can be seen, a related concept here, whether implied or explicit, is the acceptance that the government has a role to play in social provision and should accept responsibility for its citizen’s welfare. However, the focus on full employment in some definitions runs up against immediate problems when we consider that this has not been a goal of state policy for more than 30 years. However, the welfare state as a concept remains, which shows the problems with the time bounded definition of the welfare state itself. Another problem lies in the rather obvious point that different ‘welfare states’ exist in different countries, as reflected in the ‘ideal type’ model eschewed by a number of authors (Mishra, 1990; Bryson, 1992; Furniss and Tilton, 1977)

Furniss and Tilton (1977) distinguish between three different “ideal types” of welfare state including the “corporate orientated positive state” with “intervention aimed primarily at insuring economic stability and thus the self interest of existing property

holders [and where] this model is more likely to avoid anything that does not fit with 'economic efficiency'; will encourage a greater collaboration between companies and governments; is more likely to include targeted schemes like social insurance to protect the working population and will orientate itself more around ideas of 'social control'" (Furniss and Tilton, 1977, p. 2). We then have the "social security state with its assurance of a minimum standard of civilised life" (p. x) which also strives for full employment and basic housing provision. Finally, we have "the radically democratic and egalitarian social welfare state" (p. x) which is "directed towards greater social and economic equality and toward a collective role in framing public policy" (p. 2). This model is more likely to involve government union co-operation with a greater focus on equality. Central to this is the idea of universality and a focus on public services which are available to all.

Speaking of the social welfare state, they contend to "show how its tools of budgetary planning, active labor [sic] market policy and solidaristic wage policy<sup>12</sup> can improve the functioning of a capitalist economy" (p. xi)

According to these ideal types, they state that "Britain...illustrate[s] the accomplishments and limitations of the social security state, Sweden the possibility of a social welfare state, and the United States the moral inadequacy of the positive state" (p. xi). Similarly, for Bryson (1992), the USA and Japan represent a 'weak form' or 'residual' welfare state, whereas the Scandinavian model represents a "well developed" or "institutional" welfare state. Useful though these are, they do not get us any closer to a more generalised definition of the 'welfare state' and it may well be that the concept itself is problematic. As explained by Gough (1979)...

...the very term 'the welfare state' reveals the ideological nature of most writing about it. Put another way, the object of our study is defined in terms of a theoretical tradition which we reject (p. 3)

What results are the separate institutions of the modern state and their apparent autonomy from the relations of exploitation. It is this appearance which permits most students of the welfare state to counterpose the rights of citizens or the

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<sup>12</sup> Defined by Furniss and Tilton (1977) as attempts to increase the shares going to labour and narrowing the differences between all economic groups.



needs of people, as mediated by the state, to the requirements of the market. This appearance is not entirely false, but it is only a partial truth. (Gough, 1979, p. 40)

In other words, the 'welfare state' implies a divergence between the underlying rationale behind the capitalist state and the operations of the 'free market' rather than a vehicle to reinforce it. As a result of this some theorists have went as far as to deem the welfare state as a "decommodified space" where the rules of the market no longer apply. Works such as those of Esping Andersen (1990) emphasise these ideas with the correspondent belief that the development of the welfare state is itself the desirable end goal.

Naturally, these analyses tend towards a particular conclusion. Thus, the idea of a "post industrial" society or a "mixed economy" (Burrows and Loader, 1994) as having replaced capitalism start to gain currency with authors like Crosland (1956) feeling able to cite the end of capitalist dominance.

However, as Ferguson et al (2002) point out, all this ignores how these "decommodified spaces" are funded i.e. through taxation of a workforce paid less than their labour is worth. In addition, it also fails to look to the increasing marketisation of the public sector whether in health or education where league tables attempt to subject public bodies to the same market logic as those workers in the private sector. Yet another fairly damning example lies in the NHS reliance on private drugs companies which clearly calls into question how autonomous and market free the NHS ever was.

Instead, Gough (1979) sees the welfare state as a specific product of advanced capitalism which in itself causes problems and contradictions as states will ultimately struggle to maintain this.

With this in mind, this chapter will define the welfare state as Gough (1979) does in terms of:

- i) state provision and
- ii) state regulation<sup>13</sup>

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<sup>13</sup> Thus, the current attacks on health and safety from the Conservative government can come under attacks on the welfare state.

For the purposes of this research is it predominantly the first that will be emphasised in this chapter. Thus, we will largely deal with the welfare state in terms of “state provision of social services” identified in Gough (1979) as being “social security, health, social welfare, education and training, and housing.” (p. 3)<sup>14</sup>

Perhaps a more useful definition thus comes from Gough (1979) in detailing “the use of state power to modify the reproduction of labour power and to maintain the non working population in capitalist societies” (p. 44)

In general then, following this central definition, we can surmise the following two factors as being central to an understanding of the welfare state. Firstly, the expansion of basic provision whether by the state directly or generalised regulation placed onto companies. Secondly, as a theoretical construct which attempts to explain the post war restructuring of much of the capitalist economy. Having hopefully clarified the albeit problematic term, we can now move towards outlining the important role of the welfare state in developed capitalist economies.

### ***5.3 What role does the Welfare State play?***

The welfare state is often seen as separate from free market capitalism and an expression of the underlying human belief in altruistic virtues.

As stated by Ferguson et al (2002):

The ideological claims of welfare clearly suggest that it is a separate and distinct area of social life, geared to combating the worst manifestations of poverty and inequality, and structured by a general society wide commitment to some shared humanitarian impulse. (p. 27)

This view, for example can be found in the works of a number of theorists in the field including those in what has been termed the “quasi-Titmuss paradigm”. As Deacon (2002) outlines...

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<sup>14</sup> As Gough (1979) notes this also includes prison or probation services which is clearly not a progressive advance but helps to serve the social control function of the welfare state.

They all assume that a central goal of welfare is to reduce inequalities...[This] perspective...starts from the premise that people are often motivated by a regard for the concerns and needs of others (p. 13).

The problems with such assumptions stem from the focus Titmuss himself placed in explaining welfare policies. As stated by Deacon (2002),

What interested and animated him above all else were the moral choices that underlay policy decisions. All that research and enquiry could do was to identify options: the real issue was the values that shaped the objectives of policy (p. 16)

This is also evident in Furniss and Tilton (1977) who speak of examining the “vision inspiring the thrust of welfare policy” (p. 15). This fundamentally idealist position on the reasons why the welfare state exists prevent a deeper understanding on the reality of the economic and social processes which underpin capitalist production and reproduction. A sudden burst of altruism (presumably from the governments across Europe who made policy decisions) hardly helps us understand why the welfare state emerged just following from the most deadly and harmful total war the world has ever seen. Of course, the fact that welfare states exist in different ways and to different degrees across different parts of the world is testimony to the fact that the welfare state is not merely a reflection of pure economics but is mediated by a far larger range of factors.

There are two common misconceptions about the role of the welfare state. One is to see it as representing “a harmony of interests in society” (Gough, 1979, p. 65). The other is to see it as always unproblematically working in the “interests of capital”.

Simply describing the welfare state as working for capitalist interests comes up against immediate problems since the needs of the individual capitalist come into conflict with the system as a whole. The Ten Hours Act, for example, was viciously opposed by the capitalist class. As Marx explains:

Capital takes no account of the health and length of life of the worker, unless society forces it to do so...under free competition, the immanent laws of capitalist production confront the individual capitalist as a coercive force external to him (Gough, 1979, p. 55).

Clearly, this contradicts the idea that capital homogeneously approved the measures.

Similarly, on the flipside of this, the repeated attempts to slash the welfare state in the midst of economic crisis from the 1930s to the 1970s all the way to the present crisis show the limits of the pluralist illusion so often cited but so rarely justified. To reinforce the problems with the pluralist assumptions which underpin much work, it is helpful to look at the industrial revolution and working conditions at the turn of the 19<sup>th</sup> century. Gough (1979) states:

Hours of work increased to unheard of levels, child labour under inhuman conditions spread, industrial health and safety measures, let alone basic amenities were non-existent; the relentless and intense nature of the labour too was quite unprecedented. (p. 34)

This realisation was followed by...

...a series of attempts by the state to control the hours and conditions of work in the interest, amongst others, of ensuring that the workforce was not literally worked to death. Britain was the first to experience the development of the factory and the first to introduce factory legislation, in a series of acts from 1833 to 1853. (Gough, 1979, p. 34)

Thus, rather than seeing this as representative of some compassionate capitalism, we need to see this in the context of a more long sighted perspective of capitalist accumulation. Furthermore, to simply discipline labour by resorting to naked class rule is undesirable for the simple reason that it is extremely risky. Indeed, "political risk" is recognised as a factor in investment decisions in first year finance texts. Coupled with this is the realisation that as capitalism develops, specific work requires a healthy and educated workforce.

As Ferguson et al (2002) explain...

Of course, it is not the case that without any of these systems or provisions capitalism would necessarily collapse – indeed there are sectors of the world economy where there is little in the way of health or educational provision, for example. But without these needs being met the system operates less efficiently and given the competitive nature of capitalism it results in units of capital (and indeed national economies) falling behind their international competitors, with the drive for capital accumulation being left to rest on the crudest forms of

exploitation – via such measures as lengthening the working day, pitiful wages, intense regulation and policing of workers, all of which can be effective in the short-term but which increase political instability and discontent in the long term. (p. 30)

Therefore, we can also begin to see how the welfare state more generally helps to sell capitalism as an economic system that acts in your interests. However, even the granting of some level of basic provision for competitive reasons can cause the state that grants it problems further down the line.

The difficulty, however, is that once a demand on the state to provide some social service or meet some social need is granted and becomes institutionalised, it becomes viewed as a right. There is a certain logic to legitimation which means that the political apparatus gets progressively diminishing returns in added legitimation for a given programme over time. Once a programme becomes seen as a right, the continuation of the programme adds little to the legitimacy of the state whereas a cutback in the programme would constitute a source of delegitimation. There is thus, not only a tendency for programmes once established to continue, but a constant pressure on programmes to expand, regardless of the requirements of the accumulation process. (Wright, 1979, p. 157)

Arguably, this largely explains the maintenance of the welfare state after the economic crisis in the early 1970s. Therein lies the problem with the analysis that states you can simply buy off dissent. If you use economic concessions to waylay more radical demands, this simply builds up problems further down the line. The obvious point is that it is far harder to remove a benefit than it is to introduce it in a time of crisis. Thus, the long term interests of capital are not satisfied unproblematically.

Given the importance of welfare policies in securing popular consent for existing regimes and in maintaining social stability, welfare reforms have proved remarkably resilient even in face of governments proclaiming strict monetarist principles. Thus, in Britain, despite the often stridently anti-welfare tone of the Thatcher years, the proportion of GDP spent on welfare has remained more or less constant for the past twenty years. (Burrows and Loader, 1994, p. xi)

Whilst it is essential to recognise those parts of the welfare state we would wish to defend and expand, we must see its existence as fulfilling dual roles.

As outlined by Gough (1979), the welfare state...

...simultaneously embodies tendencies to enhance social welfare, to develop the powers of individuals, to exert social control over the blind play of market forces; and tendencies to repress and control people, to adapt them to the requirements of the capitalist economy (p. 12).

Restricting access to benefits for workers on strike is one of the more glaring examples of the attempts to control the working class through threat of sanction (Jones and Novak, 1985)

In this way, we begin to see through the ideological façade of a “basic minimum” which people have as a matter of right, not least because of the increasing numbers of homeless but also since those who strike to better or even simply defend their living conditions are prevented from accessing this “universal right”. Hiding behind ‘neutrality’ the UK government during the miners strike simply argued that you have a choice whether or not to go to work. From this example we can begin to see how the benefits system is also about regulating our behaviour towards capitalist norms.

It has always been essential, for example, to maintain an incentive to work and to reinforce the discipline of the factory over the workforce when operating unemployment schemes. For this reason, in all advanced capitalist countries, a worker can be disqualified from receiving unemployment benefit if he/she has left a previous job without ‘good’ cause’, or was sacked for ‘misconduct’, or refuses to accept an alternative job offer, or is involved in a trade dispute. Ultimately, it is adapted to the needs of a capitalist organisation of industry. (Gough, 1979, p. 33)

The ideological and material overhang from previous benefit legislation has undoubtedly contributed to the current (non)distribution of domestic roles. This includes, for example, the complete lack of paternity pay which was 2 weeks until very recently (UK Government, 2012a) implying women are the natural caregivers for children; a married woman being unable to claim Income Support if she was unemployed (Ferguson et al, 2002) and the differences in state pension age which

make it more likely women will take on caring roles for disabled relatives earlier than men.

In addition, since women continue to carry out the majority of domestic labour, any subsequent removal of access to welfare e.g. care provision and childcare under neoliberal reforms means women are disproportionately affected. As a result, although not always explicitly stated in legislation today, the maintenance of the family reinforces women's oppression (Vogel, 2000; German, 2007)

As touched on previously, another vital role of the welfare state is to allow individual states to compete more effectively with one another. For example, as technology progresses, computer skills become more sought after. In tandem with this, the globalising tendency within capitalist development means that those who can speak a number of languages also find themselves more widely sought after. In this context, healthy, educated workers can give a particular state a certain competitive edge.

There are, however, other reasons for the existence of a welfare state.

Many state expenditures have the effect of reducing the reproduction costs of labour power by socializing many expenses that would otherwise have to be paid for by individual capitalists (medical care, training and education, social security, etc.). Furthermore, a great deal of state spending on research and development, transportation infrastructures, communications, etc. have had the effect of increasing the level of productivity of capital as a whole and thus contributing to accumulation. (Wright, 1979, p. 156)

Thus, for example, it is explicitly recognised that Japan had previously seen the UK welfare state as fulfilling this role and thus it was cheaper for them and other states or corporations to invest across international boundaries through FDI guaranteed as they are to receive a relatively healthy and educated workforce in a (hopefully for investment purposes) calm political environment. Thus it is more likely than other states that do not have this infrastructure to attract investment. The sighting of "triadisation" between developed economies as opposed to "globalisation" would seem to be testament to this fact.

Two quotations from Furniss and Tilton (1977) go a long way to show the confusion over the precise role of the welfare state and the extent to which it is possible to be consistently provided under capitalism.

The values that form the basis and constitute the appeal of the social welfare state are equality, freedom, democracy, solidarity, security and economic efficiency. (Furniss and Tilton, 1977, p. 28)

The provision of social and economic security is closely linked to the functioning of the economy. Without a high level of material production, the surplus necessary for the operation of social insurance programs and public services will not be available. Accordingly, the social welfare state places a high premium upon economic efficiency, not as an end in itself, but as a means to increase human welfare (Furniss and Tilton, 1977, p. 37)

Thus, despite these authors formal belief in the provisions of the welfare state, they ultimately adopt an essentially free market position of trickle down economics. If the economy grows, we can all share in the spoils. Of course, it is absolutely correct that capitalism only granted (or continued to grant) these concessions during the long post war, arms driven, boom leading to the now eternal phrase "You've never had it so good". However, what these authors do not say is how inconsistently applied this logic will actually be in practice. It is precisely because welfare is not forever in capitals competitive interests that it is consistently attacked. In other words, "economic efficiency" is no guarantee of a welfare state but more importantly, we must reject a logic that says we should potentially allow ourselves to be exploited more or risk more severe military conflict in order for a sufficient surplus to be thrown back at us as welfare provisions. To put it another way, they take with the one hand and give back less with the other.

Indeed, Gough (1979) highlights these contradictions.

The very scale of state expenditure on the social services has become a fetter on the process of capital accumulation and economic growth itself. If capitalism more and more engenders a welfare state, it is also proving more and more difficult capitalism to cope with the problems of financing the requisite



expenditure. This was reflected in attempts to reduce welfare expenditure in many countries in the mid-1970s amidst a growing world economic crisis. But again both aspects of this process must be simultaneously comprehended. Advanced capitalist countries both require but cannot afford a growing level of state intervention in the welfare fields. The process of capital accumulation generates new barriers to that very process: in a nutshell, the process is a contradictory one. (p. 14)

It is precisely the welfare state and its contradictory nature which helps to explain the confusion over debates on whether it is an expression of the longer term interests of capital or an unremittingly positive product of working class struggle. Either position would be a serious mistake. There is fortunately an alternative.

As Gough (1979) explains,

...it is the threat of a powerful working class movement which galvanises the ruling class to think more cohesively and strategically, and to restructure the state apparatus to this end. (p. 65)

It is easy to underplay the extent to which the ruling classes (and states) responses are haphazard and contradictory. The danger is to equate the “ruling class” with some kind of omnipotence, ever putting forward the “interests of capital” even within what is so clearly a contradictory totality. Additionally, to fetishise the welfare state is to allow people to hold it up as the ultimate standard and in so doing understate the horrors of the system we currently live under. A product of the inevitable unevenness of capitalist development means that most of the world’s inhabitants do not even have access to these basic provisions.

Whilst it is important to go through a broad outline of the role of the welfare state, it is important to recognise its limitations. As highlighted by Gough (1979):

The fact that some function is required for the accumulation or reproduction of capital (like the reproduction of labour power) tells us nothing about whether or not the state meets those requirements or the manner in which it responds to them. (p. 50)

Furthermore,

...the functions of social policies must always be distinguished from their origins. Analysing the former can, strictly speaking, tell us nothing about why a particular policy was enacted...(Gough, 1979, p. 54)

It is with this in mind, that we now turn to the next section and the precise origins of the British welfare state.

#### ***5.4 Why does the Welfare State exist?***

One important feature of the welfare states origins lies in the need for effective military competition between states. As a result of the Boer War (1899-1902), medical assessments were carried out. The results showed that around half of those volunteering were deemed unfit (Timmins, 2001) with figures of over one quarter in York, Leeds and Sheffield and a staggering 3/5 in Manchester. This, in large part, contributed directly to the later provision in 1906 of school meals by the Liberal Government.

The need for fit soldiers showed up the dire situation of the populations living conditions and shattered any illusions that your own poverty was in any way unique. This posed real questions for the ruling class as it highlighted both a military weakness, but also, in the very publicising of these findings, a weakening of the ideology of inevitable 'social progress' under capitalism.

It is this that has led to the not entirely unjustified claim that "our concern for communal fitness has followed closely upon the course of our military fortunes" (Titmuss, 1963, p. 81)

In a similar way, Timmins (2001) points out that only one third of conscripts were deemed Grade 1 at the point of World War I. However, by the start of World War II, this figure had increased markedly to 7/10 and can at least be partly explained by the need for a more generalised concern with health as more and more of the domestic population became required for modern warfare.

Speaking of the general nature of the relationship between war and social policy, we are informed “...modern war casts its shadow long before it happens and...its social effects are felt for longer and longer periods after armed conflict has ceased.” (Titmuss, 1963, p. 78)

As wars have escalated in scale and intensity over time, both in terms of the numbers of casualties and the investment in military infrastructure, this has meant that “the organisation of war has enveloped a larger proportion of the total population” (Titmuss, 1963, p. 78) both in terms of the risks posed to that population and to their necessary involvement in supporting the ‘war effort’.

Another contributing factor lay in the undermining of traditional economic orthodoxy as a result of the 1929 crash and the prolonged economic crisis that followed. From this, business leaders knew long before the war that some change was needed as the obvious failure of the free market led to increasing interest in the later ideas of Keynes revolving around stimulating demand (Thane, 1982).

One of the potential pitfalls of analysing the historical development of the welfare state is that it can appear as some kind of gradual evolution. It should hopefully be obvious already that this was never the case. In the wake of the recession of the 1930s alluded to above, it was very clear that welfare provisions that did exist were not immune. As explained by Timmins (2001)...

Cutting the soaring expenditure on the unemployed to defend the gold standard became the sole touchstone of British economic policy (p. 27).

In practice, what this meant was a 10% cut in unemployment benefit when unemployment stood at 20% and a move towards increasing stigmatisation (Timmins, 2001). The point here was not purely economic since the savings were not significant in their own right. It was designed to send a clear signal to investors internationally that it was business as usual and that the poor, not the rich would be forced to pay. However, it also acted as a means of disciplining labour.

The wider point in relation to the welfare state, however, is that each crisis and the welfare cuts that follow (as they have done in the 1930s, the 1970s and those following the bank bailouts) make it increasingly clear that the ruling class and the economic system they uphold have no consistent commitment to the welfare of the mass of the

population. This is worth remembering when we encounter arguments about the supposed benevolence of the capitalist state.

One fairly common and rather unfortunate school of thought suggests that the war itself was dominated completely by an acquiescent populous and that a renewed national identity governed by compassion and solidarity had led directly to the following welfare state settlement. For example, in speaking of the suitability of the Beveridge plan after the Second World War, Furniss and Tilton (1977) state:

The feeling of national identity was high; the exercise of government authority was rarely questioned; there was a widespread belief that...social reform was proper and inevitable. (Furniss and Tilton, 1977, p. 110)

Again, Fraser (2003) mentions the "Dunkirk Spirit" and that "the nation accepted limitless sacrifices...in return for an implied promise of a...more open post war society" (p. 228). Similarly, Deacon (2002) contends that the formation of the welfare state "embodied the collectivist and egalitarian ethos that had been engendered by wartime conditions, and was characterised by the 'two ideals of universality and comprehensiveness'". (p. 4)

Unfortunately, none of this really helps explain the events that took place. For one thing, as Timmins (2001) points out the prisoner population doubled to 21,000 mainly as a result of looting, but more importantly the falsehood of the "Dunkirk Spirit" is astonishing. What Dunkirk in fact represented was an almost complete breakdown in army discipline coupled with the aid of the civilian population in the absence of any state sanctioned government support. Without this, thousands more would undoubtedly have been slaughtered.

Add in to this the impact on society of the albeit limited Beveridge proposals. The Labour Party's opposed attempt to push these proposals through in 1943 undoubtedly contributed to their convincing election victory two years later. Towards the end of Churchill's campaign in Walthamstow, some 25,000 people "booed him into silence" heckling him on the questions of jobs and housing (Timmins, 2001, p. 61).

None of this seems to suggest a completely pliant population subordinated entirely to wartime propaganda and the "Spirit of the Blitz". Indeed, it is precisely the populations' rebelliousness that better explains the development of the welfare state.

Moreover, it was also a result of the impact of increasing centralisation of the state; the movement towards universality during the war and the fact that the lessons of the previous post war period after World War 1 had been learnt.

However, despite these shortcomings, it is vital to appreciate the Second World War was a key contributing factor for the creation of the welfare state. The main proponent of this is Titmuss (1963) who states that “the aims...of social policy are thus determined...by how far the cooperation of the masses is essential to the successful prosecution of the war.” (p. 86)

Whilst technological advances in armaments mean that today this would seem to be overstating the case somewhat, there is no doubt that the idea of requiring an ever larger proportion of the state’s population in modern warfare played a key role at the time. Whether it was working in the munitions factories or on the front line, health care and access to food had to gradually be extended to the civilian population. Here lies part of the origins of the notion of universality. One of the most pressing examples of this lies in what was arguably the forerunner to the later established NHS. As Timmins (2001) explains:

As the war progressed, free treatment under the emergency scheme had gradually to be extended from direct war casualties to war workers, child evacuees, fireman and so on, until a sixty-two page booklet was needed to define who was eligible. (p. 103)

The Emergency Medical Scheme (EMS) developed partly in response to greater focus on surveys carried out during the war which showed how dire the situation was. This meant that by October 1939 there were 1000 new operating theatres, millions of bandages and tens of thousands of extra beds (Timmins, 2001). This helped pave the way for the extension which followed and showed in practice that the idea of universal health care could work.

Another example of this is that whereas in 1940, the take up for school meals was about 3%, by 1945, this has increased to 33%. Similarly, for milk the take up rate increased from 50% to 75% over the same period. (Fraser, 2003, p. 230)

Whilst it is important to recognise public attitudes only started to be subject to serious investigation during the war itself (Thane, 1982), Titmuss (1963) is correct to point out the impact the war had on people's political aspirations.

No doubt, disillusionment with the war preceded by disillusionment with years of poverty and suffering in the interwar period was becoming more and more readily apparent. As Timmins (2001) points out, as of December 1941, one in six had said that the war had shifted their political views and by August 1942, this figure had reached one in three. These shifts were accompanied by several by-elections which were lost to independents even though the main parties stood together in the same coalition. Coupled with this widespread disillusionment with the war is the impact of the numerous changes that took place as a result. Echoing the work of Titmuss (1963) and Timmins (2001), Fraser (2003) points out the impact of the evacuations.

Evacuation was part of the process by which British society came to know itself, as the unkempt, ill-clothed, undernourished and often incontinent children of bombed cities acted as messengers carrying the evidence of the deprivation of urban working class life into rural homes. (p. 230)

From this, social problems became more widely recognised but the process of the evacuations themselves again showed the importance of state directed infrastructure and planning to organise them effectively. Similarly, the impact of rationing had a quite important ideological impact, with the notion of "Fair shares for all" (Timmins, 2001). Whilst vitally important in successfully prosecuting the war, this notion is somewhat double edged since it tapped into an underlying resentment of privilege and class divisions.

Another important impact of the war lies in the complete restructuring of the domestic economy towards arms production. The impact of widespread migration into employment in weapons manufacturing was a significant and turbulent reflection of how the state took on a greater and greater role in directing investment. As Timmins (2001) shows, unemployment which stood at some 200,000 in 1941 fell to around 63,000 by 1943 with wages increasing over the same period. As alluded to by Fraser (2003), the idea of near full employment raises questions about why this did not take place outside wartime conditions. Clearly, this raises expectations and shows up the weaknesses of unemployment as a product of individual attributes as is so often put

forward. This fall in unemployment had an important impact on labours relative bargaining power as well on the termination of the war – a point to which we shall return later.

Whilst the war itself is central to understanding the context of the welfare state, for many, the key factor was found in the Beveridge report in 1942 (formally titled “The Social Insurance and Allied Services” report). These changes included “all in insurance’, flat rate contributions and benefits, children’s allowances, provision of free health and education and the forwarding of a full employment policy” (Furniss and Tilton, 1977, p. 105). Importantly, the report spoke of eliminating what he called the “Five Giants” of Want, Disease, Ignorance, Squalor and Idleness and although these were often more inspirational than concrete proposals, it shows why the report received such a warm response (Fraser, 2003).

For Beveridge himself, it served a vital purpose in partially restoring poor wartime morale and he was keen to avoid any attempt at genuine redistribution. As stated in Ferguson et al (2002) the main ‘redistribution’ was between families with no children and those with children. Specifically, from 1936 to 1960, the share of wealth for the top 5% was only reduced by 4%.

As pointed out by Titmuss (1963) Beveridge’s focus was more a question of effective tactics in wartime than a genuine humanitarianism. Considering “civilian morale” we are informed of Beveridge’s belief that the war will depend on people being “convinced that we had something better to offer than had our enemies –not only during but after the war” (p. 82) Similarly, Titmuss (1963) claims that you can only have a sufficiently pliant population if “social inequalities are not intolerable” (p. 85). This line of argument would certainly be backed up by quotes from Beveridge himself. As cited in Timmins (2001)...

....the purpose of victory is to live in a better world than the old world...[where the individual was] more likely to concentrate upon his war effort if he feels that his government will be ready in time with plans for that better world. (p. 41)

Furthermore, Beveridge was keen to point out the economic advance that could be made through investment in health and education providing workplaces with healthy and educated workers who could compete more effectively with other non-domestic

units of capital. Tied into this is the idea of political stability upon which future long term growth was deemed to rest (Ferguson et al, 2002).

It is essential, therefore, to see that the Beveridge plan was never about equality<sup>15</sup> but instead was “essentially liberal, designed to combine basic security (enough to live on at all times) with freedom of the citizen to manage his own life and that of his dependents and the responsibility for doing so.” (Furniss and Tilton, 1977, p. 106)

Moreover, as the same authors go on to explain...

The governing principle is clearly not equality but equality of opportunity. In the words of the Beveridge Report, ‘the state in organising security should not stifle incentive, opportunity, responsibility; in establishing a national minimum, it should leave room and encouragement for voluntary action by each individual to provide more for himself and his family (Furniss and Tilton, 1977, p. 18).

However, we must also recognise that:

The public commitment to a guaranteed national minimum for every citizen, the provision of benefits for all ‘adequate in amount, that is to say enough for subsistence without other resources, and adequate in time, that is to say as long as the need lasts’, marks a momentous step in the direction of collective responsibility for individual maintenance. It makes plain the failure of a system of private property to provide universal security and the duty of the state to fill the void. (Furniss and Tilton, 1977, p. 15)

In this way we can see that although the populations’ aspirations were not fully met by the Beveridge Report, the increased involvement of the state was an important landmark in recognising free market failure and ideologically breaking the idea that the state had no responsibility to provide for its citizens. However, to begin with, even these modest proposals were by no means unanimous amongst the ruling class. Tory MP Quintin Hogg (later Lord Hailsham) for example, supported the Beveridge Report seeing it as “publically organised social services and privately owned industry”

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<sup>15</sup> There are definitely comparisons with the speech of Scotland’s First Minister Alex Salmond whose speech to parliament was very much in keeping with this tradition.

<http://news.scotsman.com/politics/In-full-Alex-Salmond39s-statement.6774838.jp>



presumably recognising that the latter could benefit from the former. However, Churchill amongst many others was initially opposed. As Thane (1982) explains...

...most ministers were fearful that an over hasty commitment to long term social reform would hamper the prosecution of the war and retard post war economic revival. (p. 264).

Similarly,

The Treasury warned about competing claims on the post-war budget, when the restoration of trade would have to take priority and industry was not to be overburdened with extra costs. (Fraser, 2003, p. 242)

This position was reflective of what Churchill saw as “dangerous optimism” (Fraser, 2003) and whilst influenced by questions of affordability was also conditioned by two other factors. Firstly, Churchill believed this to be an unnecessary distraction from the war and secondly (and in relation to this) was the danger of fragmenting the Labour / Tory coalition which itself was divided on the Beveridge report (Fraser, 2003).

This period of social policy more generally is best thought of as a post war consensus between different elements of the ruling class, evidenced by the respective support of both Labour and the Conservative government elected in 1951. This is summarised as being a commitment, at least in rhetoric, to:

...support for a mixed economy, a commitment to full employment and to a comprehensive welfare system, the active conciliation of trade unions and support for the United States in the era of cold-war politics (Ferguson et al, 2002, p. 157)

It is vital to appreciate the dialectical interaction between government actors and broader social change.

While a broad ‘Keynesian-Beveridgean consensus was established between the major political parties in the post-War era, if the Conservative Party, rather than Labour had been elected in 1945 the welfare state would have been significantly different in a number of key areas – most notably in terms of health care provision which would not have taken the form of a nationalised NHS. (Ferguson et al, 2002, p. 41)

However, that being said, it would be wrong to see the welfare state in general as taking place because Labour were brought to power.

In most states welfare developments were initiated by conservative or liberal parties – rather than social democratic ones – and even at the high point of welfare state expansion conservative and liberal parties were not opposed to welfare settlements. Indeed, in Britain, for example, more council houses were built by the Tories in the 1950s than there was by Labour in any equivalent period and...more comprehensive schools were opened while Margaret Thatcher was Minister of Education than at any other time. (Ferguson et al, 2002, p. 42)

This shows the underlying dynamic was not simply the people who were elected into parliament. Despite the obvious importance of the Beveridge report and the role of the Labour party, it would be a mistake to focus solely on this. Clearly, individuals from Beveridge to Bismarck played a historic role in shaping policy. It would be foolish to claim otherwise. However, the key point here is that these ideas were not formed out of their own heads in abstraction from events which took place around them and to which their ideas and strategies were a reflection.

There is no doubt that the wave of radicalisation which took place during and on conclusion of the First World War internationally had a significant impact on focusing the minds of the ruling class. The Russian Revolution in 1917, followed by near revolutions in a number of European countries, not to mention the 1919 rebellion in George Square and a 1926 UK wide General Strike are all testament to just how deep and widespread this was. All this had a major impact on the calculations of the powerful on termination of the Second World War. There is no doubt that history had taught them some valuable lessons. As stated by Tory MP Quintin Hogg in 1943 “if you do not give them social reform, they will give you social revolution”. Albeit anecdotal, Timmins (2001) shows how the ‘threat of Bolshevism’ played a direct role on concessions with a non means tested unemployment benefit being granted in 1919.

Crucial to understanding the development of the welfare state is the backdrop before the war. Here, we must appreciate the context of the suffering which was endured during the inter-war years of the 1920s and 1930s including long term unemployment, hunger and disease exacerbated further by dismal housing conditions (Ferguson et al, 2002). In addition, it is difficult to understand the post war US aid under the Marshall

Plan without recognising the “determination of the USA to encourage the reconstruction of the economies of Western Europe to prevent the recurrence of depression and of the socialist threat of the post 1918 period” (Thane, 1982, p. 266). In large part there was thus an expectation and a demand that after the war there be no return to these conditions.

Following on from this, instead of some false appeal to the “Dunkirk Spirit”, Thane (1982) points to the “increased political and industrial conflict” towards the second half of the war representing the likelihood of ‘containment’ being a more reasonable explanation than Dunkirk. In explaining the role of Bevin, Timmins (2001) explains that he “had been brought in from the general secretaryship of the [TGWU] union to provide the sound base for labour relations in wartime that the First World War had so notably lacked”. (p. 17)

Similarly, as Gough (1979) explains...

In the industrial field the growth of union membership during the war was combined with the establishment under Bevin of ‘tripartism’ as a means of controlling industrial conflict and securing strategic agreements between business and trade unions. This unique configuration of circumstances contributed to this the key role which the welfare state (the very term originated in this period) played in post-war Britain. But underlying these specific national features were the twin forces distinguished above. The experience of modern total war *both* strengthened the leverage of the labour movement *and* gave further impetus to centralisation of the state (partly in reaction to the first). The result was a rash of social legislation and the foundations of the welfare state in its present form (Gough, 1979, p. 71).

Gough (1979) holds that the relative strength of the labour movement at this time was a result of:

- i) the trade union growth since the 1930s
- ii) the relatively unified nature of individual trade unions
- iii) the shop stewards system
- iv) the relatively high level of union membership compared to the other major capitalist economies. (p. 73)

Gough (1979) also speaks of the “greater integration of trade union and working class party leaders within the state”. As Panitch (1977) explains there were good reasons why the capitalist class and its representatives were actually quite supportive.

The necessity of sustaining trade union co-operation during the course of the war with the promise of continued prominence in decision making after the war and a commitment not to return to pre-war conditions, the recognition that the experience of full employment and comprehensive planning had led to rising expectations of a post war rise in living standards and security on the part of the working class, the example of the Soviet economy (much played up during the wartime alliance) and the concern regarding its effect on the working class in the post war period, and, finally, the mass radicalism that exhibited itself in the electoral success of working-class parties in the immediate post war years. (Panitch, 1977, p. 76)

It is important to recognise that the welfare states continued existence stems from material conditions in respect to the long post war boom which took place allowing concessions to be granted.

One must take into account the rate of development of the capitalist world economy and its international context, and the place of each country within that world economy. This will also determine the ability of the state to concede the reforms demanded by the labour movement and/or representatives of the capitalist class. (Gough, 1979, p. 68)

Gough (1979) goes on to explain:

When productivity increases year by year, even at relatively low British rates, conflicts over social policy and other matters may more easily be resolved. A growing national product permits all groups to gain a larger slice; profits and real wages can both increase over time. This provides the material base for reformism and the welfare state. (Gough, 1979, p. 151)

Needless to say, these conditions have not operated since the 1970s and, as a result, the increasing and largely successful attacks on trade unions and the corresponding lack of a consistent fightback helps to explain the catastrophic losses people have and continue to suffer in terms of welfare provision.

In conclusion then, the welfare states origins can be explained by a combination of factors, none of which centre around assumptions of altruism or benevolence of the state or particular government actors. Whilst we must see all the factors mentioned as inter-related with the development of each affecting the other in the process, it is important to recognise that there was no formula that made the welfare state inevitable. In other words, the welfare state is not a function of war. The level of political and industrial turmoil conditions opinion on how to fight a war effectively. Similarly, the ability to gain concessions after the wars conclusion was a recognition that the level of political instability by not granting them was deemed too severe. The impact of the revolutionary upsurge after the First World War was central here in influencing this development. People's actions conditioned and shaped the response of their leaders.

### ***5.5 What is to be done?***

Furniss and Tilton (1977) ask the questions "Can the reforms necessary to establish a social welfare state be implemented in advanced capitalist societies? Or if one desires 'real social equality' does the capitalist generation of economic wealth within what is basically a capitalist economic order make the dream impossible?" (p. 21)

Writing in the 1970s, Gough (1979) states that taking into account:

...the adverse effects of the economic crisis and the steady growth in needs, all of which necessitate a year by year increase in expenditure simply to stand still, it is apparent that the level and quality of many social services must have fallen. (p. 129)

Furthermore,

Obligations to clients [in public services], in however distorted a form, will continue to conflict with the demands of capitalist rationalisation. (Gough, 1979, p. 143)

As stated previously these points would seem to be evidenced by repeated attempts to cut back welfare in times of crisis, from the 1930s, the 1970s to the present economic collapse.

In defending the idea of the welfare state, the wasteful consequences of impoverishment are pointed out.

Groups that lag behind, unable to use their abilities to contribute to the common good, hinder the attainment of economic efficiency as well as social justice. Inequality wastes 'human capital' (Furniss and Tilton, 1977, p. 31).

None of this, however, means that we cannot obtain reforms under capitalism.

Marxism...does not rule out a priori the possibility of significant social reforms or welfarism taking place within capitalism...Whether and to what extent, welfare expands depends on how the class struggle in its fullest sense progresses and unfolds within society can only be seen as the product of history.(Ferguson et al, 2002, p. 35)

It would be far easier for the ruling class were working class people simply to accept their lot. It is not necessary to say that the ruling class in one uniform block supports or opposes some but merely that they often only do so in relation to the conditions they find themselves operating in. In this sense, whilst it is correct to state that permanent large scale welfare is inconsistent with the demands of capital, it does not mean that given certain conditions they cannot co-exist. The point is that this does not mark some new equilibrium or balance and that the tensions that exist between these two conflicting goals will express themselves.

In terms of how we relate to the welfare state Gough (1979) argues:

Those of a socialist persuasion who regard the welfare state as a creature of capital, pure and simple, will have nothing to do with defending or extending it. On the other hand, those who see it as the creation of labour, as a socialist island within a capitalist sea, will fix their standard to the welfare state as it exists. (p. 153)

However, there was a recognition that in order to achieve the integration Titmuss desired "welfare had to be...universal and it had to be non-judgemental. Benefits and services which were available only to the poor, or which attempt to distinguish between the deserving and the undeserving, would serve only to divide and alienate" (Deacon, 2002, p. 17).

Similarly, “it is...necessary to argue for state provisions which are universalistic, which are anti-oppressive and which promote equality, and against those which stigmatise, divide and promote selective forms of delivery” (Ferguson et al, 2002, p. 35).

This concept of equality goes beyond the liberal idea of equal opportunity. It mandates more than simply an equal start or the right to compete on equal terms. Not only is the liberal ideal virtually impossible to implement without sharp redistributions of power and wealth, but it can easily lead to a meritocratic society stratified on the basis of differential personal accomplishment, however accomplishment is defined. The social welfare state’s conception of equality requires a society free from class barriers, not merely at the beginning of an individual’s life but throughout it. (Furniss and Tilton, 1977, p. 29)

The position we take must respect the contradiction that exist within the welfare state but also appreciate how people relate to the welfare state at present. In this way, while taking a different position to Gough (1979), the idea he states of referring to “human need” is a vital one. You cannot simply state when someone asks you that the welfare state is contradictory. One alternative is to make it clear that capitalism cannot reliably defend the positive aspects of the welfare state that people identify with. The ultimate solution, therefore, is to remove the contradictions that prevent us from meeting human need in the first place by replacing an economic system that subordinates all other considerations to the pursuit of accumulation and profitability. However, on its own this is too abstract as explained in more detail in the section on reformism in Chapter 3. Anyone interested in human welfare must raise the slogan immediately of “Defend the welfare state” as a rallying call to defend the ideals of equality and human need and to challenge the states seemingly automatic right to restructure in the interests of the banking institutions and the ruling class more generally. We must recognise that in the process of doing this, it will raise wider questions about the type of society in which we wish to live, giving hope to the only force capable, when mobilised, of consistently and reliably defending and expanding welfare more generally. In so doing, the possibility of a society of genuine democracy and equality turns us away from the scapegoating, war and competition which characterises society today and is so detrimental to human development.

This chapter has outlined the importance of the development of the “welfare state” in Western European economies. Overall, this section has developed three main lines of

argument. Firstly, it outlined how the development of the welfare state (for disabled people, carers, or anyone else) was not rooted in an evolutionary development under capitalism, or as a result of altruism from government actors. For one thing, the ruling class was divided on the question of the welfare state. Moreover, there were tactical reasons for its adoption, as consent is a more stable form of control and the welfare state developed as a specific response to the threat of a more radical alternative after the end of the Second World War. At the time of writing, the temporary nature of these gains after neoliberal reform and especially in the context of economic crisis should be clear for all to see.

Secondly, it sought to build on the more critical accounting literature (Catchpowle et al, 2004; Cooper et al, 2005; Gray, 1998; Sikka, 2000) to challenge dominant views of the capitalist state as expressed in numerous works (Lehman, 1999; Ball and Seal, 2005; Carnegie and West, 2005) and to provide an alternative theorisation. The welfare state has probably been the most enduring argument of reformist theorists that class based models are now irrelevant and that capitalism has been tamed. In this sense, it sought to take on these arguments with what seems like their strongest argument, rather than their weakest (i.e. when the state breaks strikes, launches military conflicts etc.).

Finally, it sought to help try to explain why carers groups, and much of society more generally believe the state has a responsibility to provide for people. Here, the welfare state is held to be central in this change in ideology. Clearly, this has been attacked consistently under neoliberalism but much of this ideological shift remains to this day. This chapter therefore also helps to lay the groundwork for the subsequent three chapters (6, 7 and 8) which constitute the attempt at social accounting with respect to unpaid care.



## **Social Accounting for Unpaid Care in Scotland**

### **Chapter 6: Carers**

#### **6.1 Introduction**

The following chapter will attempt to provide an introduction to some of the issues surrounding carers. This will involve briefly explaining the concept of care but importantly will also look into legal rights to support and available financial help in terms of social security. Furthermore, this chapter will look at some of the broader financial and social impacts of the caring role. In addition to this, it will also look into the demographics of care in terms of the relationship to the person being cared for as well as the ages and gender of the carers.

Largely, it will not include a historical analysis of the caring role as this will be carried out in Chapter 8. Instead, this chapter will attempt to explain the current situation facing carers, whereas Chapter 8 will look into *why* this situation might be as it currently stands. For this reason, this brief chapter will attempt to focus on data already provided by previous research in a manner consistent with the approach explained in chapter 3 on methodology. One of the problems encountered is the paucity of readily available information on this question. Therefore, the data for this chapter is predominantly taken from Carers campaigning sites. However, contrary to this being a problem, accounting for carers' position does not entail "neutrality" or an objective distance. The inevitably partial stance taken by government ministers who will explain why change is impossible can only be effectively challenged with an equally "partial" critique. As always, "facts" are open to interpretation. This is, in any event, central to the research motivation outlined in Chapter 1.

#### **6.2 What is a Carer?**

The main conception of care and carers is by and large defined as those who help someone else with an illness or disability. "Informal carers", by contrast, is simply a

reference to the fact that it is unwaged. It is preferred to the term “voluntary” care since this implies both a link to the voluntary sector and implies a choice that many carers simply do not have. However, even from a cursory glance at a Carers UK blog, even the term “informal care” is problematic. As the Carers Scotland (2007) pamphlet “Carers and Their Rights: A guide to the law relating to carers” explains:

Some academic writers have used the term ‘informal carer’ to distinguish actual carers from care workers who are often wrongly described as carers. Many carers actively dislike the term, seeing nothing informal about caring for substantial amounts of time. The term is therefore not used in this guide. (Carers Scotland, 2007, p. 8)

If the very use of the word “informal” implies undervaluing the care provided then this is clearly an important part of the discussion. For carers themselves, the term is therefore intimately bound up with a value judgement about recognition of their role in society. This debate is remarkably similar to discussions about Marxist use of the terms productive and unproductive labour being distinguished by the formers more direct role in creating surplus value (Marx, 1976). This discussion about recognition is an example of dialectics in practice. Here, there is a pressure to formalise the carer relationship and “recognise” it in the sense of time provided caring and social worth, yet this conflicts with the rationale of capital accumulation, thereby limiting the extent of said recognition in practice. However, then, as now, “informal” is often not used as a value judgement of what the author personally values but as a reflection (wittingly or otherwise) of the economic relationships under capitalism which devalue all types of work not deemed part of the “formal” economy. Here, the idea that we can ignore or devalue anything that is not immediately reducible to the profit motive is thoroughly rejected.

Given that scientific terms can also have an ideological impact, here it is held alternatives should be used where available to avoid misinterpretation. As a result, for the purposes of this research, the term “unpaid carers” will be used<sup>16</sup>, thus remaining consistent with terminology currently used by the Scottish Government (2012). However, this research distances itself from arguing that “care workers” are not “actual carers”. This is problematic since additional support for “unpaid carers” would

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<sup>16</sup> For the purposes of this research where the word “carer” is used for brevity, however, this should be taken to mean “unpaid carers” unless otherwise stated.

presumably at least partly require a greater role and expansion of these same “care workers”. Furthermore, it would be a mistake to try to hegemonise or create a hierarchy for the term “carer”. This term applies to the broader family of care, if you will, within which we have “unpaid care” and “care workers”.

What compounds the problem for carers is that many see their role as something both normal and expected and so not worthy of separate classification. As pointed out on the NHS choices website:

Many carers don't see themselves as carers. It takes carers an average of two years to acknowledge their role as a carer. It can be difficult for carers to see their caring role as separate from the relationship they have with the person they care for, whether that relationship is as a parent, a son or daughter, or a friend (NHS, 2011).

In this way, we can begin to understand the figures for the carers' relationship to the person being cared for.

### ***6.3 Demographics***

One of the largest reports of its kind carried out in Scotland, the Care21 Report (Scottish Executive, 2006), shows that 43% of carers care for a partner or spouse; 28% care for a parent or parent in law; 30% care for their son or daughter and 5% care for a friend or neighbour.

Statistics from 2002 show that the majority of carers in Scotland are women, representing 62% of the total (Central Statistics Unit, 2004). The UK wide Census for 2001 also shows women to be more likely to be carers than men, here representing 58% of the total figure (Carers UK, 2009). However, the figure increases greatly in terms of those responding to carer research with 74% of respondents to the Care 21 report being women (Scottish Executive, 2006, p. 155) with a 67% figure for the Carers Scotland (2011) report “Sick, Tired and Caring”. 78% of respondents to the Care 21 report were 45 or above with 44% aged 60 or over (Scottish Executive, 2006, p. 155) thus not being within the age range of those deemed “productive”.

One point of note given the poor level of financial support is that 72% of carers responding were not in paid employment (Scottish Executive, 2006). This is higher

than for studies conducted among the general population with figures of 62% for Scotland<sup>17</sup> (Carers Scotland, 2012) and 50% for the UK (Carers UK, 2009). Despite this, it gives some insight into carers' employment patterns. The employment statistics from the Care 21 Report (Scottish Executive, 2006, p. 156) are broken down as follows:

- Retired 41%
- Working age but not seeking employment 24%
- Seeking work 3%
- Students 3%
- Voluntary 1%
- Employed full time 12%
- Employed part time 13%
- Self employed 3%

#### ***6.4 Carers Allowance***

Although universal credit is set to be rolled out at a UK wide level in October 2013, there are a number of uncertainties about exactly how this will be implemented and thus how it will affect carers. Carers will be negatively affected by changes in disability benefits; changes in council tax; housing benefit; and the movement of working age carers on means tested benefits onto Universal Credit. Of course, if anything these changes make the financial situation much worse and so the difficulties outlined here will, if anything, understate the case for greater carer support. However, in terms of available financial support, the benefit ostensibly available for carers remains the "Carers Allowance". This non means tested benefit is just £55.55 per week (as at 15/12/2011). Qualification in the first instance is largely based around the qualification of the disabled person to one of three benefits. According to the UK Government (2012b) site DirectGov, these include:

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<sup>17</sup> This was found by subtracting the 250,000 figure cited for the number of working carers from the total number of carers (660,000-250,000 = 410,000) and dividing it by the total number of carers in Scotland of 660,000.

- Disability Living Allowance
- Attendance Allowance
- Constant Attendance Allowance

If this is satisfied, there are then a series of other barriers to obtaining the benefit.

First of all, you are required to care regularly for 35 hours or more per week. Here, “regular” simply refers to this being at least 35 hours each week and not, for example, 34 hours one week and 36 hours the next week averaged out over the two week period (Osborne, 2010). Aside from the fact that this discounts all care carried out for less time than this, it also fails to recognise that many disabilities and / or illnesses do not occur “regularly” in this way. During a particularly difficult period, the amount may rise enormously, whereas at other times the need for support may not be so great. Put simply, disability is often “irregular” in how it is expressed in terms of required support. This point is completely ignored in both the forms for disability benefit but also for carers’ allowance where you find yourself writing “it varies” and feeling guilty or worried for not answering the question on their flawed terms.

In addition, according to the Committee of Public Accounts (Supporting Carers to Care, 42<sup>nd</sup> Report of Session 08-09) one fifth of carers who receive benefits have difficulty with the application process and that the relationship between carers’ benefits and those they care for causes additional confusion (National Information Forum, 2009).

Moreover, if you care for more than one person, the 35 hours cannot be made up of a simple addition of all the people you care for since it has to be 35 hours for one person.

Secondly, you also must not be in “gainful employment” (Osborne, 2010). This is defined as giving you an income of £100 (as at 24/1/2012) or more after certain deductions such as Income Tax. Even for work at the National Minimum Wage of £6.08 (as at 24/1/2012) this would not be more than 16 hours. Therefore, for those who care and are in full time work (or even are just above the “gainful employment” earnings limit), there is no financial support for the caring role.

Furthermore, you also cannot be in full time education which is classed as anything more than 21 hours per week. However, perhaps the most distressing findings are the rules regarding other benefits and income.

For example, if your retirement pension is greater than the Carers Allowance amount you do not receive the funds but have what is called an “underlying entitlement”. Quite why you should receive no support, in effect because of your age seems quite odd and unreasonable. This is then compounded by the series of other benefits for which Carers Allowance is classed as income. These include:

- Bereavement benefits
- Maternity allowance
- Severe disablement allowance
- Incapacity Benefit
- Contribution based JobSeekers Allowance (JSA)

Whilst there is a “carer premium” available, there are serious limitations to this as well. The carer premium is an additional amount included in the calculation of Income Support, Income Based Job Seekers Allowance, Employment and Support Allowance (formerly Incapacity Benefit), Council Tax Benefit and Housing Benefit. This carer premium of £31 per week (as at 24/1/2012) is added to your correspondent benefit and the carer addition works the same way but for pension credit.

For example, if a carer was on income based jobseekers allowance it would work as follows:

Income based jobseekers allowance: £67.50 (as at 24/1/2012)

Carer Premium: £31

New rate of jobseekers allowance: =£67.50 + £31 = £98.50

In order to qualify you have to be entitled to carers allowance (whether this takes the form of cash paid into your account or simply “underlying entitlement”). What should be taken into account is that this is not an automatic increment for those on carers allowance given the conditions involved. Secondly, if it is supposed to be a response to the problem of “underlying entitlement”, £31 per week is hardly recognition of the

value of the care carried out. This is without even mentioning that for a disabled person living at home by themselves, someone who would otherwise have “underlying entitlement” claiming for Carers Allowance to care for them (and hence qualifying for Carer Premium (of £31 a week) can remove the disabled person’s entitlement to Severe Disability Premium (£55.30 as at 24/1/2012) representing a net loss.

It is precisely confusing situations like this that make access to benefits so tortuous and limited.

Another possible situation in which Carers Allowance can be affected is if either the carer or the person being cared for have to enter hospital. In this case, Carers Allowance can only be paid for 12 weeks in a 26 week period. It is unclear what the carer is expected to do if the person being cared for is in hospital. Finding work after possibly being out of the ‘labour market’ for a prolonged period at precisely the time when you would want to visit and support the person in hospital seems unreasonable. This is without even mentioning the fact that hospital visits take up a great amount of time and can be very costly. Whilst technically you would get a higher payment if you were a carer on JSA, this misses the point. Carers are not necessarily actively seeking work as a result of their caring role. In addition, it also ignores the constant back and forth nature of changing your benefit entitlement for what is possibly only a short time and then changing it back again afterwards with all the resultant difficulties this can cause when your claim is being processed. Given that it can take weeks to process any new claim, it seems reasonable that a carer would want to continue being able to eat and pay bills regardless of whether or not the person they care for is in or out of hospital.

Clearly, there are a great many barriers to obtaining the carers allowance which itself is only £55.55 per week.

### ***6.5 Free Personal Care***

Whilst not applicable to all, another area which has an obvious impact on many carers is the provision of “free personal care” in Scotland introduced in July 2002. This is available for the disabled person and they must be 65 or over and assessed as needing the care by the local authority. This “free personal care” is defined as...

...care which relates to the day to day physical tasks and needs of the person being cared for... (Section 2 (28), Regulation of Care (Scotland) Act (2001) cited in Bell et al, 2007)

Unfortunately, this has been subject to a number of different interpretations so, for example, it is argued that it is unclear whether “meal preparation” should be charged for or not. In addition, it is also unclear whether helping people to put on pressure stockings is a “health” issue or a “personal care” issue and thus confusion reigns as to which budget this activity should come from (Bell et al, 2007). Of course, this is without even mentioning whether the budget amounts are sufficient to meet people’s care needs in the first place. Free personal care only covers certain aspects of care and these remain ambiguous. It is little wonder that many staff seem to think much of the distinction is blurred to the point of ridicule. However, the implications are important. Governments and councils, can, to a degree, financially benefit from this since in the short term the consequences may well be that the tasks deemed “ambiguous” are simply not carried out. Obviously, this has important knock on effects on both the carer and the person requiring care.

However, the complications do not stop there. The assessment of needs required to grant free personal care has come under scrutiny for the build up of “waiting lists” where people may have to wait some time before they receive the support. The councils, for their part, cite “complex care needs” as one reason (Bell et al, 2007, p. 10) but it seems unclear why this automatically leads to a delay in the provision of personal care. The second reason is one of finance but again this is problematic. If you have an obligation to provide a service, the financial arguments are surely not relevant to what is a legal duty.

More directly with respect to carers, according to some research there is no evidence that carers are withdrawing their care once free personal care is granted (Bell et al, 2007). However, the report also notes that there was sometimes an initial withdrawal until it was made clear how limited this service actually was in practice. This being said, it does seem that there was a qualitative shift in the sense that carers would withdraw from personal care activities, allowing more time for social interaction with the person being cared for. In this way, the overall amount of care given appears to have increased as a result as well as providing some support for the carer.



## **6.6 Legal Rights**

This then brings us on to the question of carers' legal status and legal rights. The Carers (Recognition and Services) Act of 1995 went some way towards progressing the carer cause in terms of legal recognition and the right to an assessment of the carers needs (Carers Scotland, 2007). Tied into this was a challenge to the idea that this role should be automatic or simply an expected part of human existence. This was then reinforced by the Community Care and Health (Scotland) Act of 2002 which granted:

- Free Personal Care (as discussed in the preceding section)
- The need to consider carers views in deciding on the support given by the social work departments.
- The right to an assessment of the carers needs, even if the person receiving care does not wish to have an assessment. (Carers Scotland, 2007)

With respect to the last point, the assessment is available whatever the age of the carer. Moreover the local authority must proactively seek to publicise this right.

During the carer assessment, the focus is to determine whether the current role is "sustainable". This effectively asks two questions. Firstly, whether the care could continue without greater assistance and what the risk is of the role becoming unsustainable. This can then be boiled down to two further questions:

- Is the carer "willing and able" to continue in their caring role?
- What is the likely long term impact on the carers own health? (Carers Scotland, 2007)

The key difference, however, between a carers assessment and the assessment for the disabled person is that the local authority is under no obligation to make services available.

With respect to a carer requesting support, the process is usually as follows. As part of a Community Care Assessment, a social worker will gather the relevant information and assess the needs of the disabled person. They will then be deemed as either "high, medium or low" on the eligibility criteria. The key question here is what is likely to

happen if the council does not provide support and whether the person would suffer “significant harm”. Clearly, “significant harm” is quite a high benchmark and “detriment” would be far more suitable to avoid the inherent discrimination against disabled people in this process. The very wording of the legislation always allowed for a gap to emerge between existing need and social provision.

It is only at this point that the carer assessment would normally begin. The focus is on whether the carer is willing and able to carry out some or all of the caring needs.

This information is then combined to form a care plan.

Another connected legal right is the right of the disabled person to obtain respite care when the carer takes a break or is unable to continue. Again, however, the underlying logic of this does not seem to be tailored to either the needs of the carer or the person being cared for.

As cited in the Carers Scotland (2007) pamphlet, guidance to the 1995 Act states that:

...some of the most *cost effective* care packages were where carers continued to perform caring tasks but were given sufficient support and respite to enhance their wellbeing and maintain their own health (p. 33)

Therefore, it appears that both in terms of the focus on the carer assessment and the right of the disabled person to respite care, the underlying logic is one of minimising long term costs. This is quite different from providing adequate support to ensure the right of disabled person to a decent standard of living with no unmet needs arising as a result and the same opportunities as everyone else to take part in what society has to offer. This focus also inevitably denies carers a genuine choice about whether or not to continue their caring role in its current form. Presumably we believe that carers should have the same rights and opportunities as everyone else. However, whilst carers have limited rights to unpaid time off work in order to care, it was only when the Sharon Coleman case emerged that this was given any serious prominence. In this instance, the carer was accused by her manager at Attride Law in London of using her child’s condition to get out of work. The European Court of Justice later ruled that this was evidence of “discrimination by association” as she was effectively bullied as a result of having a disabled son (BBC, 2008).

Finally, what is absolutely crucial in all of this is that regardless of the difference between formal legal rights and the reality of the treatment of carers we must remember “the state has a positive obligation to provide support” (Carers Scotland, 2007, p. 25)

Whilst there is a justified critique of the welfare state as serving the interests of capital and reinforcing the dominant logic by regulating behaviour, it is important to draw out those aspects which genuinely meet social need. The key here lies in arguing for universal provision which does not stigmatise or place onerous conditions on access to support. Government actors cannot legitimately assume that carers can continue in their caring role or that they are automatically willing to do certain tasks. The difficulty, however, is that without substantial political blowback, governments and local authorities are unwilling to change from the present situation as they are saving a great deal of money.

Despite their limitations, the formal legal rights won are a step forward. However, only a continuation and escalation of the campaign of both carers and the disabled allied to a wider social movement will ensure that these formal rights are effectively realised.

### ***6.7 Social and Financial Impacts of Care***

It should be relatively clear by this point that taking on a caring role is no easy task and has a number of impacts, both financial and social.

One of the most commonly cited statistics is the equivalent cost of the care that carers provide if it was provided by the state. In Scotland, the saving is estimated at some £10.3 billion (Carers Scotland, 2012). Whilst we should be careful of how we use this information, it gives a clear indication of the volume and importance of the caring role to the person being cared for.

What angers a great many carers is that despite this contribution, in Scotland they are losing on average some £11, 291 per year in earnings (Carers UK, 2007b). This financial disadvantage is also reflected in research carried out by Carers UK which showed that 72% were harmed financially as a result of their caring role (Carers UK, 2007a, p. 3). This is attributed to lost earnings, but also to the extra costs associated

with disability, the charging for different services and the lack of sufficient disability benefits (Carers UK, 2007a).

In addition, the following summary of statistics (Carers UK, 2011) found that of those carers responding to research in Scotland:

- 47% have to cut back on food and heating
- 58% are in fuel poverty<sup>18</sup>
- 68% cut back on clothing.

This financial difficulty has a knock on effect on the ability to fund support. For the UK as a whole, 66% spend their own income / savings to pay for care and 49% have cut back on caring support due to limited finances (Carers UK, 2008b, p. 7)

However, this focus on the financial implications of care do not seem to be replicated in the Care 21 report initiated by the Scottish Executive (2006). The projections contained within the Report ask people to indicate whether they think things will improve or get worse in the future based on different scenarios. The suggested trajectory is for an ever worsening series of pressures to be placed on government actors and our role therefore becomes one of managing this decline, rather than radically altering the situation.

Furthermore, when asked what the Scottish and / or British governments could do to help, the responses available are confusing since this question requires people to select 3 responses that are important and to rank them in order (Scottish Executive, 2006, p. 188)

**Table 5.1 Ways in which the Scottish Executive and/or Westminster can help improve the lives of carers**

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<b>Important</b>	<b>Most important</b>
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<sup>18</sup> Where fuel poverty is defined as spending more than 10% of your income on fuel bills.

Giving carers a right to regular breaks from caring and providing more and better quality respite options	51	26
Increase benefits of people with support needs	40	21
Offer cash payments rather than services so carers can arrange care according to their own needs and preferences	36	20
Ensuring that statutory agencies and the voluntary sector work better together with carers as full partners	36	16
Easier access to, and better information for carers	35	17
Better support to access services/voluntary and/or statutory support organisations	33	14
Replace carers' benefit (Carer's allowance) with carers' income and pension credit	32	21
Better support to manage the condition and/or situation of the person you care(d) for	32	13
More support from employers for people with caring responsibilities	28	12

The column on the right should add up to 100%. However, instead it totals some 160%. In addition, the phrasing of some of the possible responses is open to criticism. For example, "Replace Carers' Benefit with carers' income and pension credit" does not make it clear whether you would be better or worse off and is needlessly prescriptive. Similarly, "Better support to access services" is quite different from saying "Improved external provision of care" which would presumably have obtained a far higher response rate. Not only this, but the phrase "Offer cash payments rather than services **so carers can arrange care according to their own needs and preferences**" (emphasis added) completely ignores the controversy over direct payments and seems evidently biased.

These arguments seem to be strengthened by the fact that when asked "What needs to be changed to improve the lives of carers in Scotland?" Financial / Resources was the most common answer (Scottish Executive, 2006, p. 193). However, at 19%, less than 1/5 of respondents seem to rank this as one possible improvement.

%

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Financial/resources	19
Respite/carer breaks	18
More advocacy/emotional support for carer	18
More/better external care support	17
Communication/information/advice	17
More practical support for carer	10
Better coordinated/less bureaucratic services	7
More/extended specialist healthcare (i.e. medical/nursing)	5
Easier access to care/more flexibility	4
Housing needs	4
Day-care/day centres	3
Transport	3
Employers	3
Better assessment of needs	3
Childcare/education	2
Better trained staff	2
More recreational activities	1
Improve hospital care	1
Improved disabled access	1
Others	4

Base: 1720

Non-response: 2547

Perhaps carers believe that choosing financial/resources would seem selfish in some way. This would certainly be in keeping with the work on the family and the idea of “family duty” outlined in both the interviews and the section on the family which follows. Here, the ideological hold of the family does not prevent people articulating demands for greater financial support but weakens their confidence in doing so.

In addition, for the above question, the exact phrasing is not available, but the high level of non responses suggests an open question. If this is a correct assumption, this may have affected the results. The main demands which could emerge from this question are:

Improved financial support

More breaks

More emotional support

More external care

Greater access to information and advice

Intentional or otherwise, it seems the construction of the study seriously downplays the importance of increasing financial support. The point is not necessarily that the report initiated by the Scottish Executive does not mention the financial, but that the questions they ask are fundamentally different from those asked by carer organisations with respect to questions on fuel poverty and cutting back on heating and so on. Despite the sheer size of the Care 21 study (Scottish Executive, 2006) with over 4000 carers surveyed, it is clear that this is far from “neutral”.

None of this, however, undermines the idea that many carers do also want more regular breaks. This is hardly surprising. In Scotland there are some 110, 000 carers who provide care for over 50 hours (Carers Scotland, 2012) and some 250, 000 who work and care at the same time (Carers Scotland, 2012) with evidence suggesting that carers retire some 8 years early on average (Carers UK, 2008a).

It is little surprise then that some  $\frac{3}{4}$  of carers say their health is deteriorating as a result of their caring role (Carers Scotland, 2012) with  $\frac{1}{2}$  who say they are suffering from depression (Community Care, 2001). Similarly, in the Care 21 report (Scottish

Executive, 2006), only 5% of carers said their health had not been affected as a result of their caring role with some 63% saying they felt depressed (p. 166).

Linked to this are the feelings of social isolation which can arise as a result of the caring role. The Report "Sick, Tired and Caring" (Carers Scotland, 2011, p. 4) states that:

- 81% cut back on leisure and hobbies
- 88% cut back on holidays
- 80% cut back on seeing friends

Although just a snapshot of the caring experience, all of this should give an adequate response to any complacency that may come with formal legal advances.

### ***6.8 Theorising "other" social accounts***

Before bringing this chapter to a close, it is worth spending some time outlining the thesis' perspective on "other" social accounts. This is carried out in order to better explain that whilst this chapter by its inclusion is deemed useful, the following chapters are vital in providing a more holistic understanding of the "why" of unpaid care.

Clearly, the other social accounts, whether that be the Care21 report or the numerous examples cited from Carers UK and Carers Scotland are very useful. For one thing, they highlight the difficulties carers face in a generalisable way with the sample size lending credibility to their findings. This gives it a great deal of weight in media discourse. A second element to this is that their documents are perhaps seen by some as part of a negotiation and discussion with policy makers. Of course, given that this emphasis can often be seen as non threatening to governments, it could be that this encourages greater media coverage. However, this is double edged if this is indeed the motivation taken by those conducting these social accounts. It seems possible that these accounts are attempts to prick the conscience of those in power, hoping to convince them with the force of moral and rational argument. There are tensions here of course. There is, for example a great deal of difference between a campaign like "Real Change, Not Short Change", which highlights the lack of financial support for carers and that of compiling a charter for carer rights, which can often lead to little practical change. The tension



between co-operation and confrontation with policy makers is one which this thesis has sought to draw out.

Given these introductory remarks, it is perhaps best to think of these attempts at social accounts as part of a “liberal humanist” framework. Here, text can stand alone without historical or contextual analysis. In this way, arguably disclosure can be seen as an end in itself. Showing up the poverty and suffering carers face is clearly an advantage given the misleading stream of information about benefit fraud and so on. However, it does little to give any indication of how the situation we find today can ever be any different. Without historical analysis, we run the risk of believing in an unchanging human nature. This is ironic given that without the NHS and feminist struggles, people may well have been rather indifferent to people spending large amounts of time looking after other family members. In this sense, we can begin to see how there is a historical specificity of what is deemed acceptable (Sherman, 1995). These arguments about human nature could also be seen to apply to the way the morality of government inaction is often a focus.

Although there is an important extent to which carers have the moral high ground, another purportedly ethical position would postulate that we should look after each other regardless of personal cost. Thus, the ethical onus can be shifted from the state to the individual. This is tied into to what extent care can be seen as a choice. Of course, if you cannot stand the thought of inadequate support for a family member, it is only a choice to the extent to which you put aside the likely consequences of not carrying out the caring role. If we consider how often people “choose” not to care for a friend or neighbour, the ideology of the family becomes more obviously apparent.

Added to this, there is also the notion presented by governments that there are only limited resources and so the needs of the carer are in conflict with the needs of the population as a whole since we need to ensure stability and growth. Whilst the problems with this argument are dealt with in Chapter 8, the point here is that these arguments can only be won politically and by challenging dominant assumptions, rather than assuming “right” and “wrong” will win the argument.

Anyone who supports carers, is a carer themselves or is part of a carer campaigning group would probably find it difficult to understand why this situation can be allowed to persist if ethical behaviour was a key consideration for policy makers. This leads to

a focus on pricking the conscience of policy makers and negative beliefs about human nature more generally when they fail to act. However, what is seen as ethical ultimately depends on whose side you're on. Therefore, supporting meaningful change for carers entails taking their side *against* the government. The suggestion here is that mobilising carers and the wider populous is key. Central to this is convincing people of the idea that we do have agency and it can be different in the future.

## **6.9 Summary**

The rejection of the term "informal" in reference to unpaid care reflects the contestation over the "informal" economy more broadly, showing how carers feel undervalued and underappreciated. However, outside of this, it should also be realised that many do not see themselves as carers, perhaps reflecting how "natural" this role can appear.

With respect to carer demographics, this chapter found that the overwhelming majority of care takes place for other family members and is more likely to be carried out by women. In addition, it seems that the largest group of carers (although not the majority) are aged 60 or over and are retired.

In terms of financial support available, the carers allowance is currently £55.55 (as at 24/1/2012) per week. Access to this depends on the person being cared for having access to certain benefits. The care must be carried out regularly (at least 35 hours per week) and the carer must not be in "gainful employment" (where they earn more than £100 per week after tax). Moreover, a carer may not get access to the cash payment if they receive any number of other benefits classes as income.

In addition, services available under free personal care for over 65s remain unclear and this is still a matter of legal wrangling between the Scottish Government and the local authorities.

Whilst technically, the legal situation is that no-one can assume family members can or will take on the caring role, the emphasis on minimising long term costs contradicts this and thus the family remains the default option.

There are also a number of social and financial impacts of the caring role including substantial lost earnings; more generalised financial harm as a result of continuing in

this role; as well as evidence of carers cutting back on food, heating and clothing. Despite this, the Care 21 Report seems to underplay the importance of increasing financial support. A large number of carers work at the same time and are often forced into early retirement as a result of their role. In addition, the majority state that their health is worsening as a result, with up to 63% saying they feel depressed. This is not helped by the fact that over 80% are cutting back on hobbies, holidays and seeing friends.

Much of the data gathered in previous carer research is useful in exposing the conditions that exist for unpaid carers. However, without explanation of why this happens and tactics for changing it that go beyond disclosure on its own the effect of these accounts will be limited.

This chapter has attempted to provide an introduction to some of the issues surrounding carers. Here we looked into existing legal rights to support and available financial help in terms of social security. Furthermore, some of the broader financial and social impacts of the caring role were outlined as well as the demographics of care in terms of the relationship to the person being cared for as well as the ages and gender of the carers carrying out this role. It then concluded with a brief discussion of the merits of previous social accounts of carers used in this chapter. The next chapter seeks to provide selected quotes and discussion from the carer interviews conducted as part of the social accounting conducted here.

## Chapter 7: Carer Interviews

This chapter will focus on the carer interviews conducted as part of the social accounting provided. This serves a number of functions.

Following on from the work in the previous chapter, these interviews serve partially as a reinforcement of the more numerical findings in other carer research on the problems carers face. Moreover, it seeks to look in more detail at what carers actually do. In giving a sense of the activities this might involve, it is believed that people will have a better understanding of the role. In some ways this is influenced by the work of Engels in his work "The Conditions of the Working Class in England". Although Engels account was more observation based, this text shows there is the potential for a rich Marxist tradition within social accounting which does not view social accounting as purely quantitative. It is believed that by showing carers "lived experience" (Sikka, 2000) we prevent people being dismissed as simply an expense to be minimised and instead see them as people deserving of life fit for a human being. In highlighting the carer role in their own words, the research may better relate to other carers thus allowing the development and appreciation of common experiences. In keeping with the Marxist approach adopted, this is important since it allows us to begin articulating the potential for unity in action as opposed to simply arguing that divergent needs of the person being cared for mean nothing could be done to provide greater support.

Another role the interviews play is in linking the experience of the carer with that of the person being cared for themselves. This allows us to put the prevalence of unpaid care and the dependence of many people being cared for on family in the wider context of disability discrimination outlined in more detail in Chapter 8.

In addition, the interviews allow for the possibility of gaining new insights on developments in unpaid care, like the increasing use of personalisation. Rather than resting on our laurels we must continually interrogate existing social relations. In appreciating how society is operating currently, we allow for the development of more suitable strategies for changing it. It also permits the uncovering of other findings that are perhaps not so prominent in other carer research. This is evidently the case when the prevalence of carer disability and lack of access to carers allowance are discussed.

With regard to the latter, research available up to that point had not made this argument strongly enough given its prevalence.

Another contribution of the interviews lies in unpicking the divergence between the superficial appearance of support (the formal legal position) and the reality of this in practice. In a very general sense, this is part and parcel of the Marxist method since if it was not the case that society appeared differently from how it actually was, the ideological cement that holds it together would quickly crumble. On the surface, it appears as though sufficient mechanisms of support are available. The interviews put lie to that perspective.

However, perhaps most important is the role of the interviews in helping to explain why care exists in its current form. Specifically, this look to why carers might continue to carry out this role despite the lack of support. This incorporates looking at attitudes towards their role and the role of the family; whether they believe they can change this situation and attitudes towards government and the state. It is believed that by better understanding carer perceptions and grievances we can better articulate changes which could mobilise carers on a campaigning basis. Or to put the same point another way, it is only with a sufficient level of consciousness that something is wrong with the current setup and that alternatives are possible that real change becomes more than an abstract hope.

This chapter will provide individual accounts from each carer interviewed by selecting key quotes which are believed to effectively highlight the caring role. It will become clear that the exact and specific nature of the caring role varies greatly dependent on the needs of the person receiving care as well as a much wider range of other influences. Although this variation potentially alters campaigning strategies, there is no need to deny the specific, since despite the diverse roles of care, the possibility remains of developing general themes which carers can unite around. Indeed, the existence of carers organisations is evidence of the need for general categorisation to build networks of support and solidarity. In this way, the interviews appreciate the inter-relationship between the specific and the general, rather than their separation. The remainder of this chapter will split up each individual interview into key areas in order to develop more general themes which are provided at the conclusion to this

chapter.<sup>19</sup> These individual accounts are coupled with a commentary to place the quotes in their wider context.

### **7.1 Interview 1**

The first interview was conducted with a man who cares for his elderly mother diagnosed with cancer. From the beginning, he mentioned the need for greater understanding of the caring role.

They won't be able to fathom the depths of what you have to do, what it entails. You have to be...a social worker, doctor, nurse, a friend, son, daughter, whatever. So you're a sort of Jack and Jill of all trades really.

The above quote points to the need for carers' voice to be heard and the frustration that this involves. Whilst there are clear limits to "disclosure" in its own right this is clearly an important part of mobilising popular consciousness against the existing treatment of carers and disabled people more generally.

Of course, one aspect of this is where this frustration is directed. Here, "they" could apply to other "non carers" or to government policy makers and so in this regard we must appreciate the social context in which care takes place. We are often provided with governmental campaigns which serve to associate distrust with benefit claimants or to provoke division between claimants and non claimants. For example, there was a campaign just after the 2008 crash which stated "If you break the law you should go to jail" which was directly aimed at benefit fraud. More recently, on Glasgow Subway, there have been posters displayed which use the play on words "Well-unfair" to describe the existing setup. Of course, this general atmosphere can feed into seeing "worthy carers" and "unworthy carers" as separate in terms of their entitlement to state support.

It is in this respect where an understanding or disclosure of the lived experience of carers' lives becomes most relevant. The following quote highlights the wide scope of what it means to be a carer and the inevitable strain this can place on mental health.

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<sup>19</sup> Names and places have been changed to ensure anonymity.

Due to the fact I've got Power of Attorney for mother's affairs...I deal with all the professors, the doctors, the mortgage people, the banks, all the legal side of things...

This example of what caring actually entails shows how people are pushed into situations where they take on serious amounts of responsibility for administrative functions which are often stressful enough in their own right when organising them for yourself. In this way, the bureaucratic dealings with different departments and various professionals is magnified for people who are simply trying to provide for and give support to others close to them.

Alongside this description of the enormity of the caring role, the ultimate idea of responsibility begs the question of a) to whom we are responsible and b) to whom responsibility falls for provision. In this respect, this carer understandably asks the question...

Are you a worker for the state as a carer on carers' allowance or a carer for the disabled?

This idea of whether individuals are responsible or the state is responsible is central to the idea of what kind of society we want to live in and to the prospects for future change. It seems that whilst not formally employed by the government, they serve a social function for the government and the goodwill they have is abused as a result of the carers' personal commitment to ensuring the person under their care has a decent standard of life.

The question then becomes without this contribution to a social good what would happen? The choices are either to properly fund health care and social services or to allow people to struggle by without support. Unfortunately, cuts in council funding of around 7% for the next few years (BBC, 2010) would seem to support the latter option.

Carers are understandably indignant about the gap between what they do and how they are supported and treated by the very state actors that rhetorically voice their appreciation in an increasingly hollow fashion.

Carers Allowance

A key part of this is in the financial support available in the form of carers allowance (CA). As highlighted in Chapter 6, CA is a benefit paid to people who care for 35 hours or more per week with the total amount totalling £55.55 for the same period. Despite the extremely modest amounts available, even this small amount can be denied.

Over the last three or four years I have lost my carers allowance due to the fact that I'm on long term incapacity benefit ... I've got the entitlement to carers allowance but I can't get the money...I've got underlying entitlement to carers allowance...

This shows that despite the formal appearance of welfare provision, this is often quite superficial. Coupled with this, the idea of the carer being disabled themselves is something that should be an obvious cause for concern and shows the desperation that many carers feel regarding a benefit system that does not appreciate the role they play. The carer then goes on to explain how even trying to "fend for yourself" is cynically used against you in assessments and by the welfare system more generally. In this case, the person being cared for is determined to vacuum the floors but even this causes problems when attempting to ask for support...

My mother's so adamant to hold onto this vestiges of independence that I'll vacuum the carpet or I'll do this but she'll bloody well through all her arguing and her pain she'll get up and with her two sticks in her hands she will put one stick down and have the one stick in her hand and bloody well push herself even if she's in agony she'll push herself to go and redo that again. Now in the beginning I used to tell these people, she's trying to keep...positive, that's part of keeping a positive mind trying to keep the vestiges of independence. What I found they used to start doing was using that against her. They would then make a determination by saying she can do it herself. 'Why do we need to put services in if she can do it herself?'

Of course, this creates a situation where you are penalised for being honest. It is seen as irrelevant how much pain is involved in a task but simply that the task can be carried out to show "capability". This provides a window into how the ideology of the "medical model" is utilised within the apparatus of the welfare state, as well as its monitoring and policing functions inherent to its very structures.



In addition, the idea of how the disabled person is “classified”, so to speak, as “deserving” or otherwise obviously has a massive impact on the carer. Less support means more pressure on the carer because the need still exists. It may even be the case that if the disabled person is disqualified from Disability Living Allowance, then the carer will also be disqualified from carer’s allowance - a double blow of injustice. A conversation this carer had with a Welfare Rights Officer of a prominent council in Scotland is revealing in respect to claiming benefits...

He turned round and said to me ...you never, never tell a social worker, care manager, a DWP, never tell them you have a good day or a bad day, you tell them the most negative, your worst case scenario. He said because this whole business is negatively based, it’s set up to say no to you, that’s why you always give them the worst case scenario. He said that’s just how it is. I said in effect you are actually lying sometimes. He said well, not lying, you are actually over-emphasising the truth...

This shows that talk of so called “cheats” is not separate from the conditions of desperation people are pushed into. It’s arguably far more dishonest for a government or local authority to pretend that there is no need yet this is precisely what happens. From this limited provision, we are then informed of the reality of applying for support with the assumption of the “guilty claimant” implicit throughout every page of the benefit forms.

They’ve just asked that question there and then seven questions later there’s another question related to the same question but they’ve worded it completed differently and, so I said, they’re trying to catch you out aren’t they?

Of course, it’s not just the demeaning nature of the forms repetitive questions but also the length and complexity that discourages potential claimants. Although the CA form itself is shorter (28 pages long at time of writing), the DLA often needed to get access to it is some 59 pages long. Clearly, how you articulate your access to a benefit can be as important as the material reality of the situation, thus echoing some of the arguments made later in Chapter 8 about how “middle class” people can ensure better access to public services and support (Hastings and Matthews, 2011).

What the legislation is telling us to do is basically lie, push the boat out and lie just to try and get some assistance or some help.

It seems the better an education and the more privileged a background, the better the chances of receiving support even for an equivalent situation.

The fact that so many people feel they are turned down for legitimate claims creates a situation where people start to point fingers at successful claimants who also have a need but may not seem to be “as deserving” as themselves. This scapegoating effect is not natural but is created by the very operations of the welfare state outlined in Chapter 5. It thus serves as a useful deflection from the abstention of government responsibility in this regard.

What makes matters worse, however, is that even when you *are* paid the CA amount and somehow manage to meet all the requirements its hardly a solution. The carer interviewed pointed out that for 35 or more hours per week, they were being paid £48.65<sup>20</sup> equating to £1.39 per hour assuming the best case scenario of the minimum 35 hours. This is substantially below the NMW equivalent which stood at £5.52 per hour<sup>21</sup>.

This shows the limits of accounting as a purely neutral set of numbers devoid of any social context. Depending on your interpretation, you could say carers are receiving £48.65 “for nothing” or you could show how people who are employed are deemed by the state to need a certain rate of pay to live (hence the NMW) and that carers are not to be given the same consideration. Of course, they are not formally workers employed by the government but regardless are surely entitled to support deemed sufficient to survive. This, of course, raises questions about the value of labour but more than this, how social activity more generally is valued (or otherwise) by the government. It is interesting, for example, that the qualifying number of hours needed per week is the often deemed “full time” employment within the public sector<sup>22</sup>. Personalisation, whereby people pay for their care on the “open market”, is an example of the commodification of care taking place under neoliberal reforms. The point here is whether care is being conducted with the aim of directly generating surplus value.

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<sup>20</sup> Correct amount at time of interview in 2007.

<sup>21</sup> As at 2007.

<sup>22</sup> Even if the reality of the working week is much greater than this for public sector workers, this is the formal legal position.

Clearly, paying a sufficient carers allowance is not commodification in this sense.<sup>23</sup> In any event, the government already pays a cash benefit for this role. The question then becomes whether or not this is sufficient.

### Assessment

As mentioned earlier, a large part of obtaining support in the first place is the “assessment of need” where a judgement is made on whether you are in need of support services.

Speaking on this, the carer describes his feelings of discomfort...

I didn't like this business of a stranger, who didn't know us from a bar of soap, to actually come and do an assessment.

Two things can be taken from this statement. Firstly, there is the impersonal nature of someone coming out to decide whether or not you are “worthy” or “a cheat” and in this way it must feel like a test of your “moral character” which is presumably quite insulting in itself. Secondly, this comment also begs the question of the appropriateness of a one off assessment to determine the disabled persons condition particularly given the good day / bad day bind mentioned earlier. Presumably this must feel like a cross examination and not a means of obtaining support. As a result of this it is little wonder that anger is often directed at the staff that carry out the assessments...

Now when these imbeciles, social workers, come into your house...they're there for half an hour to an hour...they don't know you from a bar of soap. They are coming in and they're having to make assumptions... or just using the policies and procedures from X City Council. I hate them with a passion because I firmly believe that before they walk in your front door [they know] the amount of money they've got to spend on that particular week or that particular day...they've made the decision long before they've come into my front door, as to what services you will get...they've already pre-determined before they've done the assessment...

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<sup>23</sup> For a more detailed discussion on the extent to which care more broadly is a commodity, please see Chapter 6 on the “political economy of carers”.

The fact that social workers appear as decision makers and often do not have time to carry out a more in depth assessment has the potential to leave the carer feeling that they have not been treated with sufficient respect, especially if the assessment deems that no or minimal support is required.

## Respite

Another crucial aspect of carer support is the ability to access breaks. Although the carer managed to get a fund of £200 to go to London, since he was unable to get respite for his mother, he couldn't actually leave. What is of particular note, however, is that this money was not granted through any government agency but instead through a carer charity funded by contributions. In this way, we see the retreat of the state from essential service provision. Even where there is supposed to be funds available from local councils problems begin to arise...

Ilene McGarrick at the Carers Office in the Scottish Executive or Scottish Government told me in no uncertain terms that the carers breaks, so much money was allocated to X Council for carers breaks. When I asked X Council why this money was not [ringfenced]... I am still waiting for an answer to this day.

In the absence of funds, councils seem to be moving money to other areas and this shows the limits of ringfencing in a similar way to the Conservative pledge to "ringfence" NHS spending. Of course, if carer breaks are ringfenced then this could just as easily mean a cut in social work departments, home helps or any other number of services of benefit to the carer. The idea of ringfencing seems to be an important part of the accounting apparatus which justifies different and often equally valid claims to financial resources and splits up different groups into competing categories. Of course, carer's breaks should be funded, but not at the expense of social work and other support for any other group who require health care. Ringfencing gives the appearance of a guarantee of provision which in practice seems to fail since the amount that is ringfenced in the first place is obviously crucial as is the ability of other essential and inter-related public services to be maintained. In any event, this also ignores how the ringfenced funds are actually used...

Returning to the issue of respite, in this instance the carers mother was entitled to 8 weeks respite *before* reaching pension age under the “Younger Persons Services” but after this the criteria changed and this person was then denied. Fortunately, in this instance, there was a successful appeal and 6 weeks were granted but it shows how much you need to do to get support.

## Employment

Another aspect which affects the financial situation of carers is found in their relationship to employment. Of course, it becomes difficult to work at the same time as taking on full time caring responsibilities. In this example, the carer lost some £23,000 per year. This tension between trying to maintain work alongside caring is clearly expressed.

The hotel industry is split shifts, long hours and there would just be no way that I would be able to cope. I did take a job for a year and it didn't work...I just couldn't work because trying to get time off to do things with Mum...she's had a number of falls, she's had a hip replacement done, various...problems. She can't eat very well ...so because of all her medical problems ... it's not possible at all.

The feeling of individual responsibility coupled with the physical impossibility of being in two places at once creates a situation where often carers try to do both things – to continue working and caring. This often leads to an inevitable collapse in the situation.

In this case, the carer also had to decline other offers of full time employment as a direct result of the caring role.

The sentiments above show the problem with the formal rights of carers as compared to the reality of these rights in practice. The question should be asked if this carer and many others are materially disadvantaged as a result of their caring role. If so, it arguably amounts to discrimination since they have given up opportunities where another “legal citizen” would not.

In fact, this idea was explicitly recognised as the carer mentioned the case of Coleman who successfully won a case claiming discrimination in employment (BBC, 2008; Carvel, 2008). This shows that whilst formally carers are entitled to flexible working patterns to allow them to continue in their caring role, in practice this is simply not achieved and that you only get the legal rights you are willing to struggle for.

## Social and financial impact

Perhaps, however, the most troubling thing for carers is the impact on their social life. Describing his caring responsibilities as equivalent to having “no social life whatsoever”, it is highlighted that there are drawbacks even when you do manage to get an opportunity to go out.

You can't switch off ... it's 24/7. You might be in a pub or you might be invited out for a meal. I was invited out for a meal about a month ago, and...still at the back of my mind, I'm sitting there having a meal and I am still thinking to myself is she alright...

This shows that there is no clear dividing line between time spent caring and time spent socially. If the caring needs are not being met by someone else the worry (and often guilt) affects the limited social contact that does exist.

Rugby, collecting antiques and attending concerts are all things that have been sacrificed in this case due to the caring role as well as eating out which is prohibitively expensive given the lack of financial support carers receive. Again, the issue of employment is important here since much of the social interaction available before was through the workplace and this shows that the loss here is not a purely financial one.

That being said, the social and financial impacts are clearly linked.

Describing his thoughts on the financial situation, it is likened to...

...just trying to keep the head above water, the wolf from the door and hook or by crook...work it out. It's like a drug addict where you are pushed to find your next £100.00 for your fix...In my case it's not the fix but to...pay the bills...

Clearly this cheque to cheque existence has other social consequences – this is about the very quality of life that a whole layer of society endures.

There's times when she'll just burst into tears in front of me and, now and again, I'll burst into tears on my way out the door or go upstairs and burst into tears.

### Carer disability

What makes this caring role all the more difficult is the often poor condition of the carer themselves. In this instance a diabetic with chronic migraines, sleep apnea and a recent heart attack is caring for an elderly woman with cancer. The point here is that the carer themselves often needs care and support and there is the evident possibility that caring itself without adequate support results in an increased likelihood of physical and / or mental disability for the carer themselves. It may well be that refusing to improve this situation is a very short term outlook even from a government budgeting perspective. However, as explained earlier in the political economy of carers section in chapter 8, it is not quite this simple. Regardless, of the likelihood of having long term positive financial implications (which could, in theory, be reinvested into further improvements in the health service), what is of central importance is that a policy of prevention would certainly improve the quality of life of the carer themselves and that of the disabled person being cared for.

### "Goodwill hunted"

In fact, often even recognising their own disability can be a source of guilt.

I love the job in the sense that, I'm always moaning but I think it's great what I am doing while I can for my Mum. I feel sometimes I don't do enough for her because I am not well now myself.

What is of note here is that, like anyone who carries out any unpaid or voluntary work, the ethos behind it is often a very positive one, namely a feeling of social worth for helping others in need. It is part of a positive social fabric that still exists despite the hangover from Thatcherism. However, in a similar way to the voluntary sector being abused in terms of replacing paid employment in the public sector with free and often dedicated but relatively untrained, temporary labour, carers are asked to "focus on the positives" of the caring experience.

This goodwill is often ruthlessly abused and in the case of carers is linked very closely to the idea of the nuclear family and ideas of individual responsibility as outlined in chapter 8 on the family. Commenting on the alternatives available to this particular carer we are informed...

It was my conscious decision to make irrespective of the consequences. I just felt it was...not just *my duty as a son*, but...the right thing to do because of the lack of services out there.

Of course, there is a link between the feeling of obligation and the lack of services. The more services are undermined, the greater these services fall on the shoulders of individual households, who are then “responsible” for themselves. In this way, the retreat of the state is justified because after all who wouldn’t look after their sick family? In reality, there was very little choice other than to allow the caring needs to go unmet.

#### Government

This idea, however, is hardly lost on carers.

Gordon Brown and all his cronies, social work department, local authorities...what they do is they use and abuse us and they don’t give a shit. We’re expendable. They know we’re there and they know that we will not strike. They know that we will not give up on our loved ones and they actually abuse that. It’s similar to emotional blackmail...they actually blackmail us at government level and local authority level. They know that Joe’s there or Danny’s there [so] you wont see his mother suffering...

This atomisation of making a public service a “familial responsibility” prevents economic leverage of a workforce from being exerted to push back against the worst excesses of cuts and the withdrawal of service provision. The idea that because x, y or z is there and hence the needs are met is an example of being shown in practice that the ultimate responsibility is assumed to lie with the family. Thus, there is a contradiction between the formal legal position outlined in Chapter 6 and its realisation in practice.



Aside from the short term social and financial outlook mentioned earlier that this approach implies, it also fails to ask what would happen if the carer wasn't there or if they developed a need themselves rendering them unable to continue in their current caring role.

With respect to government decision making, the Care 21 report (Scottish Executive, 2006) is also criticised by the carer since all the Scottish government can apparently do is make Westminster "aware of the findings". In this way, devolution creates a situation where both Scottish and UK governments can blame each other for a situation where both could do a great deal more to help carers. This idea of limited accountability is clearly a point worthy of discussion since the axe of cuts is devolved first from UK to Scotland and then right down to local authority level (for a similar idea, see White, 2010).

### Personalisation

This possibility for improvements would need to take account of different carer needs.

Every individual in every caring circumstance is different to anybody else's. We are all unique. We have all got our own set of circumstances.

What is concerning about this is not the legitimate point in itself but the way it is being used to justify the marketisation of care into individual budgets and increased competition for services.<sup>24</sup>

### Improvements

This poses the question of what can be done. This carer put forward the idea of a £200 per week non means tested flat rate with additional help available for TV license and car tax. The financial rationale is compelling.

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<sup>24</sup> See chapter 8 for further details and Interviews 2 and 4 for a great explanation of how this works in practice.

If my mother was in a home it would be £700.00 - £800.00 a week to look after her...but that doesn't seem to come into the equation when working out the pros and cons of the carer role or the government's strategy for carers.

In a similar way to the comparison of CA to the NMW, this suggestion exposes potential financial inconsistencies though use of an equivalent costing system. This does beg the question of what relationship the price of a care home actually has to the service being provided. However, the council presumably assume that people will continue in their caring role when it comes to cost considerations, even if legally they are not allowed to assume this in the development of the care packages.

One of the things that makes this situation all the more frustrating is the gap between the people demanding more support and the government decision makers who have the final say. In the wake of the expenses scandal, the sentiment below seems particularly apt.

All these people in Westminster have got enough money to pay for services...so I want a liveable wage or allowance that's not means tested.

In the same way that everyone has the "choice" to stay at the Ritz, everyone has the "choice" to access additional support. The serious limitations of orthodox economic liberalism are again highlighted.

One potential avenue for further exploration is the comparison to full time work. In trying to claim working tax credit, the carer was informed that he was not eligible since he did not get paid by an employer. The idea here is that carers have most or all of the roles and responsibilities of a paid worker employed by the state but without the same rights to financial recompense or the opportunity to collectively withdraw labour to defend their conditions and that of the people requiring support.

Engagement and disclosure

The lack of any real improvements in support often leads to frustration and a deep cynicism of government research.

The government had their so called carer strategy in Tony Blair's time and all I hear about, or I see on the internet is this review, that review, this white paper, this consultation document. [They] keep on talking about the same stories over and over and over again and they're just not putting their money where their mouth is at the end of the day...Every part of society has taken strike action, the fire department, the police, nursing, doctors etc. So what about carers? The role in Scotland is negative. People are ignorant when I say I'm a carer for my disabled mother. Do they really understand what that means?

With respect to government inaction, he continues...

*They all know what we're going through and yet they procrastinate and procrastinate and procrastinate and procrastinate and, they don't want to put their money where their mouth is.*

This statement strongly echoes the critique provided of disclosure research outlined in the literature review earlier. Put simply, disclosure on its own is not enough. From these two quotes we can see a strong belief that whilst the government is fully aware of carers' lives, the general public still remains largely unaware unless they have a direct experience or connection.

It is little surprise that this disillusionment with government action as compared to rhetoric, can lead to sense of fatalistic despair with government consultation.

Will it ever change? No, it'll just get worse

However, despite this belief it would be misleading to imagine this means passively accepting the existing setup. The carer explains that the problems and barriers that remain "just makes you fight harder" – a remarkable yet essential attitude if effective action is to be taken to prevent government cutbacks on the most vulnerable.

## **7.2 Interview 2**

The second interview is conducted with a single mother who cares for her 14 year old son who has Aespergers syndrome.

In a similar way to the previous carer, the demanding nature of the role was explained.

No other job that you ever do...you're not expected to do it 24/7 every week of the year and expected to do it without holidays and breaks and yet...that's what carers are doing all the time.

Although childcare is similar in the sense that it is ignored as not being part of the "formal economy", the point here is that compared to paid work there are no holidays since the care need is still there and needs to be met.

This constant pressure obviously takes its toll and has its own particular dynamic given the demanding role of being a single parent, carer or otherwise. In this respect, an informal parent's support group provides a valuable social support system and it is vital to recognise the different types of carer and how this affects their caring role.

#### Carers Allowance

On attempting to get support for her caring role, she describes the experience as an "absolute nightmare". On the issue of carers allowance we are informed...

...I have an underlying entitlement to carers allowance but it's outweighed by the incapacity benefit so I don't actually get it.

Again this raises the issue of carer disability but the apparent regularity of "underlying entitlement" should be examined as it shows a clear discrepancy between formal entitlement and the reality. One of the issues that this idea of underlying entitlement sheds light upon is the unnecessary complexity of the benefits system itself. Speaking of the last time benefits were explained to her by a support worker, this carer describes her frustration at not being able to remember it.

It feels like you're fire fighting the whole time. You are constantly under pressure ...handling the latest issue and certainly I've found that my memory has become very poor, I panic easily, I'm very anxious about things and I think part of what happens is that you only take in what you need right at that moment...I know I can remember very clearly having a discussion with the previous support worker one night and she was doing a review with everybody that was in the group of things that we should be aware of...like benefits. She said I told you about this last year and every one of us sat there and completely denied it. Not one of us remembered that she had told us and it wasn't that she hadn't told us...So that's an issue and our benefits are really very complex.

This stress involved in the caring role makes it all the more difficult to deal with an increasingly complex benefits system.

I'm looking at going back to university and trying to look at what the impact of that will be on our benefits and it's really scary because I can't get answers from because if you go to the disability section they only know about the disability side of it...You go to the finance department, they don't know about the disability side, and it feels like nobody can give you the full picture.

This uncertainty obviously feeds into a mentality of protecting the little you have, so instead of asking questions it is easy to deduce that it may be easier to just say nothing despite the impact this has on your life choices. In addition, this shows the effect of competition, since different bureaucratic centres are competing for greater control and access to resources.

You're very scared because if you go there even the fact that you're asking a question might trigger all sorts of reviews of how well you are and whether you're fit to be working and you feel completely trapped.

Of course, even if you manage to obtain the carers allowance this does not seem sufficient to many carers.

When you look at what people do for the amount...it really is just wicked and the fact that carers allowance is only given as one benefit regardless of how many people somebody can be looking after...The amount of hours that you're supposed to be working for that amount of money...

This comment is indicative of the lack of value placed on the so called "informal economy" more generally and the resentment this causes. The above quotes together show that a formal entitlement is often unmet; that there are problems in getting clear answers about what is available; fears about even asking questions in the first place finished off with such limited financial support that it probably doesn't seem worthwhile anyway.

## Respite

Each year up till now Andy has been given a five day break at an activity centre especially for special needs kids and he's gone on that each summer up until now.

This year I rang up and asked the social worker if there was anything going to happen. She said 'No, we've had a change of policy - we're not doing that this year'. So that's my only holiday, that's my only time where I get more than a day away from Andy just gone. Nobody says why...she's so busy at the moment, the social worker, that I haven't wanted to...bring her over and talk to her about it and I know that's genuine. At the same time that is the only time of the year that I get a break...a couple of days to myself when I can just think of my own things and it's gone. That's at a time when everybody's announcing that we're supposed to be getting more respite for carers and it just goes and you don't know why...you've got no control over it.

This shows how even small breaks that give carers a chance to relax for a limited time can be discontinued at a moments notice and without any explanation. The carer points out the irony of the timing. Also of note is the idea of legal and financial barriers to support that is supposed to exist. Moreover, this lack of control belies government rhetoric about being equal partners in care and so on since the key economic decisions on which support mechanisms are based are not subject to any genuine democratic control.

In any event, it is clear given the nature of the caring role that whilst breaks can be a vital means of support for carers, they still go back to the same stressful and demanding role afterwards.

### Employment

One of the key problems for single mothers is the double burden of work and parenting with all the other household chores that involves. In this instance, however, this tension is magnified because of the caring aspect. Decisions which are already difficult for any single parent are thus intensified.

I was working previously. I have been back to work since Andy's diagnosis. I was in a part-time job three days a week because I didn't feel I could take on any more than that but I found it very difficult. I felt very torn between being very clear in my mind that his needs were the top priority and that whatever I did mustn't impact on him...

In this way we see a carer who is trying to do the “right thing” but who becomes increasingly unable to carry on in the same way.

I felt constantly pulled and torn in my loyalties to doing a decent job and being responsible to my employer and my key responsibility which was being...loyal and supportive to him. I just found I was just constantly being stretched further and further and in the end I just found I couldn't...keep it going and it all broke down.

Even the idea of finding childcare (difficult and expensive enough in its own right) becomes more of a challenge.

If they have trouble socialising and they have trouble being with other kids and they don't like noisy environments, trying to find childcare or anything that they are willing to do is very, very difficult.

Coupled with this, even getting time off work is a serious challenge. This carer who worked for the NHS stated the impact of the carers' policy.

They do have a carers policy, a parents policy as well, so there were policies in place but it still impacts because it's unpaid time off that you are taking and there is only so much time that you can take.

The avenues available to continue work and care thus become narrower and narrower and it is little wonder that so many carers end up leaving employment.

#### Social and financial impact

Another vital aspect of the caring role is the social consequences while the carer is often trying to be as understanding of the disabled persons wishes as possible.

I find it very difficult to get out and do very much to be honest and this is one of the worst times of the year because Andy really doesn't want to do anything. I told you that we moved here after Andy had his diagnosis and we didn't know anybody over here at all. We'd moved over from Scottish CityA when we came over here and we didn't really know anybody over here at all.

In addition, other people's perception or misunderstanding of disability itself has serious consequences.

If there are any issues around behaviour you become unacceptable in a lot of places. Your children don't get invited out to parties, other people won't come to you. You just become isolated. You're disapproved of...and it doesn't matter, even if people know...there is disability in there, because your child isn't behaving in appropriate ways, it's easier not to invite somebody. And I'm not saying that with bitterness it's just the way that it is. But over time you become lonely and isolated.

With already limited social outlets, this shows how disability itself is often viewed. People may voice defence of disabled people's rights in the abstract but the portrayal of disabled people as fundamentally different from other people means that some may feel uncomfortable in their presence. This obviously has a knock on effect on the carer as well as both may well feel like social outcasts.

A related point is how the financial situation causes additional mental strain.

I suppose we exist on a day-to-day basis but the thought of anything going wrong is very frightening. I'm driving an old car that's getting older every year. I have no hope on benefits of even getting a loan to buy another car and I would find it very difficult. Neither of us come into the category that would qualify us for the mobility scheme for cars. I would find it very difficult to manage without the car and each year that goes by I'm watching it getting older and rustier and thinking what's going to happen...to us if we lose that car. It's those sort of things...day-to-day we exist because...all we are doing is living at home and not using very much. But if anything breaks down, if the computer goes, if the car goes, if the house needs repairs or something like that, it's those sort of things that are the real worries... I've no provision whatsoever for retirement. All our savings are gone. So it's really worrying and everything feels like it's on a knife edge because you never know what's going to happen. You don't know if the benefits are going to change. Nothing feels like it's yours. It can be given. It can be taken away. It can change, and if you put a foot wrong it could all collapse.

Again, this idea of the insecurity of living on benefits and how little control you have over your financial situation poses serious problems.

Nuclear family



Already suffering from depression, one of the things that made the carer's role more difficult was the lack of anyone else that could offer support. When asked if there were any alternatives...

Oh, absolutely none, no. I mean I am his mother. There's no way I would have contemplated anything else anyway. But the difficulty for me is that it has been absolutely full on as there's been nobody else. There are no grandparents, no aunts or uncles or anything like that who can help to share the role. So it's been entirely down to me right from when he was tiny.

What is interesting here is that this point was made in response to a question about alternatives available. This shows how pervasive the idea of the family as the primary form of support has become. In addition, it seems clear that just because you are a parent, this does not equip you to cope by yourself with physical and / or mental disability! There is no reason why someone who ends up providing a caring role would necessarily have any better idea than the next person about the nature of disability and may well carry the same problematic ideas outlined in chapter 8 regarding the "medical model" approach.

Similarly, when asked about available support, the main mechanism seems to be in the form of a carer's centre and the informal support therein. The state is only brought into question when financial support is mentioned and this clearly limits peoples perception about what help *could* be available.

#### Personalisation

A new scheme known as direct payments was touted as an effective way of dealing with the many difficulties carers face, widely heralded as allowing flexibility and choice, language that is all too familiar within the debates about the NHS...

The carer describes how the scheme works...

For some time there has been drive through the whole country to have more personalised care and direct payments were brought in. [This] is basically giving individuals their own budgets so the scheme now is that I get an amount of money, the social work assesses us as a family, for how much care we should be getting and that amount of money is calculated and paid into a separate bank account.

Understandably, many people see this as a preferential alternative to the existing setup. The main problem with the previous setup is clearly outlined.

It was very rigid and effectively you were being told when you can have cover rather than saying I want it this time this week and maybe at a different time the next week, or I want to save some of it up or so on.

This idea is further emphasised at other points throughout the interview.

I found it very difficult when we were going through agencies and the social work were paying directly because I was being told what hours I could have, when they were available from the agency. If you weren't able to take up those hours or if their carer was unavailable for any reason you simply lost the care so I agreed to go on to direct payments. But it's a real struggle trying to find suitable people.

That being said, there are numerous practical problems outlined with the scheme and much of this fits with the critique of what is effectively the marketisation of care.

I've just lost somebody and it was too near the summer holidays to get somebody else on board...so we've effectively got nothing through the summer holidays this year.

In a similar manner, we are informed...

Every time you lose your care worker or if you've got several people, it's an ongoing thing because people who are doing that sort of work don't tend to last very long.

Here, we begin to see that flexibility in practice often means that provision is not granted and long term staff are replaced with workers who are often temporary. Connected to this is also the stress involved in the carer administering the new scheme as the following quotes demonstrate:

You are responsible yourself for having to advertise and to find your own people and so on and it's really difficult. Keeping hold of them is really difficult but it's the way forward.

I have to make three monthly returns to the finance department of the Council to prove what I am doing with it and it is worrying. It's a whole additional layer of worry. Instead of alleviating worry and concern it's actually adding to it.

Additionally, there is a social aspect included in the relationship between the ever changing carer and the disabled person themselves.

As far as my son is concerned these are friends for him. How many people can I keep introducing him to and sort of palming him off with and saying well this is going to be your new friend now.

The future prospects for the scheme are also questioned as a result of the competition inherent within its application.

It's going to become more and more difficult because more and more people as they go down that route are going to be competing with each other for limited amounts of time to take on care workers and there aren't going to be the people around to do it.

### **7.3 Interview 3**

#### Role of carer

Our next interview took place with a woman who cares for her son who suffers from schizophrenia as well as having numerous physical difficulties as well.

In describing her role, the carer made mention of her son staying in his own flat and how this amounted to her effectively "maintaining two houses". The carer explains the necessity of her caring role.

In the early years I really believe, in fact I'm certain, that if I didn't put the work in then he would never have got back to a level where he's still ill but he can be in the community. If he doesn't get that level, he can't maintain it, and the services don't put in the support that's needed.

During the interview, it was also discovered that the carer's husband is disabled with arthritis and a spine complaint amidst the possible onset of depression. This amounts to effectively caring for two people.

### Perceptions

It seems important to highlight the details of this experience given the way that carers are often perceived.

I think people sometimes don't even want you to speak about it, which isn't good for carers. They can't speak to the services because they don't want to listen to them and they just see them as the angry carer.

### Family

One of the things that can possibly add to the frustration of the caring role itself is the idealisation of the family as sufficiently capable of "dealing with its own problems" seen as distinct from those of society as a whole.

We're getting older and his Dad's disabled so we're trying to get him as independent as possible. The longer it goes on the more you're aware 'I'm not going to live for ever and he's going to be left'.

This seems to show that the family support often require support themselves and so this places additional strain on the situation. However, even if her husband was not disabled in this case, the physical and mental strain means this situation may not be sustainable. Indeed, as alluded to in chapter 6, this concept of sustainability is key to local authority decisions about care provision. Therefore, is it useful to briefly consider this in light of the growth in academic discussion about "resilience". Although often posed specifically in relation to poverty, Oxfam, for example, make reference to how "poverty reduction and resilience can be achieved" (Oxfam, 2011, p. 8). However, there are difficulties with the concept. It has been noted, for example, that "people can be very resilient and very unwell" (Institute of Development Studies, 2012). It also seems pertinent to ask at what point resilience is broken? How bad do things have to be before you are classed as "not resilient"? In the carer context therefore, we can ask to what extent carers being given the very basic minimum to continue in their role is actually advantageous to their long term quality of life. In a very limited sense, it may be "sustainable", but not much of a life.

In addition, the idea of relying on the family always poses the question of what will happen if people did or could not take on the caring role. The idea of “choice” to become a carer is only true to the extent you are willing to allow the chance that the care needs go unmet.

Of course, caring is not for the light hearted and some people quite understandably do not feel they can cope with this.

In explaining support from friends and family, the carer points out the difficulties specific to her role caring for someone with mental health problems.

You don't get the same support from family and friends. It's everything else that comes along with this illness. You're left isolated. You don't get family and friends phoning you up and saying “how's Ben?” And they feel it as well, so you become... more isolated.

It is entirely possible the widespread perception of mental health as “not a real problem” leads to a situation of stigmatisation which has a knock on effect in terms of networks of support from individuals. In any event, the myth that family and friends can and always will step in on a consistent basis to replace diminishing services is largely discredited.

## Benefits

One of the main problems, therefore, is the lack of state support.

Long term carers are frightened to complain or to kick up because of past experiences and because they're frightened to lose the wee bit of support they've got.

Here, similar to previous interviews the prevalence of fear as a disciplining mechanism is again outlined. This means that although formal systems of access to information may to some extent exist, they are often not used for fear of possible repercussions.

Additionally, it also makes it far more difficult to become involved in campaigns to improve the situation or even to use official channels to complain since you feel vulnerable.

The carer also outlined the abuse of hope used by government in the idea of “Recovery”...

I think they have to measure recovery and people can get well, or they can get well enough for them to be able to live as independently as possible, but it worries me that the government are using this recovery into ‘well let’s get people off benefits’.

This shows the difficulties in trying to focus on outcomes in this way, especially given the alleged desire for deficit reduction currently underway where state expenditure is a primary focus. Unfortunately, this idea may ignore the fact that a full “recovery” is not always possible anyway with a better focus being on the continuous level of service required to meet people’s needs.

#### Carers Allowance

Of course, as has been discussed in previous interviews, one of the problems is the amount of benefit available itself in the form of carers allowance. As other carers also noted, the amount remains the same regardless of the number of people you care for. In this way, therefore, it is also crucially about a lack of recognition albeit as reflected through inadequate financial support.

#### Assessment

In terms of support available more generally there are also serious problems with how care needs are assessed. The carer explains...

His community care assessment consisted of a senior OT going out with a bottle of Irn Bru, a pan loaf and a tin of spaghetti hoops and if he could manage to heat up the spaghetti hoops and pour the Irn Bru then they said he can look after himself. That’s not ... He doesn’t have the motivation. He’s very variable. At times he’s really anxious. He also has...serious physical problems. He’s lost five stone...since May because he’s been on high doses of long term medication that’s affected his stomach. It’s really like prompting him to wash, doing his washing, going with him for his messages...everything really. He does have some good days. It’s not to say that every day is a bad day but if that support isn’t there then he goes down hill very fast and he wouldn’t think to make something to eat. I mean he would try to make something to eat but he wouldn’t clean up... it could

be quite dangerous if his concentration isn't there, burning himself...or he wouldn't wash. He's been on high doses of Clozapine so he over-salivates quite badly. He's not able to change a bed and make a bed but according to the services that's not necessary. He will probably be out of hospital next week. He's had a suicide attempt two weeks ago. He took 35 Clozapine and he didn't call for help. The only reason he's alive is because he had the stomach problem so he didn't absorb the Clozapine or he wouldn't have been here. So he'll be back out next week and I'll then have to monitor the medication as well. You've got to go in every day and give him his tablets and check.

This shows clearly the inadequacy of the assessment in terms of reflecting the actual care needs. One of the things that is often discussed when people are filling out disability living allowance forms is the variability of people's condition, which makes it difficult to make a hard and fast "objective" statement about the condition in the terms they want (i.e. how far can you walk in metres?)<sup>25</sup>. The extremity of this situation is obviously highlighted with respect to the attempted suicide.

Another difficulty lies in the application in practice i.e. what happens after the assessment is carried out even where care needs are deemed to exist.

Maybe 10 years ago I got one done and I was told they would need three or four people coming in to do what I was doing, and that was in a day. And I never got anything...never got offered a single bit of support in all these years, nothing. I got one done this year and that was really to flag up I don't expect anything...You become so disillusioned. I really in reality didn't expect anything...but I wanted to flag up the unmet needs. The new plan is we'll give all this money to the Princess Royal Trust and they'll bring in...somebody there who can do the forms. It's not about doing the forms. Carers can do the forms. They assume that if you're a carer you suddenly become an expert. Organisations specific to mental illness could fill in the form but they don't do anything with the forms. So these forms will just sit there. It's a total and utter waste of money. They could spend the money in a lot better ways than filling in a form when nothing is going to happen...and carers know that.

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<sup>25</sup> The idea of having a "good day" can seriously undermine your claim as was pointed out in Interview 1.

Here, we can see that even though the carer was deemed to carry out the work of four people, no additional support was granted. Contrary to being of benefit to claimants it seems the assessment can be a rather demeaning waste of time for the staff, the carer and the person being cared for.

Additionally, the idea of the perception of carers is also highlighted. Whilst you can never artificially separate the carer and the person being cared for in terms of appreciating the dynamics of the situation, it seems people often assume carers are unable to cope themselves almost by association. A number of people within the caring community have mentioned this as a particularly insulting and patronising attitude. This, of course, may be combined with a more general stereotyping of older people who are often assumed to be “senile” or “approaching senility”.

### Employment

Another vital aspect of this is that in the absence of support, your employment options become increasingly limited. The carer has already had to reduce her hours.

I've already clipped down a day and I'm going to need to clip down more. I'll probably need to be down fully to part time next year because my husband was helping me but he's not able now.

Clearly, the whole situation is incredibly unstable. One change in family circumstances (in this case the onset of the husband's disability) can throw everything off, with all the financial implications this entails.

### Support

From the interview it seems that one of the main vehicles that aids carers in coping with some of these difficulties is often found via less formal means. This may often be through the voluntary sector in the form of different carer centres. Crucially, one of the key things here is the social support network as the centre becomes a crucial way of obtaining non judgemental support which may not be available from government departments who are increasingly pressured to minimise benefit claims.

This social aspect is also a key part of why carers are demanding better respite (breaks from caring). The carer explains that “50% of what they get out of that weekend is a break in isolation, meeting others, and the social part of it.” In this way, we can see this



respite, like the carer centre, as a vehicle for attempting to overcome the isolation of caring for someone by yourself. Even where these schemes exist, the problem is their often fleeting nature. Indeed, a number of carers mentioned the recent ending of these schemes in their area. Therefore, it is questionable at best to what extent the cuts in council funding will allow even such limited breaks and support to continue. Whilst the carer recognises the small pockets of respite do exist they are very limited and it is not something she has ever been offered in her council area.

## Mental Health

One of the key things that runs through all of this is the prospect of deteriorating mental health given the demanding nature of the caring role. The carer explains very clearly the expectation placed on the family.

Sometimes carers will think they're a terrible person because they've maybe got to the stage where things are so bad that they think 'the only option is to kill myself and kill my relative.' That sounds ridiculous but it's actually very common... I don't think anybody that I know is intending on doing that but I think in this day and age where people feel that's their only option it's a disgrace.

The weight of expectation placed on people within the family unit thus has a corrosive impact. The consequence of this is that when they cannot meet the idealisation of the family provided in dominant ideology, they feel personally guilty and assume responsibility. This expectation could thus be regarded as a form of "symbolic violence" as people are being pushed into desperate situations. Unlike a workplace where you have co workers in your immediate vicinity to get support and advice, here the burden falls almost exclusively on the individual. Although sometimes the carer and the person being cared for would rather the caring needs are met "within the family", the above shows that it may well be the case that this is not the most effective way of meeting the needs of the person involved. It also risks the physical and mental deterioration of the carer themselves as they struggle to cope. Therefore, talking about cases where people do resort to the desperate actions mentioned above in terms of problems with individuals divorced from social context clearly misses the point.<sup>26</sup> In addition, the personal ties make the whole process a lot more difficult since any level of emotional distance is largely unrealistic.

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<sup>26</sup> For another example of this please see Interview 5.

## Carer Disability

The idea of the carers own health deteriorating is clearly shown in this instance.

I just can't keep going. It's already had a big impact on my health over the years. Over 15 years I've had ulcer operations, you name it.

The additional problem here is how often carers, through focusing on the person they care for, ignore or delay dealing with their own health problems. If you go to hospital, what will happen? In this way, there is often a (justified) fear of raising your own health issues which can inevitably build up for a more dramatic breakdown further down the line.

## Improvements

This idea of the long term impact of care is important when considering possible improvements that could be made.

I think the training, practical and emotional support for carers in getting the help in early so that carers are aware that they need to be careful for their physical and mental health. I say to carers and I know I don't take my own advice a lot of the time, 'if you want to go the long haul then you need to take care of yourself'.

Obviously, this suggestion cannot be understood outside the context of weak provision of support from the state itself. It shows how long term carers have realised that without significant change in support they will either be significantly harmed or simply be unable to continue in their caring role. In either case they will very likely jeopardise their own health. Indeed, this recognition is likely contained within local authority costings of care. From a purely economic standpoint, however, they are unlikely to account for the health of the carer so long as the role continues to be fulfilled.

Another suggestion for improvement came from a perceived misunderstanding on behalf of those responsible for statutory service provision.

I think the statutory services don't get it... I think they can't perceive what it's like for carers so I think a lot of it they miss. I think a lot of training [with] professionals and carers delivering the training, and not these clever people. I call them clever...I say to them [the health board] 'You have these four people that go to everything that really don't know any carers, or know what it's actually

like'. They go to all these meetings and represent carers but you need to get out there and be saying to carers 'what's it like, what can be improved?'

This quote certainly chimes with my own experience in researching the impact of the caring role. An allegedly public meeting on "carer strategy" from Glasgow City Council open to "anyone with an interest" in care was held on Friday 19<sup>th</sup> September, 2008 at the Pond Hotel on Great Western Road. It seemed various officials and management types were present but relatively few actual carers (if any). On entering, I was immediately quizzed on why I was there and then continuously harassed to give names and details of who informed me of the meeting. As it happens, this paranoia was unjustified since information on the meeting was publicly available. A formal "consultation" seemed to have no interest in "consulting" anyone, at least, not on grounds other than cost management...

Another suggestion for possible improvements was that carers be given a working tax credit to allow a reduction in working hours to maintain work and care, or, at least, make this more of a tangible possibility. Whilst this would certainly start to deal with the problem of the work/care conflict, we need to look at how low wages contribute to the problem. It is also true that sometimes the caring role is so intense that it would not be possible to work at all.

However, the suggestion is a reflection of the need for dramatic changes to available support for carers and the lack of real control over their own lives exacerbated by helping someone close to them.

Another important consideration is the myriad of additional costs that caring entails. For example, the carer explains...

If he's agitated he won't go on a bus, so you need a car. You need the car to get him out and about.

Given that this is primarily (although not exclusively) a mental health issue, this shows that this is not just an issue for caring for someone with physical difficulties. In this way, the limited and poor public transport, often totally unsuitable for disabled people, means a car, with all the required expense becomes a must. This problem is further compounded if you care for more than one person.

Some days my husband is physically...really bad. He also has angina and a bad heart so I can be running between hospitals.

This idea is also clearly expressed in Interview 1. It seems in this case as in so many others, the more you try to help others the more you are financially penalised for it.

#### Personalisation

One of the tactics put forward by the government is to bring in a system called direct payments. However, as explained previously, there are clear problems arising from this.

It was quite a lot to take on board. I think you need to be quite well to work it out, then you need to get somebody to do finances... for me as well being in the system [as a mental health worker] I couldn't work it out.

As in Interview 2, we can see how this process can actually add stress to the existing problems. Under the guise of "freedom" and "choice", what is actually happening is the reduction of service provision and the replacement of unionised and trained labour.

#### Engagement

Given the lack of real progress on these issues it is little wonder some carers feel that change is very unlikely.

It sounds quite bad but I actually believe now that help's never going to come. And I need to be positive with other carers, but myself as a carer, I now believe it's not going to happen. You just need to get on with it yourself and make the most of it. I think one of the important things is support from other carers.

Here, we can see how disillusionment with government inaction can lead to disillusionment with the very concept of social change itself. Believing in the potential for change is often said to be "idealistic". In the weight of years of historical experience it seems far more reasonable to argue that hoping for government action is far more idealistic. Without a social movement and the collective power of labour, a lack of faith in political parties or electoral politics can lead to a rejection of politics more generally.

It is precisely that disillusionment that feeds into the atomisation often expressed. It is little wonder in this context that carers find the various carers centres to be a much

needed refuge from the consequences of systematic problems in health care and services more generally. In a very similar way the advice given to other carers was to “look after yourself” and to appreciate that you cannot carry it out 24/7.

#### Disclosure

One of the main threads that runs through the interviews with respect to existing service providers (and often to society in general) is the idea that “they don’t get it”. As a result, a lot of the focus is placed on “making people listen”. Largely, this stems from a clear frustration from being ignored. However, it seems that the government is aware of the problems even just by looking at the wealth of previous research highlighted in Chapter 6.

In any event, the idea of generalising the reality of carer experience is a vital part of the process, when coupled with the wider political analysis of the context in which it takes place.

#### Accounting

Looking at this wider context is vital in terms of looking at cost implications and how you more broadly “account” for unpaid care.

If that person gives up their job to look after whoever it is, they’ll eventually become unwell themselves. They’ll become depressed, and then it can be an ongoing cycle. If you’re doing it all the time I don’t think it’s good for you or good for the person.

This points to arguments for much greater support at a much earlier stage. However, as explained earlier, none of this is necessarily present in the logic of those making the funding decisions. It seems that arguments made in Chapter 6 about the financial costs of care resonate with carers.

#### **7.4 Interview 4**

The next carer looks after her husband and has been doing so for around 19 years since he had a triple bypass operation. In addition, to problems with his heart, he is also a

diabetic and suffers from neuropathy which is a condition relating to damage to the peripheral nervous system which eventually led to a recent stroke a matter of months before the interview.

#### Role of Carer

The thing I'm finding hard now is...the bed all had to be changed this morning. And now my washing machine, I came in to shower him and you may as well say my washing machine is on every day because by the time he gets changed. I think the sweat brings it because he takes four injections a day. Three insulin and then at night .. he takes 14 units three times and at bedtime he's got another insulin I have to keep in the fridge and he's got pills I must keep in the fridge and he takes 22 units at night. It's quite heavy and don't ask me how many pills he's on, he's on about 19 pills, 20 odd pills a day. I usually keep his prescription because I can never remember. He's on heavy medication. You can't leave him. He's got a Zimmer and he's got one of these delta with the three wheels and the physio comes to shower him. He's going tomorrow to the Southern General to be assessed for an electric wheelchair because I can't push him. It's too heavy.

The weight of responsibility for washing as well as ensuring some level of mobility for the person being cared for is clearly a major source of stress. Although the medication in this case is regularly taken by the person being cared for themselves, the constant worry and the feeling of needing to monitor this is also echoed in Interview 1.

#### Benefits

Again, as with previous interviews, the complexity and strict rules within the benefit system proves to be a major problem for the carer. When asked about possible support, the response is not encouraging...

I didn't know anything about it. We never ever claimed for anything because every time you claimed for something you were told 'you're over the limit', so we just ... I said 'there's no point in putting in for anything'.

Often this ends up being correct because of the myriad of rules which limit access to support. However, as a result of this justified cynicism, people who are entitled often do not get access to support they *are* entitled to. Arguably, this discouragement from

going through the claiming process itself is part of the justification for the rules, the length of benefit forms and so on.

In addition, as a result of the complexity of the benefit rules, when asked about carers allowance, the carer states...

I think my husband gets that. He gets a bit of that...he was only getting the middle rate of component care [for Disability Living Allowance]. We put in to see if we could get the full rate now because he's pretty bad. We got a letter stating that they were dealing with it and it would take 10 – 11 weeks. So another few weeks to go to see whether he gets this or not.

This uncertainty is completely understandable as carer benefits are tied up with those of the person being cared for. However, it is clearly a disincentive to claiming. Another aspect of this is the painfully slow turnaround of almost three months before any decision is made regarding the worsening of the disabled person's condition.

#### Respite / Support

As is so often the case, the main source of support is found in the carer centres. These centres are often provided by independent charities like the Princes Royal Trust or Quarriers.

This [carers centre] is the best place. I only found this as an accident. Somebody came to my house about something and said 'Do you know the carer's centre in ScottishPlaceB?' That was when I got to know these people in here. I've had more support in this place with these people.

In addition to this, sometimes there is the creation of a conflict between the carer and the person being cared for.

I have a girl that comes in and showers him as well...but that's all I've got that comes into me. If I say to him 'You want to go to respite for a couple of days?' I don't think he would accept that because he would start thinking you were putting him away out the road. He would start imagining that maybe I was trying to get rid of him.

This could well highlight some of the difficulties that arise from disability discrimination. As stated by the carer, there is a limited amount of support provided

directly to the house. Coupled with this the loss of independence associated with care homes and so on this may mean that people receiving care are wary to change the situation despite it meaning reliance on family members. Thus the result is the denial of the carer's self interest in order to ensure both that adequate care is provided and that this is done in a way that prevents certain types of emotional trauma. The latter is difficult to conceive of outside the ideological pull of the family unit and the assumption that this is where responsibility should lie.

This shows the problem with such a close personal relationship being the main form of care being provided. In addition, it may well be the case that simply having to leave the house may be such an upheaval and so unsettling that it makes it very difficult for the carer. It could be possible to have a carer come round to provide respite, but of course this would need to be coupled with provision of appropriate accommodation for the carer so they could get the benefit of a proper break. Again, it is worth mentioning that many people understandably want to stay with their family or friends despite the difficulties. In this case it would be far better to have a consistent level of support available.

#### Employment / Carer disability

Another factor which increases the problems surrounding care is the relatively prevalent discovery of *carer* disability in the process of conducting these interviews.

I was in terrible bother with my back and one day at my work... they took me to the Victoria Infirmary. The doctor discovered there I had a twisted spine because I was shifting big heavy machinery in my work... I went part time [and] then I had to stop it.

Largely this seems to be about poor health and safety due to unsafe lifting. This shows the importance of other factors often seen as separate from the practice of unpaid care. It also chimes with the analysis of created impairment outlined in Chapter 3 on "socialism" and in Chapter 8 on disability discrimination.

In addition, in looking at this area a lot of the negative stereotypes start to come unstuck.

I worked since I came out of school when I was 15. I never took time off my work. Took time off to have the kids and as soon as they were grown, back to



work again. My husband, he always worked as well. God, it used to be 6 o'clock in the morning...we didn't come in till 10 o'clock at night.

Contrary to being "benefit scroungers" this carer was determined to work despite it causing an injury which has affected her for the rest of her life. The ideology of 'benefit scrounging' and that people are actively seeking a life on benefits is more about sowing division than it is accurate depiction. Thinking about this example starts to unpick these myths but shows why explicitly seeking to disrupt current ideological understandings is so important for attempts at social accounting.

Social Impact and financial (mental health)

Aside from the stigma of not being in full time employment, there are also the other social impacts in terms of enjoying leisure time. Describing the change on taking on the caring role...

I only go out with my friends maybe once. Sometimes I manage to get twice a week, but very seldom. I'm lucky once a week. An odd time I manage to get out on a Saturday with him but it's only two hours. We'll go for a game of bingo and back again. That's about it. Whereas before I could have got up and went away. So you are tied. You feel it gets to you sometimes, when friends are saying 'we're going to do this' ... So it does have a bit of a drawback but what can you do? It's one of these things that happens.

It starts to become clear as you look at this quote why people have argued that carers (and the people they care for) are not afforded the same opportunities as other people in society.

One of the other things that is vital to appreciate is the tension that can play out in the process of caring. In giving advice to other prospective carers she explains...

...You'd need to have good patience with them because they can get so agitated and then they get you agitated and you get yourself so worked up. Sometimes you get yourself [so] stressed that you have to open the door and go to the shops for a walk because you'd end up choking, some days.

Clearly, this sense of frustration can spill over without adequate social support. Indeed, given the arguments given earlier about the idealisation of the family, it could well be

that tensions would exist even with that support. Describing the effect it has on even getting a regular sleeping pattern, the carer explains...

He takes terrible pains in the legs with this neuropathy thing. Some nights he can't get to sleep, so you're up half the night. Whereas he can go and lie down during the day and get a sleep, you've still got your usual schedule to do. That's a bit hard when he's up two or three times. Sometimes you'll maybe get a couple of weeks he's brilliant and then the next week you could be up nearly every night with him, just depending on the pain. The pain kills him. So you're more or less working round him, getting up in the morning to see how he feels. If he doesn't feel very good then that's your day up in the air again.

Again, this highlights the variability of such conditions, a variability and unpredictability that is simply not captured in forms that want you to quantify in some tick box scale the nature of the disability.

Connected to this are the sacrifices that need to be made by both the carer and the person they care for.

We used to go to Spain twice a year. We used to go to Canada. We always went to Canada in September. We made it last year but that's him finished with travelling now... I suppose we could go but I would need somebody with me to help me, and then you just think of the hassle...

Again, any talk of genuine equality means providing support to people so that there is a level playing field for everyone. That often means additional support but sadly this is not forthcoming and is even less likely under the current neoliberal paradigm.

Financial

Indeed, this is also true for financial support.

With only the two of us I wouldn't wash till maybe two or three days later when I had a pile. Now with him I'm washing every day, and you're using your dryer, so my electricity is going sky high but what can I do? I've got to do it. It would be better if you got a wee bit of help with something like that...He feels the cold quite a bit. So you're using a lot more... That's what I feel is quite expensive, the gas and electricity because he's cold now, whereas he never felt the cold...

Again, this is one possible improvement that could be made but when you have an impairment you will be disproportionately affected by every increase in energy costs since you are often more likely to spend more time in the house.

### Family

Much of this is made much worse by the assumption that the family can take on the majority of the responsibility. As was stated previously, this places additional strain on familial relationships. When social relations such as this are viewed as part of a totality, the family takes on new meaning. In a society driven by profitability and shareholder wealth maximisation, it is easy to see how having people who are out of the active labour market through their own impairments can be thought of as largely irrelevant. The role of the family here is in reinforcing the expectation that relatives of the person should carry out any required care within the household. The result of this is to have a series of individuals, unsupported and atomised. The prospect of collective agency although not eliminated is far harder to imagine within the four walls of the family unit.

It's [having an impairment] quite a thing for him because he was always a worker - never lost time off his work or nothing.... I think he's starting to accept it a wee bit now but in the beginning in June when he took it, Oh My God, it was terrible living with him. Everybody was at fault and I think now I lost my head one time and said 'You keep this up you're going into a home.'

Again, in mentioning support, it becomes increasingly clear that the state is just assumed to play no role with informal support through carers' centres or the family unit playing this role.

They [the carers centre] keep you right up to scratch with everything and they ask you do you want a break from him. They'll get somebody to sit with him but I'm not so bad that way. My son will come. But then again you've still got to depend on people because we don't have the car now. We had to give the car up. So to be taken anywhere or run anywhere I've got to depend on the family.

This notion about the family is repeated again later in the interview.

I tell you one thing. If I didn't have my son I don't know how I would cope because he is a great help, a great help for him.

The questions then arise, “What would happen if the carer had no family?” and “What would happen if the carer was not there?” Familial responsibility is thus deeply engrained into the discourse surrounding unpaid care. From this discussion it starts to become clear why a dialectical approach which appreciates the contradictory nature of the family is so important to attempts at social accounting. Whilst the family undoubtedly plays a social control function, those requiring care without family members available to support them will suffer even more. Similarly, carers without other family members to support them are in a relatively worse position. In the absence of state support, the family is often the primary means of care provision.

#### Government / Choice

Exactly this latter question is then considered.

They would need to put him away because he’s no fit to look after himself. Rebecca couldn’t do anything for him and Lucy watches her grandkids so she wouldn’t be able to do anything. His brother is away...His other brother’s in Canada, so he would actually have nobody.

Again, the expectation of the state is noticeable only in its complete absence from discussion.

#### Engagement

This is reflected in a somewhat tragic stoicism when reflecting on the increased social alienation...

What can you do? It’s one of these things that happens.

Similarly, when considering the future the carer simply states “we’ll just have to plod on and get on with it...nothing else for it.”

The role of ideology here is extremely significant since that which is socially determined appears as natural and inevitable. More generally, when people view history, the specific and partial segment of time we experience appears to us as universal.

Here, what this means is that a great deal of determination to support the disabled person remains but the hope of a better support system is all but completely

extinguished in the wake of life experience with all the lack of provision that has entailed thus far.

### **7.5 Interview 5**

The next carer looks after her son, a seven year old boy with ADHD (Attention Deficit Hyperactivity Disorder).

#### Role of carer

On speaking about the local carer centre where the interview is being conducted, the carer shows how much of her caring role is perhaps just expected as a result of her parent status...

I'm not really sure if I can come in here in terms of being a carer because he's my child. Because obviously my perception of being a carer, even having worked in social work, was that it would be caring for an elderly relative. I didn't think that caring for my own child fitted the criteria for that because obviously as a parent you're expected to care for your child.

Tied into this is the idea that people are not legitimately entitled to support as the family becomes the "natural" place to seek support. Part of the reason for exposing the reality of the caring experience is also to show how prevalent caring actually is. This expectation of familial support is a key ideological tool in justifying future arguments about cutting state provision through the NHS and social work departments.

#### Benefits

One part of this classification as a carer is the criteria used to assess disability in the first place. Clearly, if the person is not deemed to be disabled, then the carer similarly goes unrecognised...

I applied for ...for disability living allowance for him. But it's a strange benefit because obviously there are things in terms of a child that you would expect ... It's classed as normal 7 year old behaviour. How to differentiate between that with somebody that's got ADHD... there's no set criteria for it. What I was told before is that it tends to be awarded to people if they're on medication or if

they've been given a diagnosis. I've been given both and was turned down last year for it.

In addition, we again meet the seemingly common problem of "underlying entitlement" discussed by a number of other carers.

I know there is a carer's allowance. I'm not quite sure how it works in terms of benefits or anything like that because it's not something I've went into. I've got...incapacity benefit and I'm on income support. It's not something I think is applicable.

Unfortunately, in this case the carer is correct but the uncertainty here again also highlights how unsure people are about what is and is not available.

### Employment

Another aspect of this is the prevalence of carer disability itself. We should be clear here that work is certainly no guarantee of avoiding mental or physical illness as a carer...

I was assaulted about three times within the space of a month. I was off long term sick. Basically that was the first real bout of depression I had.

In addition, the carer has high blood pressure, diabetes, sciatica and arthritis, all of which clearly make the caring role all the more difficult. This seems to be a fairly common occurrence and it seems particularly significant given the "Big Society" ideology which places emphasis on voluntary and unpaid work. The rationale driving this is outlined in the political economy of carers section in Chapter 8.

### Support

In terms of respite, again we come up against the same problems, both financial and social. With regard to possible help that could be available the following is proposed...

...maybe a befriender or something like that coming in to Robert, but obviously I've got to meet the cost of expenses. The carer centre will pay for the worker, but it's up to me to pay the expenses for that. Obviously that's very time limited...I would hope that may be something social work could pick up because the drastic effect would be if I got to the stage where I ... I mean I felt I was there

last week, by saying I can't care for this child. It's over to you. Basically I was weighing that up and what I felt my alternative was. Either to put him and I in the car and run it into a wall, which is where I was at, or dump him on the social work and say "I've had enough, I'm off, it's up to you to deal with." Both very drastic measures but I still ... I don't really see much alternative to that because I think there's nothing I'm getting, no feedback that I'm getting from social work that's going to offer me an alternative to that.

This quote is particularly distressing as it highlights the consequences of a prolonged lack of support, as well as raising questions about the appropriateness of expecting carers to carry out the role they do. Again, this is intimately tied to the idea of "symbolic violence" and the weight of expectation placed on people in their role as parents and carers.

Indeed, largely as a result of this social pressure, informal networks (in this case an organisation called "Gingerbread") start to be looked to as a valuable means of support in the absence of other reliable provision. The carer then mentions the importance of having a social network.

You were then able to build up a kind of network with the other parents. What they encouraged was that the parents would get together and then we could maybe combine with them and say... 'Could you look after Robert while I go to the hospital?' Or they would say 'I'm going to do this. Could you look after my child?'...Which is fine in the kind of normal range. The difficulty I had obviously was because of Robert's particular problems, it's hard to leave him with somebody else because it can be a real wake up call for them if they're not used to working with anybody and because his needs are so constant.

On the one hand, these informal networks point to the potential for a self organised well funded community based care scheme. However, as highlighted in the above quote, the existing conditions result in the appropriateness of the informal network being cast into doubt. Without training and well equipped and supported staff, it is difficult to see how this state of events is sustainable, either in terms of the needs of the person being cared for, or the needs of the carer.

Social Impact

Time and again, the desperation of the situation expresses itself.

Behaviour within the house is certainly getting to the stage where I can't deal with it any longer. I want to kill him, basically. So much so, that this weekend past was chaotic and I basically phoned his Dad and said 'You're going to have to take him because I need a break. Otherwise I'm going to physically ravage him'.

Once more, the lack of support is shown to lead to a situation in which psychological if not physical harm can come to both the carer and the person being cared for. This shows up the family as a site of oppression.

From the interview, it was clear throughout that the carer had the best interests of her child at heart but faced increasing pressure to the point where it becomes so intolerable that it cannot continue in the same way.

I phoned the social worker. He's got a social worker assigned to him. She came down. I explained to her how I had felt, the steps I had taken. Basically what's she's saying to me [is] 'I think maybe your mental health needs a wee bit of looking at', nothing at all to do with the lack of support from them in terms of how they dealt with him. Basically it's me that's the problem... *But to be honest it's crap...because as far as I'm concerned if I was getting the support in dealing with him then I wouldn't be at the stage I'm at just now...*(emphasis added)

The totality of social relations is again ignored in favour of a perspective which places emphasis solely on individual experience. Foucauldian critiques of the classification of mental illness are also useful here. The idea that the labelled individual is then 'the problem' helps to ideologically sustain a system where providing adequate support would run counter to the wider interests of profitability.

Of course, that is not to say that the caring role has no health impacts on the individual. By appreciating the carers commitment to the child's welfare, we begin to see how carers health can end up being sacrificed as the person being cared for's needs take precedence.

I'm just waiting to go back into hospital and they're going to take out the gastric band that's in, replace it, and fix my hernias. So that again will have another big impact on what happens to Robert. I'm not quite sure where he's going to go while I'm in hospital and recovering. So that's a concern.



Again, it seems unreasonable that this should be a concern that carers have to deal with as clearly they should be able to deal with their own health concerns without feeling it necessary to delay these indefinitely in the context of no possible substitute carer being provided.

### Family

The idea of the family as the vehicle for support is similarly posed as a potential problem.

I've got a lot of health problems with myself, so I find it very hard to deal with him. I don't have any support outwith. In fact, I don't have any support. His father takes a very passive role and dips in and out as and when he feels like it.

With this in mind, the question raises itself of who should bear the responsibility for the provision of care and to what extent carers treatment can be deemed reasonable and "expected", parent or otherwise.

### Government

In this regard, the role of the state clearly comes into play. As a former worker within the social work department, the carer describes the situation thus...

It's all about meeting targets and they're not really looking at what the problems really are. It's spinning plates, and it's how many plates you can spin at any one given time.

This constant sense of crisis is well outlined in other research into local government provision (see Ball and Seal, 2005). With such a chaotic underfunded situation, it seems almost inevitable that reforms (like those in the NHS) become the consequence of long term underfunding where the private sector is advertised as a potential saviour by government figures.

It is also, however, the almost Cartesian decoupling that takes place within service provision; the toing and froing between different departments that allows the individual units to deny responsibility and also prevents any kind of useful joint up assessment of the situation.

I'm not sure who they're assessing, whether it's Robert or me, but when the assessment is complete it will be 'long term we think a bit of respite care, but in the meantime you go away and have attend to what you need'. Whereas in actual fact it's about both of us because it's the two of us that are living in it.

Continuing in a similar vein, we are informed...

...they're now split into child care and adult care and they've each got their own budget. What she said to me [is] it's down to resources. Then child care are saying it should be adult care that's paying because it's actually really the parent that needs. Adult care are saying we think it's child care that should be paying because it's the child that needs. They push it back to adult care, adult care push it back to child care. meanwhile I'm sitting in the middle...

The ongoing lack of support leads to the following advice to other prospective carers...

I think if they can get out of it, the better. I think it's fallen to me... I don't know that anybody would probably take on the role willingly. I think it's a role that people take on because they're in the circumstances, where it befalls them that they have to. Certainly I feel it's my lot because he's my child and I have to take it on and you've no choice in it.

Clearly, the role of accounting here is clear for all to see. The allocation of what are effectively different cost centres each with their own financially driven targets provides a useful ideological tool which conceals the potential for possible alternatives and often prevents a wider assessment of the uses and priorities of government and local council finance. It is precisely this Cartesian decoupling of the interrelationships which exist that the dialectical approach here seeks to address. Although coming from a different methodological standpoint, this echoes a logic laid out in Martens and Murphy (2000)\* when they discuss how defence spending in the US is effectively taken as a given, yet pensions spending is somehow unsustainable. When you bring these areas together, you look at neither one the same as you did before.

Improvements

One of the key things that the carer mentioned was opposing the idea of the carer having an underlying duty which they are obligated to fill.

It should be an established role as opposed to one that's expected to be filled. Much, I suppose in some of the same ways feminists expect the 'female' role to be done, that it shouldn't be a wife [or] mother.

There is thus an explicit recognition of the arguments made later in this thesis regarding the role of the family. In this way, we can again see how the goodwill of carers is being used to justify the lack of provision by governments consequently being able to claim that the role is carried out. However, "at what social cost?" seems a pertinent question in this regard.

#### Disclosure

In terms of the usefulness of the social accounting provided here, one of the other factors is the lack of understanding of mental health issues.

It's harder to deal with. If you've broken your arm it's a justifiable 'I've got an injury'. So the expectations of people round about you are very different because there's a lot more sympathy and empathy given to people who are looking after somebody who's very recognisable in terms of [their] need... Sometimes I think I should be carrying a banner with me: 'He's got ADHD and it's not quite as easy as just telling him no'.

The stigma both for the disabled person and the carer is noticeable in the interviews. Being made to feel socially unacceptable is unfortunately just one negative part of the caring experience and one of the many reasons why there should be further support and campaigning on mental and physical disability. Here, it is difficult to separate out the assumptions about children within the family from disability discrimination. It is quite possible that both play a role in this case. It is assumed that children should follow and obey rules and that there are clear lines of acceptable behaviour for which the parent is largely or solely responsible. In this way, the role of the family as a disciplining mechanism can be made more apparent.

In addition, with regard to disability discrimination, although there are always debates about exactly what is defined as "disability", the recognition and awareness questions remain central. In this case, a lack of understanding in general of disability results in people not understanding why a child might be extremely hyperactive. This reinforces the feeling of societal exclusion those with disabilities face and by association often

their carers as well. Moreover, once you are aware of these stigmas, you are more likely to withdraw from wider interactions. So long as there is an economic rationale for those outside the labour market and / or claiming government support to be viewed with suspicion, educational activities to raise awareness are likely to have a limited effect. Put simply, the motivation to do this will always be held back to some degree under a system where profitability is the key consideration.

## **7.6 Interview 6**

The next carer cares for three people, her elderly mother (6 years of care) who is physically disabled; her husband (14 years of care) who has psychosis and paranoia and her niece who has bi-polar disorder (3 years of care).

### **Role of carer**

Given the number of people she cares for, this obviously entails a number of different types of care. For her mother, it is predominantly helping with physical tasks like making meals and getting the shopping. Her former husband, who she is now separated from she cares for in order to give her parents in law respite! With regard to her niece she describes the demanding nature of the role.

On several occasions she's been hospitalised for overdoses and slitting her wrists and burning herself and lots of self harm. She's got children, so I've got to more or less go when the phone rings if she's done one of these things, either to look after her children or be there to support her.

The scale of the caring role carried out here is remarkable. Particularly with regard to the niece, it seems that she feels she has no real choice but to drop everything to provide support.

### **Benefits**

One of the topics mentioned previously was the unfairness of not being appreciated for the number of people that you care for. In this instance, it makes the presence of the "underlying entitlement" due to the carer receiving benefits all the more distasteful.

## Respite

Given the lack of financial support, what is particularly of note is the extent to which carers often place the needs of the disabled person ahead of their own needs.

With respect to the possibility of even limited respite opportunities we are informed...

...my husband and my Mum as I said prefer me. They don't want outsiders coming in. That's fine, but for other people I could see respite would be a big help for them.

Despite the strains it places on the carer, it seems that support in this regard is only deemed appropriate for others. It is quite possible that given both the carer and the people being cared for have known nothing else but unpaid care, this becomes the norm – a norm which they are perhaps hesitant to risk changing.

## Employment

In terms of sacrifices that carers often have to make, one of the main ways this arises is through having to give up paid employment. The carer used to be an escort for special needs schools and this involved taking the children back and forward to school. Describing the reasoning behind this, the link to care is clearly expressed...

It was because I was having to care for my husband. Because of his mental illness he was going off the rails a bit. I had to stop work and be there for my children 24/7

It is important to point out as well that this is not a choice that is made lightly. Speaking of the decision to leave work, the carer states...

I would actually like to be out working, meeting people again and getting back into society a bit better.

The social aspect of work again is mentioned and highlights the isolation involved in taking up a caring role.

## Support

Given this, it is often the case that the informal mechanisms play a central role...

The carer's centre here are very good. They're very good for support for me. If I want to come in and talk, which I've done a few times, I've come in and had a wee cry and a wee talk and let a wee bit of pressure out. They referred me to the stress centre in ScottishPlaceC and they gave me a course of massage therapy which was very beneficial.

## Social

This theme is continued later in the interview. When asked about the impact of caring on her social life she states:

I used to go to bingo. I love the bingo. I'm a bingo fanatic. I liked to go out and socialise with my friends. I'm more or less down to one friend now because I just don't have the time sometimes but most of the time I don't have the energy. I just want to sit and relax when I'm not doing any caring. It's time for me because as I say I have an illness myself and...that pulls me down a lot so there's a lot of times I don't want to do anything.

The narrowing of the carers social circle as well as the demands of the caring role make it increasingly difficult to maintain an active social life outside of care. On describing the impacts of being a carer and giving advice to anyone else in the same situation she explains...

I know I can be in tears two or three times a week with the mental strain, it's really hard.

## Financial

Of course, none of this is helped by the lack of any real support financially. Although the main up front expenses involve cooking for her mother and petrol costs for travelling to visit her sister, the lost income from having to give up employment also has to be taken into account. Perhaps with respect to additional support, some help with travel costs may well be beneficial.

I have the car, but that's a big expense for me, my car. I couldn't do without it, for myself as well because I suffer from a problem with my feet so the car is for me as well. That's a lifeline for me...

The idea of being able to easily travel is consistently mentioned and is found in Interview 1 as well. It becomes clear that if something was to happen or the car simply starts to wear out, the financial situation make this situation basically irretrievable.

### Improvements

Although hesitant about the idea of respite, another possible improvement mentioned was...

...being able to go on holiday...because that's things you can't do when you're a carer. You can't just drop everything and go on holiday. If you were able to take the person you were caring for away on holiday...I know you're not getting a break then as such but it's a change of scenery...something different. So that would maybe be helpful.

The idea of being fairly bound by the lack of other provision, or, in this case, a commitment to meet the needs of the person being cared for basically rules out holidays unless some additional support were to be provided.

### Family

Throughout the interview, the idea of having a sense of duty to her family is very clear and again the prevalence of carer disability is highlighted.

It's very difficult because I actually don't keep great myself either, so it's very difficult. But it's something that I feel I have to do because these people are dear to me. It's just something I do.

Explaining this as something "I have to do" shows the importance of ideological coercion and expectations regarding the family. Similarly, when asked about the potential alternatives available, the carer explains...

Nothing was ever questioned other than the fact that I would do it. I just kind of fell into that role and I can't say I was quite happy to do it. I don't complain about doing it. I just do it. My Mum and my husband prefer it to be me. They don't like anybody else having a hand in their care. My niece is different. She will take help from other sources.

The sense of inevitability of having to play this role comes through very clearly as does the conflict between wanting to do the “right thing” by her family and being fully aware of the impact it will have on her own life.

### Engagement

Much of this feeds directly into the ideas about achieving change within the existing carer setup. For the most part, the ideas of familial responsibility, the goodwill and desire to help others close to her overrides pretty much everything else. On describing her role to other prospective carers she states...

I would describe it as an unpaid job but a worthwhile job. I would say that it's because it's family you feel like it's your duty. I think most carers are selfless anyway and you just do it and get on with it. It can be hard on you. It can be very draining. But it's just something that you do.

The idea that “it's just something that you do” comes through time and time again and shows the stoic attitude towards the situation, which often can feed into a fatalistic logic that questions whether it can ever be different. It also, however, highlights the feeling that she has been swept up in the course of events and her role is simply expected by society.

One of the interesting points about this particular interview is how much shorter it was compared to the others. Largely, this seems to be connected to the above points; the idea that it is just something you do and that it was always going to be that way mean that there perhaps does not appear to be much to discuss from the carers perspective. Perhaps also, she has not spent time dwelling on her own situation given the extensive caring role that she provides.

### **7.7 Interview 7**

The last interview took place via telephone as a result of the distance involved to conduct a face to face interview. Unfortunately, there are no verbatim quotes due to the difficulty in recording via telephone so the following will only give a description of most of the main findings.



The final carer interview took place with a woman who cares for her mother who has mental health problems as well as having had anorexia and now suffers from transient ischaemic attacks (TIAs)<sup>27</sup>.

### Employment

In this instance, it was actually having to leave work that led to her becoming a carer, as opposed to the other way around which is so often the case. In trying to help a patient with a broken bed, she received permanent damage to her back and is no longer able to work. The accident is believed to have taken place because there was not an adequate assessment of the patient's needs and so this contributed to the greater agitation which preceded the accident. We, once more, see an example of created impairment in relation to the workplace as outlined in Chapter 3 on socialism. However, what is also of note here is that women who find themselves at home are so much more likely to be drafted into the caring role. Not only that, but the gender divide in terms of types of employment for men and women often reinforces this as she had already come from a caring profession.

### Carer disability

Although originally the injury to her back was the cause of having to leave paid employment, here the carer has a number of other serious disabilities and / or illnesses. In addition to being hepatitis B positive, in this instance the carer has fibromyalgia, arthritis and possible rheumatism and bowel disease. The scale of carer disability is particularly pronounced here and it poses the question of how severe and widespread such cases actually are and why they are being expected to carry out the role that they do.

### Financial

Of course, financial pressures do little to alleviate the stress involved in being a disabled carer. In this instance, the carer has been made bankrupt and this poses serious problems for her in relation to the care of her mother. As a result of the bankruptcy, she can no longer assume "continuing power of attorney", only "welfare power of attorney" which, in essence means that she cannot take on responsibility for financial matters.

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<sup>27</sup> Effectively a kind of "mini-stroke"

In addition, the problem of additional transport costs given the rural nature of their setting can be quite substantial. Since there is no available public transport, the taxi costs more than £50 to go to the GP. As a result, the carer has to combine her own appointments with those of her mother in order to minimise these costs. The carer also points out the irony of having a Scottish bus pass if there are no buses available to use them on!

### Benefits

As a result of the carer's extensive disability, she receives both Disability Living Allowance and Incapacity Benefit. As a result, she receives no extra financial support in the form of carers allowance as she has "underlying entitlement".

With respect to the DLA, the carer finds this support extremely important in allowing her, for example, to get aquapuncture which the carer finds helps her to relax enough to be able to sleep.

### Support

With respect to support that is available it is often totally unsuitable. The carer explains that currently she is allocated 3 hours a week from a cross road attendant who is not allowed to do housework for her mother. As this is only put into one visit, there is no real opportunity for respite apart from this day. This increases to only 4 hours a week and 2 visits when she is away which concretely demonstrates that the caring need would simply go unmet without her carrying out the role. The carer points out that it would be much better if these hours could be spread over more days (e.g. 4 of the 1 hour slots) to allow a break each day. In this vein, we begin to see how attractive personal budgets begin to look when you have an under-resourced alternative. Given the lack of flexibility in meeting both the carer and the disabled person's needs, it is perfectly understandable why the theory behind personal budgets can be seen as liberating. Even if it is not realised in practice, you can see how the promise of greater autonomy is an attractive one.

### Social

With respect to the impact on her social life, the main problem is that everything has to be planned around her mothers needs as well as managing her own disability. As a result of her caring role the carer has had to forego going to music festivals such as

Celtic Connections. In addition, the number of opportunities to visit her friends in Glasgow has become severely curtailed.

### Family

In this case, the carer is becoming concerned about how her caring role for her mother is affecting their relationship. Given the sacrifices alluded to in the previous section, she can sometimes feel resentment due to the seeming permanence of the situation with no obvious breaks in sight. This again highlights the potential problems in making family members carry out these tasks in such an intensive way and the violence implicit within these expectations.

## **7.8 Conclusion**

Whilst the nature of what caring involves was always going to be as diverse as the nature of the different impairments or more broadly, the reasons for the person having care needs, this section will attempt to generalise the key themes emerging from the interviews conducted.

### **Carers Allowance**

One of the most striking findings lies in the discussion of Carers Allowance – the only benefit ostensibly available for the caring role itself. Here, it is important to put this discussion in the context of ideological arguments about “benefit scrounging” and “benefit cheats”. Media reports and government rhetoric mean that people now believe that fraud represents 27% of total benefit expenditure, even though the figure for 2011/2012 was in reality just 0.7% (Ball, 2013). Coupled with this, the ideological justification behind increased government checks on disability benefits is that people are not really deserving. The use of ATOS in the assessment is at least partial evidence of this logic. The effect of this is to create a situation where people are split into the deserving and undeserving poor.

Therefore, it becomes apparent that how unpaid care is viewed stems partly from how disability itself is perceived. One interviewee described the “negatively based” nature of the approach to disability (Interview 1). He explains how his disabled mother wished to maintain the “vestiges of independence” and remained committed to carrying out certain tasks by herself. Instead of being viewed in the positive, however,

this was then used against the claimant as proof that no support was needed. The consequence for many claimants then is that you should not admit to “good days” for the disabled person and should only put forward the worst case scenario. The irony of this is pointed out by the carer since the disability forms themselves ask similar questions in order to “catch you out” (Interview 1). In other words, they simultaneously assume you are attempting to deceive them, whilst encouraging this in the very way the system is administered!

In this wider context, it is perhaps little surprise therefore that carers allowance was often described as simply being far too low (Interviews 1 and 2) given the role carers play, particularly in the context of some carers caring for two or more people (Interviews 3 and 6).

Two respondents also made the point that often carers wanted to complain but felt that this risked the small amounts they already had in terms of benefits or other entitlement (Interviews 2 and 3).

What was equally worrying was the confusion over the benefits themselves. One interviewee explicitly mentioned how this was a problem for many carers (Interview 2) and others seemed to prove this point as they seemed either unsure about their entitlement (Interview 5) or simply did not believe there was any point in applying (Interview 4).

However, by far the most enlightening finding was the discovery of the prevalence of “underlying entitlement” (Interview 1, 2, 4, 5, 6 and 7) or of not being entitled due to being in “gainful employment” (Interview 3). *In short, it appears that not one carer from seven interviewed received carers allowance.* This shows up the fissure between the surface appearance of a carers allowance and the reality in practice. Even though the benefit is not obtained, its presence in formal terms serves a legitimacy role since it can be pointed to as evidence of “recognition” of the caring role. Indeed, as it will be argued in the next chapter, this overlapping of benefits appears to be built into the logic of the original legislation for the first carer benefit.

### **Disabled Carers**

Another surprising finding was in the prevalence of carer disability. 6 out of 7 interviewed had some form of impairment (Interviews 1,2,4,5,6,7) and one spoke of the

deterioration of her health as a result of stress of the caring role (Interview 3). Effectively this poses the question of who cares for the carers but is also a fairly strong indictment of the existing lack of support. Of course, given that those outside the active labour market are often distrusted or seen as an expense to be minimised (see Chapter 8), if these findings were replicated within the wider carer population, it would mean there was even less economic rationale from the standpoint of capital to provide additional support. The prevalence of carer disability raises the question about carers relationship to employment to which we now turn.

### **Employment**

The problems of balancing work and care seemed to be a recurring theme in the interviews. In looking at this question, it is worth considering the emphasis on lost earnings used in carer research. Although carrying out unpaid care could prevent someone from entering or re-entering the labour market, one interpretation of the “lost earnings” argument is the idea that carers leave work in order to care. However, whilst three carers had to give up their job in order to care (Interviews 1,2 and 5) and one has already had to reduce her hours (Interview 3), two carers had to give up work due to workplace accidents or repetitive injuries (Interviews 4 and 7) and in a sense this made them available to carry out the caring role. Tied up with this is the idea that women who are seen to be “at home anyway” might be relatively “easy pickings” in terms of expectations to carry out the caring role. Of course, whether employment is sacrificed or not, the value and importance of the care remains in either case. It would be wise not to play into the ideology that implies only those carers who have given up employment are legitimate. However, from an ideological perspective, someone who was already outside the labour market would be considered far less of a loss, whereas it is far more difficult for a government to sing the praises of “encouraging people to work” whilst simultaneously preventing carers from doing so unimpeded because of a lack of support. The government is fully aware that not everyone gives up work in order to care but moreover, even where carers do this, it arguably suits the government anyway since it reduces the numbers of those actively seeking full time employment. It also effectively creates a greater market for the part time and casualised work which increasingly replaces full time permanent posts.

### **Care Support**

## Assessment of need

Two of the carers interviewed pointed out the inadequacy of the assessments carried out (Interviews 1 and 3). In one case, there was a feeling of discomfort at someone external coming in to assess you and negative feelings about the process sometimes led to anger being directed at the social care workers themselves (Interview 1). What can perhaps be frustrating about this process is the negativity surrounding approaches to disability support. If someone is physically able to carry out certain tasks in the absence of other people, it tells us nothing about how much pain and discomfort this causes. If someone genuinely makes a choice to do certain tasks themselves that is one thing. It is quite another when they are told they need no support regardless of pain or discomfort. Although it can appear that the main logic echoes that of achieving independence, the reality is that when council budgets are slashed to the bone, a kind of rationing will take place to some extent. In other words, although formally the support will be provided to anyone who requires it, if there is any indication that the person or a family member can carry out the tasks local authority support will not be forthcoming. This exposes the way government policy requires progressive ideological dressing to cover over the underlying rationale guiding carer and disability support. Another carer pointed out that even where needs are highlighted, there is no obligation to act on the findings and this makes the whole process seem rather pointless (Interview 3).

## Personalisation

Two interviewees pointed to the complexity of individual budgets (Interviews 2 and 3). Whilst one carer points out the weaknesses in the pre-existing provision which was too inflexible, there is real concern over: the impact of having to recruit your own staff; find replacements; the impact this lack of continuity has on the person being cared for; the financial returns and the effects of increasing competition for finding paid care assistants with such a high turnover (Interview 2). What is also worth pointing out is how sufficient amounts of care that meet people's needs could be provided within the public sector. If you make the service unsuitable enough, it becomes far easier to sell privatised care to those relying on it. Historically, this has been a fairly standard tactic to open the door to privatisation more generally. The recent media flurry about falling standards in the NHS is part of this dynamic. What personalisation also does is allows a wedge to be placed between the needs of the disabled person and those of the paid

carer who could start to be seen as a cost to be minimised to maximise the number of hours of support someone could afford. We have to understand why people might see personalisation as liberating in the context of a lack of suitable support at the right times. However, it is unclear how rolling out the free market in this way would benefit disabled people more generally since the same economic logic could be used against their employment or access to greater support.

### Respite

Given the lack of support in terms of access to breaks, one carer pointed out how the only access available to him was through a charitable organisation (Interview 1). Another carer pointed out how what was previously available in terms of respite had actually been taken away with no real explanation (Interview 2). This certainly seems to contradict claims that respite provision is improving. Whilst any carer would want to have the chance for a break versus carrying out the role non stop, it is worth recognising the limits of this as an end goal. This argument to some extent echoes academic discussions about “resilience”. It has been noted, for example, that “people can be very resilient and very unwell” (Institute of Development Studies, 2012). In the carer context therefore, we can ask to what extent carers being given the very basic minimum to continue in their role is actually advantageous to their long term quality of life. In a very limited sense, it may be “sustainable”, but not much of a life. Even with breaks, carers are returning to the same situation without adequate support.

Another barrier was in the carer trying to respect the wishes of the person being cared for who may not want any external support from outside the family (Interviews 4 and 7). This is interesting as it shows that the failure to provide the service which is arguably more coercive is coupled with garnering consent by utilising the concept of familial duty.

### **“Family Duty”**

Indeed, this is arguably one of the most clear examples of how carers view the situation. When asked why they carry out their caring role, whilst often mentioning the sense of duty, this has to be placed in the context of the lack of services available (Interviews 1, 3 and 7) and the cost of alternative care (Interview 1).

What is interesting is how the absence of the state support in this regard starts to be taken as a given, with the idea that the problem is that there are no other family members available being mentioned (Interview 2). Similarly, there is the idea of how much worse the situation would have been without other family members giving support (Interview 4).

From this discussion it starts to become clear why a dialectical approach which appreciates the contradictory nature of the family is so important. Whilst the family undoubtedly plays a social control function, those requiring care without family members available to support them will suffer even more. Similarly, carers without other family members to support them are in a relatively worse position. In the absence of state support, the family is often the primary means of care provision.

Although the idea that the caring role should simply be expected from family members is contested (Interviews 1 and 5), often the carers would not seek support since they are trying to appreciate the wishes of the person being cared for (Interviews 4 and 6). Here, it is important to see the expectation of a lack of adequate external support alongside the ideological hold of moralising narratives about helping your relatives.

It appears that we cannot separate out the concept of “family duty” from the context in which there is a lack of support available. Often the only choice carers have here is to simply allow the caring needs to go unmet. The notions of the family almost pre-empt people from demanding greater support. Part of this is that carers wish to respect the wishes of the person being cared for. With a more supportive environment, the person being cared for may well not be so reluctant since it would allow a much greater degree of autonomy. However, at a more profound level, we are all socialised into seeing the family as a haven from the cruel realities of the outside world and a vital support network. The end result of splitting up care along familial lines is to further atomise society into separate households with the prospect of collective agency ever more distant. This question is tied into feelings of social isolation which the next section describes.

### **Social Impact**

The feelings of isolation and being cut off from wider social networks were a fairly common theme throughout the interviews. The feeling that you “cannot switch off” was explicitly stated in one case (Interview 1) but this was much more widespread.



For example, one carer mentioned how sometimes carers feel their only option is to “kill themselves and their relative” (Interview 2) and that this takes place in the context of not getting sufficient support in the first place (Interview 5). Here, Foucauldian analysis of mental health classification being utilised to label the carer as “the problem” are valid. Rather than addressing the contributing factors to a given mental health problem, this serves to individualise the explanation with the social totality conveniently ignored. The anger and frustration involved in the caring role is also replicated in Interview 4, where the carer stated how she sometimes needed to go for a walk to get away from the situation.

Some carers also pointed out how mental health impairments of the person they cared for made them socially unacceptable since people did not understand either the impairment itself or the implications of providing care for someone with mental health impairments. This cannot be separated off from an understanding of how disabled people are viewed more generally and how those outside of the labour market (or seen to be a higher cost to capital) are systematically treated with suspicion and distrust.

### **Improvements**

The suggestions for improvements were fairly far ranging depending on the individual experiences of the carer themselves. Below is a brief list:

- £200 Flat Rate Carers Allowance (Interview 1)
- Payment of TV license (Interview 1)
- Payment of car tax / Help with transport costs (Interview 1; Interview 6)
- Greater training and emotional support for carers (Interview 3)
- Support for the costs of gas and electricity (Interview 4)
- An appreciation that the carers role should not simply be assumed because someone is there (Interview 5)
- The chance to go on holiday with the person you care for (Interview 6)
- A type of “zero rating” which ensures that the carer is not financially harmed by taking on the caring role (this could include equipment, travel costs, extra costs of heating and so on).

Of course, all of these could be subject to their own individual campaigns. However, in order to try to maximise the potential impact of any campaign, a suggestion is made in

Chapter 9 under recommendations. Another issue is the extent to which the demands are in the interests of the person being cared for. Clearly, there is a link between the support for unpaid carers and the people being cared for in the sense that both the person being cared for and the carer deserve to be valued. In addition, this should not be seen as counterposed to wider improvements in health care provision more generally or to improvements in disability allowances but as part of a wider struggle for universal provision which meets social needs.

From the perspective of the social accounting provided here we must recognise the importance but also limitations of suggestions for reform. Demands for reform can only resonate with any force if people are sufficiently convinced that their actions have meaning and that society can be transformed. In other words, we must resist the temptation to think social phenomenon are inevitable. In this sense, we must become a “class for itself”, aware of our agency and power as historical agents, rather than simply a “class in itself” where our common interests go unrealised. However, as the next section shows, this is far from the case at present.

### **Social Change?**

One of the depressing aspects of the interviews was the extent to which carers expressed a sort of stoic approach to the future. Believing that things will only get worse (Interview 1) or that they should simply “plod on” (Interviews 1, 3, 4 and 6) were commonplace. Whilst one interviewee (Interview 1) stated that the lack of support and all the obstacles just “made you fight harder” there was a real sense of despair over the potential for any improvement in the situation. This seemed to be tied up with a lack of faith in the government to do anything to help since they had all the information but refused to act on it (Interview 1). Whilst a lack of faith in capitalist institutions could potentially be progressive, here disillusionment with government inaction seemed to spill over into disillusionment with the prospect of social change itself. Of course, carers are not unique in this and revolutionaries are far from immune from ideology. For most of us most of the time that which is socially determined appears as natural and inevitable. More generally, when people view history, the specific and partial segment of time we experience appears to us as universal. Given this, without a collective environment to build joint campaigns and share common experiences, many carers feel isolated and relatively powerless.

This chapter has provided select parts of the interviews conducted for each individual carer and has concluded by drawing out some of the general themes. Whilst many of the findings are not unique, what perhaps is more unusual is how few carers actually receive carers' allowance. In addition, the prevalence of carer disability is also profound. Additionally, carers attitudes towards the prospect of social change highlights the need for social movements as well as providing alternative explanations of why things are as they are and to raise consciousness against the capitalist economic system from which this situation arises. The next chapter seeks to disrupt current ideological understandings about why unpaid care exists in its current form.

## **Chapter 8: Analysing the origins, persistence and growth of unpaid care**

This chapter will set out to provide a detailed explanation of why unpaid care exists in its current form in contradiction to the misleading argument that it is simply an inevitable function of an aging population. Instead, here it will be argued that unpaid carers situation is intimately tied up with the needs of capital. This is manifested in disability discrimination and the role of the family.

### **8.1 Introduction**

With an estimated 650,000 or more unpaid carers across Scotland (Scottish Government, 2012) from a population of just 5,295,000 (BBC, 2012), it seems reasonable to ask why this form of care is so dominant. For many, the explanation lies simply in demographic changes in terms of an aging population (UK Government, 2012c) due, in part, to people living longer (World Bank, 2012a) <sup>28</sup>. This situation has invariably been described as a care time bomb. In sum, the implicit argument seems to be that disabled people's needs go unmet because there are too many disabled people. Here, rather than seeing the growth of unpaid care as inevitable, this chapter will argue that this is intimately tied up with disability discrimination and the role of the family. Whilst much of the information regarding the "ageing population" may be technically accurate, even this has on occasion been significantly overstated. In one example, we are informed that:

Over the period 1985-2010 the number of people aged 65 and over in the UK increased by 20% to 10.3 million (UK Government, 2012c).

This is very misleading. First of all, the population as a whole increased to 62, 218, 761 in 2010 from its 1985 figure of 56, 550, 269 (World Bank, 2012). All other things being equal, this alone accounts for 10% of this figure. However, surely in an economy in which taxation from labour is used at least partially to fund social services, the relevant question is how this has increased relatively compared to the rest of the population. When we consider this question, people aged 65 or over as a percentage of the

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<sup>28</sup>For example, the life expectancy in the UK has increased from 74 in 1981 to 80 in 2009.

population increased from 15% in 1985 to only 17% in 2010 (World Bank, 2012c). GDP per person in the UK over the same period has increased by some 384% (World Bank, 2012d).

Therefore, what makes this problematic is not the fact that people are living longer but the lack of willingness to finance the requisite expenditure to meet these additional needs. Whilst NHS spending has (until recently) been increasing in absolute terms, both the direction of expenditure (PFIs, PPPs, IT projects and consultancy) and the *relative* decline in spending (accounting for increased demand) has been completely ignored. However, more than this, we must recognise that these funding increases serve to mask the long term implications of the insidious movement of greater market mechanisms into the health service.

We also need to recognise that the number of “unpaid carers” has probably always been high, but previously went unrecognised. The very fact that expectations have been raised by the creation and subsequent maintenance of the National Health Service (NHS) has contributed to a justified belief that carrying out unpaid care is not simply an “expected role”, nor a natural consequence of human existence (or assigned gender role!). For example, the campaign launched by carers groups to recognise the contribution they make to society is evidence of a politicisation of an issue that was already in existence but previously ignored. Attached to this is the widespread politicisation of women’s role in society; the changing nature of women’s relationship to employment during and after the second world war; and the feminist critique and movement that ran through the 1960s, challenging previously taken for granted assumptions about their position.

Coupled with this the neoliberal assault on the welfare state (most directly for carers perhaps the NHS cuts, council cuts to health and social care, attacks on benefit claimants and pensions) puts more pressure on individuals to pick up the slack, thus representing a shift in the burden of responsibility from state to family or individuals. The worst cuts since World War 2 are certain to exacerbate the problems for this growing army of carers.

The rest of this chapter will show how unpaid care is intimately tied up with disability discrimination and the role of the family under capitalism.

## **8.2 Towards a Political Economy of Disability**

### **8.2.1 Introduction**

As explained in Chapter 3, a dialectical approach is essential in understanding the social world. It is difficult to envisage a form of social accounting for carers that does not also start to account for disability more generally. A danger in more positivist based logics is that by ignoring disability from the discussion of carers you inadvertently buy into an ethos which presents disabled people as a “burden” on the rest of society. The first section seeks to provide a historical account of disability from ancient Greek and Roman societies to the present day in order to show how capitalism and its internal logic affects conceptions of disability. The subsequent section will then outline some possible explanations as to why disability oppression continues today.

### **8.2.2 Defining Disability**

One of the main difficulties in looking at disability historically is in the term “disability” itself. What appears superficially as an abstract debate around definitions actually goes right to the centre of current debates within this area. The dominant model is known as the “medical model” where disability is “a condition that arises from some inherent characteristic of the body itself” (Bishop and Boden, 2008, p. 3). Here, disability is viewed as an “individual failing and a personal tragedy” (Barnes and Mercer, 2010, p. 1).

This research will draw partly on the work of Barnes and Mercer (2010) who “differentiate ‘impairment’ as a medically classified biophysiological condition, from ‘disability’ which denotes the social disadvantage experienced by people with an accredited impairment.” (p. 11). This approach is valued here since the very focus on society as opposed to the individual was enormously liberating and broke with the previous ideological consensus that helped to constrain disability rights campaigning. This break marked an important watershed in disability theorising and so this definition is therefore consistent with the social model approach to disability. However, whilst this largely defines the approach, it is accepted that this is not without

its difficulties. As Abberley (1996) points out, the concept of impairment is not fixed in time and place and is clearly related to disability.

One consequence of this is that at the point where a given impairment may be prevented, eradicated or its effects significantly ameliorated it can no longer be regarded as a simple natural phenomenon...Rather it takes on a social aspect. Thus the experience of simple cataracts, or erosion of the hip joint, whilst once perhaps reasonably viewed as a product of nature, cannot today be seen in this country separately from the social phenomena of damaging social practices, NHS waiting lists, fund-holding queue jumping, age- and impairment-based discrimination and so on. (Abberley, 1996, p. 63)

To take another example, it is unlikely that most people with glasses would consider themselves disabled given their widespread prevalence.

What makes a focus on disability all the more important is that despite the formal appearance of anti-discrimination practices like the Disability Discrimination Act (1995) the practical effect of this law is often insufficient. To look at research on accounting firms as but one example, they are found to be “reactive rather than proactive in their approach to disability” (Duff et al, 2007, p. 35). Similarly, 73% of firms state they hire no disabled people with no firm ever having disabled people rising above 4% of their total workforce (Duff and Ferguson, 2007). Moreover, some 40% had no mention of disability in their equal opportunities or diversity policy.

In addition, the stigmatisation of disabled people continues to compound the problems faced in the accounting profession with one Human Resources manager interviewed conflating “mental impairment” with being “mentally disturbed” and adding that such people would not be welcome as they could not effectively “work as a team” (Duff and Ferguson, 2011, p. 354). This idea was further reinforced by the “depressing tendency” of the disabled workers interviewed to be “sheparded into less desirable, lower ranking, clerical work” (Duff and Ferguson, 2011, p. 363). Hopefully this very brief snapshot gives an overall impression of the barriers disabled people face.

### **8.2.3 A Brief History of Disability**

Of course, not all such barriers began with capitalism. In ancient Greece and Rome, for example, given the harsh and brutal nature of existence, many disabled people were forced to beg or rely on relatives for support (Garland, 1995).

The “negative religious omens” were central to the practices of infanticide, even if Judaism did not permit this (Barnes and Mercer, 2010, p. 15). Disability was seen either as evidence of wrongdoing or punishment for sin, with disabled people often being seen simply as subjects of charity (Barnes and Mercer, 2010). Tied into all of this was the myth of human perfection in bodily form, much of which continues in different forms today.

The feudal mode of production and the previous flexibility of working in the home gradually disintegrated with increased capitalist development. Whilst the agrarian economy still placed disabled people at the foot of the social hierarchy along with the poor and the unemployed, they were not systematically excluded from employment in the way they were after the industrial revolution (Finkelstein, 1980). Even if it was only as “stewards”, so to speak, this represented an important shift away from people having any sort of control over their means of production.

The shift towards wage labour within a market economy meant that disabled people were regarded as incapable of work and so the Poor Laws between 1552 and 1601 were introduced to minimise the cost of those deemed unproductive (Bishop and Boden, 2008). Ultimately, what this meant was the effective ideological separation of the “deserving” and “undeserving” poor with the former meaning exclusion from the labour market for disabled people and the dichotomy waylaying any deeper critique of the causes and nature of unemployment. In both cases, the “problem” was with the individual. The transformation into capitalist society with the industrial revolution meant the effective exclusion of disabled people from the workforce.

What Finkelstein (1980) noted as the “disciplinary power” of the new factories with their rigid work practices meant that the irregularity of many disabilities was seen to be unsuitable for the regularity of the new working practices. Similarly, the speed of the new work with machinery provided a further barrier to disabled employment (Ryan and Thomas, 1980).

This economic exclusion thus laid the basis for the increasing segregation of people with impairments into various institutions, effectively incarcerating those deemed



“defective”. The lack of support for disabled people no doubt chimed with the social Darwinism and later Malthusian logic that preached “survival of the fittest” with the corresponding logic that it was more “efficient” to simply let the “weak” and “infirm” die so they will be unable to breed or take up valuable “scarce resources”.

The Enlightenment and the corresponding notion that science was *the* solution coupled with capitalist development gave the “medical model” complete ideological dominance. The focus was thus how impairment causes disability and this was conveniently combined with the needs of capital since it suggests that the “problem” is with the individual and not with society as a whole. Focusing on what a person *cannot* do; on their “incapacity” places an emphasis on their need to be “fixed” and to develop suitable “coping strategies”. This is then used as a justification for why disabled people are more likely to be unemployed. However, as pointed out by Barnes and Mercer (2010), once you appreciate that this is the case for disabled people in general it makes little sense to argue that this is evidence of “personal failure” rather than systematic discrimination!

Similarly, the aforementioned trends also required an increasing classification of disability. Therefore, it is little surprise that whilst in 1826, the number in English asylums was just 5,000, by 1900, this figure had risen to 74,000 (Appignanesi, 2008). It was not until the 1960s and the widespread radicalisation that accompanied the civil rights, anti war and feminist movements that this “medical model” started to be seriously challenged.

It was at this point that in Scandinavia, North America and Western Europe that the emphasis was shifted from “incapacity” to “disabling barriers” (Barnes and Mercer, 2010). One of the most well known campaigns was the Independent Living Movement (ILM) where the focus was on self reliance. Spearheaded by student wheelchair users in the University of California who set up the 1<sup>st</sup> Independent Living Centre, the wider demands included greater autonomy and control, a disability income and new living options away from the much despised institutional setup. No doubt, the politicisation of disabled Vietnam War veterans returning also fed into a wider questioning of the discrimination against disabled people. Similarly, campaigns in Sweden for accessible housing also brought attention to disability theorising.

All of this undoubtedly contributed to the formation of the Union of the Physically Impaired Against Segregation (UPIAS) in 1974. It was at this point that the “social model” was developed with the insistence of a break from the previously simplistic cause and effect relationship between impairment and disability. One useful example of the implications of this approach can be found in the work of Oliver (1990) with a reframing of the kind of questions disabled people were asked under the medical model.

Medical Model: ‘Does your health problem / disability mean that you need to live with relatives or someone else who can help or look after you?’

Social Model: ‘Are community services so poor that you need to rely on relatives or someone else to provide you with the right level of personal assistance?’  
(Oliver, 1990, p. 7)

In considering different types of social accounting, where emphasis is placed is of central importance. On one side, a lack of external state support is assumed as a given. On the other, a lack of support is problematised. The form of social accounting provided here suggests that unpaid care is not simply an inevitable function of the existence of impairment but rather a damning critique of the priorities of a system based on profitability and capital accumulation. However, for the most part it is the “medical model” approach adopted in disability benefit application forms. Unfortunately, academics largely ignored these critiques of the medical model until the 1990s, since it was only at this point that “disability studies” began to proliferate (Barnes and Mercer, 2010). This weakness shows the importance of active engagement in the social world outside the academy but also of striving to disrupt current hegemonic understandings (Cooper et al, 2005) which up until that point were largely taken for granted.

In the context of the neoliberal assault of the last few decades, it is imperative that these issues are given sufficient attention. It is precisely in such a context where classic methods of division and stigma will be adopted, coupled with a refocusing towards the individual to deflect from systemic failures (Scrambler, 2004).

#### **8.2.4 A Political Economy of Disability**

As stated previously, whilst disabled people were stigmatised and derided long before capitalist development, it was only with the industrial revolution that the systematic exclusion from their role in production began in earnest. The need for capital to extract as much surplus value as possible had an important consequence since “those with impairments whose labour might have lower surplus value may be deemed unsuitable for certain work as they diminish profitability” (Bishop and Boden, 2008, p. 6). It is from this increased rigidity with the new mechanised factories and the increasing speed of much of the work that laid the material basis for subsequent exclusion. In this way, disabled people came to be looked down on as “useless” since they were seen to be unable to contribute to “the economic good of the community” (Barnes and Mercer, 2010, p. 28). In this way, disabled people are then cast aside by their “incapacity” and “unproductiveness” (Barnes and Mercer, 2010, p. 29)

Therefore, we can begin to see how whilst rooted in economics, there is a developing and constantly moving interplay with ideology which serves both to justify this oppression but also to reinforce it. Therefore, as theorists such as Oliver (1990) have suggested, appreciating this interplay becomes essential to understanding what is actually taking place.

It is thus, not difficult to see a potential link between this and the idea of “useless eaters” who deviated from “bodily perfection” used to justify the slaughter of 100,000 disabled people in Nazi Germany. Whilst this is obviously a particularly extreme example, the point is that the preceding ideology helped lay the foundations for what was to follow.

The pre-existing ideology surrounding disabled people was of them being “surplus to requirements” (Malthus, 1926) and this can be found replicated in social policy and the rhetoric of government actors. Consider, for example, the following quote from Winston Churchill who states in a communication to the Prime Minister in 1910 that “the multiplication of the feeble-minded is a very terrible danger to the race” (Brignell, 2010). Similarly, William Beveridge, widely held as the founder of the welfare state argued that:

...those men who through general defects are unable to fill such a whole place in industry are to be recognized as unemployable. They must become the acknowledged dependents of the State... but with complete and permanent loss of

all citizen rights - including not only the franchise but civil freedom and fatherhood. (Brignell, 2010)

They key point here is that for capital, disability is simply viewed as an additional cost which it is unwilling to absorb. Once people are not viewed as a reliable source of surplus value, or, once they cannot be effectively exploited, there is a direct link to the idea of seeing disabled people as a “burden”. In an excellent exposition of this logic, Bishop and Boden (2008) show how a Compliance Cost Assessment (CCA) was used to defeat the Civil Rights (Disabled People) Bill in 1994 which sought to prevent workplace discrimination and in providing goods and services. The CCA stated that the effects of passing the Bill would be a cost of some £17 billion up front and a further £1 billion per year in annual recurring costs. It was then assumed that if the Bill also established the right to equal pay, it would cost the private sector some £63 million to cover the “lower productivity” of disabled people. This was all combined with the other costs addressed in the CCA which included the “increased costs of recruitment, adapting the workplace, the costs of retaining staff who become disabled, the costs of finding out after an offer of employment that the person ‘cannot do the job’ because of disability and the cost of legal proceedings...” (Bishop and Boden, 2008, p. 11). All of this together resulted in estimated costs of £75 million per year for the private sector and £20.4 million for the public sector. The accounting logic had been effectively mobilised and the Bill was defeated. However, this came at a cost. The underlying logic of capitalism and the Ministers who supported it had been exposed and the scramble to regain legitimacy contributed to the future Disability Discrimination Act of 1995.

Moreover, whilst Bishop and Boden (2008) point out that much of the data involved merely “guesstimates” having little empirical validity...

For the disabled campaigners acting from a social model perspective, the issue was one of rights rather than costs [recognising that] an entitlement to receive human rights should not be attenuated by considerations of costs (p. 13).

In any event, despite the lack of empirical data to back up the costing arguments, presumably it would “cost more” from a capitalist perspective or it seems unlikely business lobbies would have opposed it so vigorously. However, given that much work today is not in the factory conditions of the industrial revolution, an analysis of whether any of these assumptions are valid seems worthy of merit. Put another way,

whilst the origins of disability discrimination in its current form may have stemmed from capitalist development, it is in the subsequent ideology this logic is reinforced, even once material changes have taken place. It would for example be possible that the assumption of “lower productivity” in all jobs at all times is perhaps as grounded in discriminatory ideology as it is material reality. Whilst the barriers almost always remain, there is a difference between the activities involved in some types of employment from production in a factory. Furthermore, much of the exclusion is a result of stigmatisation and lack of understanding from employers. The assumption of “lower productivity” is unlikely to distinguish between types of impairment (including mental and physical impairment) and the activities involved in the job since the question of how the environment can be made suitable for a disabled worker is often not even asked. Therein lies evidence of the discrimination – a blanket stigma which fails to ask what can be done to destroy the social barriers that prevent disabled people from carrying out certain work roles. Put simply, considering disability is seen as “extra work” and a “potential problem” pre-empting any serious discussion about disability oppression.

Moreover, with regard to manufacturing work and so on, whilst differing from Finkelstein’s (1980) theory of “Phase 3” and “inevitable progress” for disabled people with technological advances, a key point remains: The *potential* remains for technology to be used to make widespread alterations to existing workplaces, allowing access to a much greater variety of work.

As Bishop and Butler (2008) correctly point out what all this ignores is why disabled people may be “less productive” in the first place. It assumes an unchanging constant locating the lack of productivity in the inherent flaws in the body and not as a direct result of social barriers and inappropriate work environments.

What all this shows is the centrality of disabled people’s relationship to production and it does not end there. If someone works long hours, the combination of the physical and mental strain in the workplace is magnified and this obviously has a direct impact on the prevalence of many impairments. In addition, it is also likely to shorten a persons “working life”. This can then be coupled with the incidence of industrial accidents and the recent attacks on Health and Safety legislation by the Conservative government, which will also have a knock on effect on impairment.

From this, it is easy to see how social factors contribute to disability which is then reflected in increased care needs and the greater emphasis on unpaid care in a disabling society.

Meeting the needs of disabled people is not a priority under capitalism. Although not formulating the concept in exactly the same way, Stone's (1984) idea of the contradiction between a "needs based" and a "work based" economic system is a valuable one. As cited in Barnes and Mercer (2010):

The successful resolution of this problem requires rules...that do not undermine the primacy of the work system...[Since] the state viewed those claiming exemption to the labour market with suspicion...the link between medicine and "disability" is crucial as it provides a legitimate mechanism for separating "genuine" and "artificial" claims to sickness and impairment (p. 73).

These ideas can also be understood within Gramsci's concepts of consent and coercion with both being played out within disability politics. The economic needs of capitalism are always mediated by politics.

Therefore, to try and maintain consent, politicians and so on have to adopt a discourse which emphasises disability rights in the abstract since to do anything else is to expose the failings of the economic system they represent and its abject failure to meet social need and to provide genuine equality. As a result, in terms of direct scapegoating, politicians and the media do not launch direct attacks on disabled people per se as this would be hugely unpopular. Instead, the coercive apparatus of the state is employed by shifting the goalposts. The question becomes one of who is "disabled enough" with those not deemed eligible seen to be "scroungers" returning us to notions of the "deserving" and "undeserving" claimant.

This is evidenced both by the attempts to remove people from Incapacity Benefit<sup>29</sup> and the use of private firms like ATOS to tighten the criteria, removing many who were previously deemed "genuine" (Gentleman, 2011a; 2011b)

This is classic divide and rule since people who feel anger at the obvious injustice are directed not at the government or social barriers but towards other claimants – the "other" who is ranked on the new scale of disability. Therefore, whilst in general the

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<sup>29</sup> Note how you, the disabled person, are "incapacitated" – a clear reflection of the dominance of the "medical model" approach even today.

attack on disabled people appears to be superficially indirect, in practice the idea of targeting those “worst affected” is profoundly discriminatory since it suggests the state has no responsibility to provide support for a vast number of disabled people throughout the UK. It also goes without saying that once you narrow the boundaries of what is considered “disability” you, in turn, eliminate the perception of need for recognised care or carers.

This section has sought to examine why disability discrimination continues today and the existing approach towards it. The next section will examine how carers’ role has developed alongside the changing context of disability and disability theorising.

### ***8.3 Towards a Political Economy of Carers***

#### **8.3.1 Introduction**

This section will attempt to explain carers role in society are how they are perceived by the capitalist state. To do this, it will briefly outline social policy towards carers from world war two. Whilst recognising the gains in terms of legal recognition, it will also highlight some of the limitations of these highlighting the difference between legal rights and material reality. By examining the legal texts regarding the Carers Allowance (then Invalid Care Allowance) it will be shown that the intention was not to provide financial support to carers and that, in fact, the government was aware that the changes would not financially support carers in the great majority of cases. In addition, it will also argue that we cannot dislocate carers from their class position since clearly access to greater resources has a large bearing on the kind of support which may be available. It also seeks to problematise the concept of personalisation and the related idea of “care in the community”, terms which have often used the language of the social model of disability to obscure the systematic lack of resources or political will to achieve it in practice.

#### **8.3.2 Care and Social Policy after WWII.**

Some authors claim the changes in informal care with the development of the welfare state are overstated (Horden, 1998). However, we must draw a clear distinction between the correct idea that the shift towards care provision by the state was never total and was never intended to be (as evidenced in Chapter 5 of this thesis) and mistakenly suggesting that no significant change took place. The subsequent politicisation of the caring role, is, for example, hard to imagine without the ideological impact of the notion of a states responsibility in meeting peoples care needs and the corresponding effect on what was deemed “natural” or expected for women in the family.

Another sense in which the Second World War changed perceptions was in the significant undermining of eugenics after the full consequences of this ideology were laid bare for all to see with the horrific execution of hundreds of thousands of disabled people (Turner, 2010). In research into learning disability, Turner (2010) explains that partly in response to this, in 1946 campaigns began for “care in the community” alongside growing unease about segregation leading to the formation of the National Association for the Parents of Backward Children (NAPBC), later formed in Scotland as the Scottish Association for the Parents of Handicapped Children (SAPHC) in 1954.

Clearly, the use of the term “backward” shows that the political context in which care took place meant that the terminology used with regard to disabled people was not at all progressive. Whilst segregation was correctly challenged, the care movement was itself partly a product of its ideological surroundings.

It is interesting to note that the term “carer” only really came into more general usage after the 1960s. From this, it is valuable to note the coincidence of timing of the formation of the National Council for the Single Woman and her Dependents (NCSWD) founded by Reverend Mary Webster in 1965 and the radical backdrop of the feminist and civil rights movement which was emerging at roughly the same time.

Similarly, much of the legislation regarding carers only came after this period as can be seen from the table below. It is important at this point to remember that in the 1960s there was no tax relief or allowance payable to carers.

Year	Legislation	Description



1971	Attendance Allowance	Payable to disabled people requiring constant care at home.
1976	Invalid Care Allowance	The first amount payable to carers themselves. However, this was limited only to single women.
1985	Extension of Invalid Care Allowance	Extension of ICA to married and co-habiting women.
1986	Disabled Persons Act	Requirement of Local Authority to consider carers ability to continue in their caring role.
1990	NHS and Community Care Act	Formal recognition of "Carers"
1995	Carers (Recognition and Services) Act	Formal right to assessment for carers regarding their ability to care.

(Source: Carers UK website)

However, whilst clearly there has been a shift towards legal recognition which should not be understated, given the problems mentioned in Chapter 6 on Carers it is important to ask whether there is a cynical motivation on the part of government policy makers. Many of these changes have taken place against a backdrop of neoliberal reform and one thing that carers will be acutely aware of is where there have not been substantial changes for more than 30 years, namely, the financial support made payable to the carer. Whilst the introduction of the Invalid Care Allowance was clearly a step forward, the subsequent recognition is arguably more important in speaking the language of change, whilst limiting any concrete actions to improve the situation.

It is thus reasonable to ask whether this simply represents cynical costs cutting rather than a genuine attempt to achieve “care in the community”. This point has been explicitly recognised with some authors stating that community care was...

...stimulated partly be a reaction to the horrors of institutional life and partly by the belief that community care is a cheaper solution (Borsay, 1986 in Turner, 2010, p. 240)

As can arguably be seen in the example of “free personal care” and with increased speed of hospital discharge, it seems possible that the transfer of responsibility to local authorities more generally has not been matched by the financial resources to carry them out.

In this way, what began as a justified attack on the segregation of disabled people has to some extent been driven towards a justification of cost cutting and a reinforcement of neoliberal practices.

The next section will attempt to explain how questions of recognition and carers relationship to labour influence the economics of care.

### 8.3.3 The Political Economy of Care

#### “Recognition”

To begin with, it seems fair to recognise a few general points about capital and its relationship to carers. Given that it is not directly involved in surplus value production, it is systematically undervalued as an activity, thus echoing much of the feminist critique of housework and child care.

A parallel experience is found in Venezuela where Article 88 of the Bolivarian Constitution takes a rather different approach...

The State guarantees equality and equity between men and women in the exercise of their right to work. *The State recognises work in the home as an*

*economic activity that creates added values and produces social welfare and wealth...*<sup>30</sup> (emphasis added)

Although this relates more specifically to housework, they receive some 80% of the National Minimum Wage, whilst in the UK Carers receive less than 30%.<sup>31</sup> Whilst this does not problematise capitalist social relations, it does show the different approaches that can be taken within different capitalist states.

The origins of Invalid Care Allowance (ICA) are a useful example of the logic behind government policy makers' decisions with regard to carers. With respect to what is deemed care and who is classed as legitimate claimants we are informed that:

Given the degree of disablement that has to be shown in the patient, it is likely that the statutory authorities have accepted any period in which the claimant is present for the purpose of company and supervision, as well as actual assistance, as qualifying. (Social Security Contributions and Benefits Act 1992, Derivation s. 37, SSA 1975 cited in Bonner et al, 1997, p. 166,)

In this way, we can see that from a government perspective, the disability qualification is deemed sufficient in terms of recognising care. Of course, the limited definition of disability then becomes an issue. As pointed out in Ogus and Barendt (1978), the original Act providing ICA was limited to care for a "severely disabled person" (p. 179). From this, we have the potential for a double injustice. First, in the non-recognition of impairments not deemed to be "severe" and then in the subsequent non recognition of the carers themselves. In this way, it should be obvious that the role of carers in a capitalist economy is very closely bound up with the role of disabled people more generally.

In trying to explain the purposes of the benefit Ogus and Barendt (1978) state that:

A household...may suffer from financial hardship not only directly through the needs of the invalid but also from the sacrifices made by other members of the household in looking after him (Ogus and Barendt, 1978, p. 179).

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<sup>30</sup> <http://www.venezuelaemb.or.kr/english/ConstitutionoftheBolivarianingles.pdf>

<sup>31</sup> Based on the minimum 35 hour week to get Carers Allowance, which is £55.55 and where the NMW of £6.08 is multiplied by the equivalent full time hours.  $£55.55/212.80 = 26.1\%$

They then go on to cite that care “[would] frequently...involve a complete or partial interference with the relative’s own earning potential” (p. 179). Similarly, we are informed that:

Quite apart from the social justice of compensating such persons, the granting of state financial support also made economic sense. In many cases, the care supplied voluntarily by the individual involved a saving on public facilities which would otherwise have been necessary. (Ogus and Barendt, 1978, p. 179)

To reinforce this, in a section on the qualifying criteria of not being in “gainful employment”<sup>32</sup>, it is pointed out that “the majority of persons benefiting from the new allowance would already have been in receipt of supplementary benefit” (p. 181).

Indeed, as Evandrou and Winter (1993) explain only 2% of all carers in 1988 actually received the ICA and in any event, they go on to state that “Given the objectives of its introduction as an earnings replacement benefit, it is questionable whether ICA meets these aims” given the size of the payment itself at £24.75<sup>33</sup> standard rate (p. 56). Therefore, since this seems to reflect the findings in the current research, carers cannot really be considered direct recipients of a “social wage” at least as it relates to the payment of a Carers Allowance. Similar to today’s carers’ allowance, the original allowance also contained complex rules about eligibility, many of which remain largely unchanged. One of these was in relation to employment to which we now turn.

## Employment

The intention being to confer benefit only on those engaged full time in the care of the invalid, it was thought appropriate to have some form of earnings rule...(Ogus and Barendt, 1978, p. 181)

With respect to the notion of “gainful employment” it is then pointed out that initially policy makers thought ICA could have taken all earnings into account but as the economic transfer was very limited in any event this was not followed through (Ogus and Barendt, 1978).

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<sup>32</sup> Dictated by not earning above a certain amount after the deduction of expenses.

<sup>33</sup> Taking into account inflation, this amount is roughly equivalent to the payment today. Calculated as £58.66 in today’s terms which is very close to the current carers allowance of £58.45.

In formulating policy, the government were very much aware of the likely impact on employment, particularly for those involved in providing greater amounts of care (Evandrou and Winter, 1993). Indeed, as the authors show by looking at the 1985 General Household Survey, carers were less likely to be employed with a 64.5% employment rate compared to the non carer population of 70% from 1985.<sup>34</sup>

Furthermore, they were also more likely to be involved in part time work and to have a lower income (Evandrou and Winter, 1993). More recent research, however, has shown a much larger number out of employment with 62% (Carers Scotland, 2012) for Scotland and 50%<sup>35</sup> for the UK as a whole (Carers UK, 2009). This could either be a reflection of the ageing demographic with many carers now past retirement age or the accumulated impact of cutbacks which make it harder to work and care at the same time.

There is admittedly a lack of detailed analysis on this question, but what we can say with a degree of certainty is that carers' relationship to the means of production is not fixed. Some will work part time, some full time, some will not work and others may move into or out of work as a result of their caring role. It is worth noting that Carers Allowance is less than the amount for Income Support or Job Seekers Allowance, implying a primacy of "actively seeking employment" over the caring role performed.

#### The Value of Care

From this, however, it should be stated that although carers clearly often work at the same time, this in itself is not sufficient to elaborate on their role as unpaid carers and how this service is viewed by the capitalist state. Part of this discussion about care takes place in the context of personalisation. We must then ask to what extent care itself is a commodity. In the case of health services more generally, there is no tangible physical commodity as such. We cannot separate the usefulness of the care services provided from the process itself, that is, the labour exerted in carrying out the caring role. Or as Marx (1976) puts it "the product is not separable from the act of producing" (p. 1048). However, this does not mean that services are not subject to extracting surplus value as Marx explains.

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<sup>34</sup> These figures were derived from aggregating the data provided in Evandrou and Winter (1993, p. 19).

<sup>35</sup> The report cites the 2001UK Census which states that roughly 3m people care and work at the same time. This is from a carer population of roughly 6m.

On the whole, types of work that are consumed as services and not in products separable from the worker and hence not capable of existing as commodities independently of him...are yet capable of being directly exploited in capitalist terms... (Marx, 1976, p. 1044)

However, the applicability of care as a commodity rests on the social relations pertaining to said labour. As Marx outlines:

A singer who sings like a bird is an unproductive worker. If she sells her song for money, she is to that extent a wage-labourer or merchant. But if the same singer is engaged by an entrepreneur who makes her sing to make money, then she becomes a productive worker, since she produces capital directly. A schoolmaster who instructs others is not a productive worker. But a schoolmaster who works for wages in an institution along with others, using his own labour to increase the money of the entrepreneur who owns the knowledge-mongering institution, is a productive worker (Marx, 1976, p. 1044).

Similarly,

It is possible for work of one type...to be performed by the same working man either in the service of an industrial capitalist or on behalf of the immediate consumer. He is a wage labourer or day labourer in either situation, only he is a productive worker in the one case and unproductive in the other, because in the one he produces capital and in the other not. (Marx, 1976, p. 1045).

Therefore, care conducted within the home would not be a commodity under this condition, regardless of the benefit conferred by the person receiving the care. Similarly, this also holds even in a situation where a self employed care worker enters into a direct relationship with the carer or person being cared for receiving an hourly wage in return, as might be evidenced under personalised care services. In a very loose sense, the exchange value of the care (that is, its exchange for cash payment) would mean care is a commodity in the sense only that it is related to the "care market". However, in neither case is the ultimate goal the generation of surplus value. Therefore care would only technically be a commodity once it is provided by care workers on behalf of a profit making enterprise or body. In this sense, care provided by unpaid carers is not a commodity. However, this should not be confused with the argument that this unpaid care is not "useful" to capitalism.

This caring role can be seen by capital as reproducing capital relations through reinforcing the familial norm and minimising potential social unrest. Whilst this caring role could also be seen as “indirectly productive” in Marxist terms since it helps to provide for a healthy workforce, this is contradictory. For one thing, capital views disability as a cost to be minimised and for longer term impairments, disabled people are largely seen as external to the productive sphere or a greater cost to capital and thus are effectively deemed worthless. Ensuring that people with long term impairments have sufficient health care provision would thus not be a priority in such a scenario. Therefore, it is unlikely that care would be valued either. This is coupled with the finding from Carers UK (2008a) that, on average, carers retire some 8 years early, thus reducing the carers average working life and removing more people from the “productive” sphere.

In terms of the benefits of unpaid care to capital, it has also been widely reported that carers save the Scottish economy a great deal, with estimates reaching up to £10.3 billion per year (Carers Scotland, 2012). However, in theory, from the point of view of profitability and surplus value creation, it would be cheaper to have this carried out by state funded waged care workers in a care home setting since this allows a reduction in the number of carers relative to those requiring the care. In theory, this allows more people (who might have been unpaid carers) to more readily enter the labour market to be exploited (Bruegel, 1978; Harman, 1984).

However, this would pose two problems for the capitalist state. Firstly, the boost to surplus value in terms of state provision is only possible if there is a need for workers in a context of full employment. In short, there needs to be profitable work for the new entrants into the labour market to carry out. It should be fairly obvious that as unemployment approaches three million in the UK, there is already a sufficient pool of reserve labour to hold down wages. More than this, however, even without encouraging more people to actively seek employment, capitalism already cannot absorb those seeking full time work as it is. This is a result of the tendencies explained in chapter 3 as machines gradually replace paid wage labour globally.

A related point is the idea of it being a long term saving to invest in more care now to prevent those with care needs simply moving into a care home when the carer can no longer cope, which would prove more costly to the council. This is based on two assumptions. Firstly, it assumes that those who are entering the care home have no

assets of sufficient size which would be expected to fund the care costs. Secondly, it assumes that moving the person being cared for into a care home would actually happen in the absence of greater respite and support. In this sense, this “saving” may not be realised. Even if people are fortunate enough to have someone to share the caring role with, so long as people continue to provide unpaid care long term regardless of the effect it has on them, the care home alternative is only a hypothetical scenario. This is not to say that this does not or cannot happen but simply that it may not happen often enough to justify greater investment in care packages from a budgeting perspective. Therein lies the difficulty. In assessing this, councils are comparing a more tangible up front short term cost of employing more staff versus a less tangible potential saving of 1) preventing people entering care homes 2) the savings associated with preventing carers acceleration towards needing a care package themselves. Most importantly, however, the impact of the current phase of capitalist crisis and the substantial funding cuts to councils funding in these areas make it extremely unlikely that councils would want to meet the up front short term costs even if they were certain it would provide a longer term saving unless they were forced into doing so.

However, regardless of the widening consensus on the value of care (however well motivated), clearly this is not the whole story. We must consider how this whole process is mediated by politics. For most people in society, the idea that disabled people and the people who care for them are not supported is abhorrent. Therefore, the government will always pay lip service to the idea that “unpaid carers” are valuable. They recognise that without a commitment to expanding provision, the alternative to people continuing to care is an increase in the already widespread lack of support for disabled people. This would increase the crisis of legitimacy, where, at least, in formal legal terms under “liberal democracy” disabled people have the same rights as anyone else to access employment, education and overall, a decent quality of life.

In this context, therefore, *the government at present has health care provided more cheaply and so long as there is no widespread dissent will see little reason to change the existing setup.* This helps to explain why, rather than focusing on the discrimination disabled people already face, they claim “scroungers” are “taking advantage”. Therefore, carers are not directly attacked in terms of government propaganda but by proxy through association with the existing discourse of distrust aimed at those not in the labour market.



Carers' relationship to employment is thus very unstable and fluid and this seems to fit well with the neoliberal orthodoxy of flexibility. For capital, placing carers in a situation where they are economically driven to the labour market to have a decent standard of living whilst also carrying out their caring role, achieves the best of both worlds since carers often attempt (and want) to do both. In addition, given the "gainful employment" clause, they are arguably encouraged to do part time, often low paid work so as to also maintain the carers allowance and maximise income. There is also the added advantage that for the purpose of unemployment statistics, they do not show up since they are not necessarily "actively seeking employment"<sup>36</sup> as a result of their caring role.

Whilst this area could benefit enormously from future research, one key point remains. Although carers may not have *economic* power to withdraw their labour as a result of their caring role, they certainly have *political* power. There is clearly the potential for a united mass campaign for disability rights, for women's rights; for the rights of the carer and for the defence of the welfare state. As the debate about care continues to permeate the media, the ability to link with trade unions and combine these issues will be paramount.

This section has sought to look at the way in which capital benefits from the existence of an army of unpaid carers. The next section will look at how the idea of "choice" within health care is a political tool used to justify privatisation and attempt to shift responsibility away from the state.

#### 8.3.4 The Market in Care and the Limits of "Choice"

##### Residential Care

Unlike the original legislation (Ogus and Barendt, 1978) carers do not see their caring role as a choice, as simply a "voluntary" relationship outside of any wider context. One reason for this is that they feel pressured into seeing it as a moral duty, thus echoing the arguments in the "Unpaid Care and the Family" section later in this chapter. Of course, you cannot separate this from the justified perception that without their care the lack of service provision means that the disabled person will simply remain isolated

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<sup>36</sup> Carers are not expected to be looking for work if they are classified as caring for 35 hours or more.

and suffer deterioration in their overall quality of life. Moreover, it has been reported that of those new to caring, 42% of people being cared for are reluctant to use external care services. (Carers UK, 2007c).

It is also important to recognise that the whole focus on “care” and “caring” itself can present the disabled person as a passive object who has “care done to them” (Barnes and Mercer, 2010). Given that the goal for both the disabled person or the person being cared for and their carer is presumably to both have the highest possible quality of life, we cannot abstract the carer’s experience from that of the person requiring care.

One option is to use residential care or other institutions. However, Barnes and Mercer (2010) speak of the commonality of the “warehousing approach [which] concentrates on prolonging physical life and diversionary and passive activities, while largely denying significant outside social contracts and activities” (p. 131). Given this isolation, understandably the disabled person may well be reluctant. The lack of services available may make this effectively an enforced move if the carer is unwilling or unable to provide support.

In any event, the prohibitive cost of many care homes of £25,953 for even a single room in a private residential home (Ross, 2011) makes this financially impossible for many. Whilst there is some financial support towards the costs of a care home under certain circumstances, the majority of the costs will still be borne by the disabled person or the family themselves.

#### “Care in the Community” and Personalisation

The move towards “care in the community” and local authority provision has long been problematic. The mismatch between the government rhetoric and the funds actually provided seem to be significant. From this and the problems already outlined with “free personal care”, one solution proposed has been the use of “personalisation” or “individual budgets” where the disabled person can have their own private budget which they manage by either directly employing a “personal assistant” or by a suitable proxy. Whilst initial enthusiasm for this makes perfect sense in a context of disabled people having almost no control over their own lives, very real problems have already emerged.

The Carers UK (2007d) monthly magazine *Caring* in their section recording phone enquiries “From the Line” shows some of the problems of this project of rolling out the “free market” to personal care assistants who are often ununionised.

It will also become harder to recruit and retain good workers when they are paid only a bit above the minimum wage for doing such a physically demanding and skilled job. (p. 7)<sup>37</sup>

What this transfer of responsibility seems to also achieve is that if service quality subsequently declines, the government can then claim that it was your own choice which led to the problems. Moreover, it is unclear why carers or the disabled person should have to deal with the increased paperwork and the difficulties involved in recruiting personal assistants.

Furthermore, the idea of commodifying the care relationship has been explicitly recognised (Watson et al, 2004) since it changes the situation from one of a public service ethos to one of an employer/employee relationship where regardless of the intentions of the disabled person/ the carer or the employee, they appear as adversarial. For the “employer”, the “personal assistant” can appear as a cost to be minimised perhaps to ensure a greater number of hours of care. Similarly, for the “personal assistant”, there are serious questions over what options you have if you are sick, if you receive less than the minimum wage, discrimination or ill treatment at work or of contradictory information given to you by the combination of the disabled person, the carer or their family (Unison Scotland, 2009).

Whilst some have commented that the rights of workers contradict the needs of the disabled person, it is unclear how the movement towards ununionised, low paid workers employed on a short term basis provides any long term improvement in either the situation of the disabled person or the carer. Whilst it is true that the emphasis placed on the “social model” of disability is very pronounced within the personalisation drive, the reality may be quite different.

The problem of the idea of the emancipatory potential of personalisation is that relying on the free market in this way is counterproductive to the interests of disabled people. If we roll out the free market to all aspects of life, what is to prevent an extension of the completely disposable, flexible cheap worker being transposed onto a wider attack on

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<sup>37</sup> Indeed, this consequence is evidenced in Interview 2 where the carer finds exactly this difficulty.

disability rights, whereby disabled workers are seen by other employers as too costly or cumbersome to be practical?

Part of the success of this programme from a governmental perspective is that it has been partially able to drive a wedge between workers, carers and disabled people making it appear that each has different fundamental interests. We would do well not to play into these created divisions.

Ultimately, people surely want good quality support and disabled people a greater amount of control over their own lives and not to be made “dependent”. The underlying assumption through all of this is that public services could not provide the same level of support. Surely, a system whereby the required care desired was granted, with suitable contingency planning for sick leave and so on could dramatically improve the situation. The problem is that a movement towards better meeting the needs of the disabled person is not how these processes are carried out in practice since the people who genuinely want this are not in control of their workplace or community. The whole debate about personalisation is that it is presented as the only way this level of autonomy can be achieved instead of realising that the barriers are political.

The other danger is that once you have undermined Social Care Workers and the various departments within a given local authority, what stands in the way of the government removing funding or focusing once more on only targeting the most “severely disabled” with the result being far less provision overall?

Whatever the initial outward appearance of these changes, the long term trend seems likely to be for people to gain access to support only on the basis of their own personal income threatening the whole concept of an NHS “free at the point of entry”.

What this also achieves is the rationalisation of paying for your own services in the care market, paving the way for service provision to be based even more on income and not social need.

#### Social Class

Another important part of this is the extent to which “choice” is dictated by the financial situation of a given carer, although this has been contested. Horden (1998), for example, states that “...extra-familial support does not wholly take over. Nor are

those who benefit from it drawn from any well defined economic group” (p. 27). It is true that middle class people are better able to access support since they are more likely to assert their right to complain, or, more broadly benefit from their enhanced “cultural capital” (Hastings and Matthews, 2011). However, what Horden’s statement misses is that even if people from all backgrounds *use* the service, this in no way appreciates that the richer you are, the more likely you are to have the separate option of privately funded support if cutbacks are made. This is not to even mention the costs of buying equipment and any other adaptations to the environment that can make it less “disabling”.

More than this, research carried out by Carers UK (2008b) in their paper “Carers in Crisis” shows that some 66% spend their own income or savings to pay for care support and some 49% have cut back on caring support including extra breaks, equipment, services or supplies since they cannot afford them.

It seems clear that both carers and the disabled people they care about are severely disadvantaged by their inability to access the market.

This section has attempted to explain carers role in society are how they are perceived by the capitalist state. To do this, whilst recognising the gains in terms of legal recognition, it argued for appreciating the difference between formal legal rights and what happens in practice. In addition, by examining the legal texts regarding the Carers Allowance (then Invalid Care Allowance) it was shown that the intention was not to provide financial support to carers. Furthermore, it also sought to problematise the concept of personalisation and the related idea of “care in the community”, by contrasting the language of the social model of disability often used with the systematic lack of resources or political will to achieve it in practice. The next section will attempt to explain why the overwhelming majority of unpaid care takes place within the family unit.

## **8.4 Unpaid Care and the Family**

### 8.4.1 Introduction

In terms of the immediate research we are considering, the question of the family arises in two key ways. To begin with, unpaid carers carry out this role overwhelmingly for other family members. The lack of adequate provision in their absence is central. In addition, the interviews suggest that both the carer and the disabled person are sometimes resistant to anyone else carrying out this role. Of course, one part of this could just be that it's all the people involved have ever known. If, for example, you have looked after your mother for 20 years, the idea of another scenario may seem very distant. Therefore, to some degree, people have been socialised into feeling this caring is effectively a given. This is partially evidenced by one carer explaining that the 3 people she cares for is "just what you do". The mismatch between the expectation of family life (in media and government caricature) and the reality arguably make the whole process much more difficult since it feels more like a personal failing in some way.

However, we must try to understand why family members feel a "duty" to carry out this role ("duty" was how the carers themselves described it) and why they, or the person they care for, may feel uncomfortable with others carrying it out instead. In this respect, it is of central importance to look at the role of the family, how people relate to it and whether and to what extent the ideology of the family differs from the reality.

#### 8.4.2 Happy families?

To begin with, the positive associations people have with the family need to be considered. Under capitalism and in the absence of obvious alternatives, without family the options are going into care or even ending up homeless (German, 2007). Therefore, we need to understand the material reasons why the family structure may at times be seen as preferable. For many, the family is seen as a protection from a cruel world outside; a place where you can get unconditional support and people to turn to when times are hard.

A family represents love, security and certain values even if, in reality, one's own family is mean minded and distant. Families also have wider meaning as a cohesive force. They connote responsibility; especially towards the very young and the very old. People believe that families are the group of first and last resort. (Fogel cited in Leslie and Korman, 1985, p. 13)

Some even see the family as a model for a new type of society with it being seen as the nucleus or a “centre of caring, altruism and egalitarianism” (Morgan, 1985, p. 59). None of these desires or wishes are controversial so long as this is not about the complete denial of self as so often happens with women and those providing unpaid care. However, the point here lies in the assumption that the family is the best place to achieve these aims and why it should be the case that your connection to people starts and ends with blood ties or conjugal formalities.

Of course, the idea of support and solidarity within the family rings partially true. However, the idealisation of the family is supported by a sophisticated ideological apparatus. One element of this is positive reinforcement with the constant bombardment of happy families on television screens and the conclusion of countless films where an image is presented of family life that is impossible to achieve in practice. Another element, however, is negative reinforcement through comparing the family (and the family home) to the “cruel” people outside. This can take various guises (the fashionable one is “neds”) but the point is the same. It serves to undermine a wider sense of solidarity and sow distrust among the very people who could potentially challenge social injustice and inequality. Central to this is the idea of starting from a position of suspicion with regard to those who are outside your immediate circle. The idea of “never trusting a stranger”, for example, is intensely ideological. The way police statements constantly focus on violence as something that happens outside of households belies the reality that a majority of violence takes place within the home, including rape, which still goes overwhelmingly unprosecuted.

Another ideological weapon is the theory of the “nanny state”, which taps into a justified belief that the state plays a coercive role in terms of screening and monitoring benefit claims as well as the role of social workers. However, this can feed into a much wider distrust of public provision more generally. This ideology best fits with the Tory ideal. As explained by Morgan (1985):

The family is seen both as a more desirable substitute for the state in all matters of care (for the aged, the sick and children) and as a private haven, a bulwark against the encroachment of a potentially totalitarian state. (p. 60).

Or, to put the same point another way...

If the family stands for all that is authentic, warm and personal, the state seems to stand for all that is abstractly bureaucratic, cold and impersonal. (p. 62)

Morgan (1985) goes on:

Social work...interventions often lean strongly in the direction of social control rather than in the direction of welfare (p. 62)

Since the provision of welfare and the repressive apparatus of the welfare state as a whole are difficult to separate, this view, despite its conclusion being the destruction of public provision has some grounding in peoples experiences – strict monitoring and what is seen as greater intrusion into peoples lives. Tied to this, in trying to understand and critique the role of the family, you quickly come up against a moral backlash. As a result of the previously mentioned division between the family and “the world outside”, the ideological hold is particularly strong here. To counter this, it would make sense to consider some brief facts about the reality of family life.

Firstly, domestic violence is the greatest cause of ill health for women aged between 19 and 44 (German, 2007). This is despite what Edwards (1989) has recognised as the systematic underreporting of domestic violence by police. Secondly, child abuse is far more likely to take place within the family, with the NSPCC stating that 80% of child murders in 2002 took place within the family (German, 2007). Moreover, 2 women are killed per week by partners or ex partners representing some 50% of female murders (Orr, 2007). Not only this, but rape in marriage was only made illegal in the UK as late as 1994 (i.e. less than two decades ago!) showing clearly how women have and continue to be seen as objects owned by their husbands who can do what they please to their property. Furthermore, current partners account for 45% of rape with strangers accounting for only 8%. (Orr, 2007)

None of this suggests that the family is anything like the ideal presented to us and as outlined in the section on the socialisation of women, this can have serious psychological consequences. Therefore, we must ask the question of why if the ideal is so different from the reality people still cling to it. To answer this, we must look to the role the family plays under capitalist production.

As Leslie and Korman (1985) point out, one of the key roles is reproduction – that is the care for and training of future workers. As carers will understand, this is far cheaper



than providing a universal service. More than this, it plays a key socialisation role (Morgan, 1985; Leslie and Korman, 1985) or perhaps more broadly, an ideological one. The ideals of “obedience, conformity, discipline and subservience” are all part and parcel of family life (Morgan, 1985). This is tied to the fact that for capitalism to maintain itself brute force alone is not enough as it is not a reliable means of control. In this way, what happens is not just that people do not want to break rules (e.g. challenging private property) but that for the majority it does not even occur to them (Leslie and Korman, 1985). This internalisation of “moral norms” shows how effective this ideological role is since it is not seen as ideology at all.

However, perhaps the key role of the family is that of atomisation – of splitting society into separate units each apparently with their own set of interests. This individuality also connotes a sense of responsibility between those in each unit (Morgan, 1985). This is absolutely key, particularly in a context where the state has gradually abdicated responsibility. In this way, the blame is shifted away from governments and an economic system that does not provide to the individual unit expected to meet all of society’s problems within its four walls. This is also reinforced by the fact that domestic life is often far more conservative than the economic sphere. For example, whilst people may openly complain about their workplace, they may be less willing to talk about problems they have at home. One element of this is a sense of familial and personal pride (or fear of shame). The idea that “it’s our problem and we’ll deal with it” is a common sentiment. The consequence of this is that whilst peoples own experience may not meet the idealisation of the family of television mythology, since everyone only shares the positive aspects of their family life, everyone believes it is only them who has negative experiences. This is then written off as either their own fault or that they were just unfortunate in their allocation of partners or family members.

The constant mention of “hard working families” by politicians is particularly perverse. This serves to do two things.

- 1) To take advantage of the positive connotations linked to the family and the notion of solidarity and companionship.
- 2) To encourage the view that whilst your family may be doing everything possible to contribute to society, there are “others” who do not and who are thus not deserving of support or empathy.

Wider social problems are thus laid to one side to place onus on those who “work hard” and those who do not. It really is not a far cry from Thatcher’s notion that there is no such thing as society, only families and individuals.

So here we see how the family and the notion of “family values” are used to divert from the faults of the capitalist system. The idea of “social decay” is commonly used to scapegoat families. One example of this is cited in Morgan (1985) who explains that the UK riots in 1981 were blamed on the family, with the key factors being the notion of parental responsibility, the wife as the primary carer and anti social behaviour simply amounting to “problems at home” stemming from “broken homes” ( p. 80). Much of this will seem familiar to anyone examining the dialogue following the 2011 riots which started in Tottenham after the police shot Mark Duggan dead without provocation.

The irony of this of course is that if the government were serious about giving people more time with their children they could reverse the UK’s position of having some of the longest working hours in Western Europe. Of course, this is not forthcoming.

With respect to unpaid carers, the message seems clear. The sense of duty underpinned by positive ideals of empathy, solidarity and compassion are brutally exploited. Unlike paid carers they are not going to withdraw their care and the often isolating experience of unpaid care serves to further divide society up into separate units. The question of what would happen without these carers is thus often not even posed since ideology ensures that it is taken as a “natural” familial given with women’s role in the home reinforced yet further.

### ***8.5 Summary***

This chapter countered the simplistic explanation that there are simply too many people with care needs because of an ageing population. Instead it argues that the prevalence of unmet need and the growth in unpaid care is intimately tied up with disability discrimination and the role of the family under capitalism.

The section on disability examined the source of disability oppression today. Here, it was held that the dominance of the “medical model” was central and that ultimately under capitalism disability is viewed as an additional cost to capital. Government

actors often use disability classification to serve as a method of divide and rule since it provides a seemingly neutral way of separating out the “deserving” poor from the “undeserving” poor. Once successful, the government can then narrow the scope of what is deemed “disabled enough” euphemistically called “targeting support at the most vulnerable”. Importantly, an argument was then made that we cannot effectively understand care without understanding disability oppression.

The next section then showed how the very concept of carers as a more widely used term was located in the radical context of the protest movements of the 1960s. It sought to show how formal legal changes have not been reflected in additional financial support. Rather, it argues, this was the intention and recognition from the beginning since policy makers were aware many were already receiving some form of supplementary benefit which would not be added to any new carer benefit. Again, it was held that since the caring role itself is not directly involved in the process of surplus value creation, the role itself is not valued under capitalism. However, the caring role was seen to be a vital one. First of all, it fits with the neoliberal notion that families should provide for themselves thus shifting the onus from government actors. Secondly, it reinforces the idea of the family ideal which is vital in minimising potential social unrest. Finally, it also reinforces the idea of flexibility since many carers work part time and this allows for the greatest possible flexibility of labour, whilst simultaneously ensuring that individuals provide as much care at home as possible representing minimum cost to capital.

This section also looked at how rather than being viewed as a “voluntary” free choice carers enter into, it is instead a mixture of moral duty and economic conditions. The combination of the lack of available services and the costs of paying to have the care provided mean that short of accepting a poor level of provision, carers really have no choice in this respect. Or at least, the choices people do make are severely curtailed and influenced by the underlying structural conditions and the impact of ideological beliefs within society as a whole.

Furthermore, the ideology of “care in the community” was seen as a realisation that whilst the critique of institutions was legitimate, it also sat well with neoliberal ideals of cheapening the costs of care provision. The use of personalisation in this context thus serves to obscure our common interests and to completely refashion the relationship between the disabled person, the carer and the paid care worker.

The last section then critiqued the idealised conception of the family. Whilst recognising why this takes place, the family was shown to allow atomisation between different family units, is often violent and destructive and serves a key role in socialising the next generation of workers into “moral norms” of conduct which are acceptable to continuing profitability and capital accumulation. Furthermore, after the riots which started in Tottenham in 2011, it should be obvious that the family is also a convenient scapegoat for wider social questions of unemployment, alienation and lack of opportunity.

Having attempted to provide a social accounting for unpaid care, the next chapter will now look at providing some tentative conclusions and recommendations arising from the research.

## **Chapter 9: Conclusions and Recommendations for Social Accounting for Unpaid Care**

In choosing unpaid care as a topic, a decision was made to focus on a contemporary issue of relevance to people's everyday lives. In attempting to provide a social accounting for unpaid care in Scotland, this thesis represents theoretical preparation for future attempts at social accounting. In this way, it seeks to redirect attempts at academic engagement using some of the lessons that could be drawn from this attempt. This chapter seeks to explain how Marxism has informed the attempt at social accounting and how this differs from previous attempts. These insights are then used to provide some recommendations as to how carer campaigns may be effectively mobilised.

### 1) Disclosure is not enough

Clearly, the other social accounts, whether that be the Care21 report or the numerous examples cited from Carers UK and Carers Scotland are very useful. For one thing, they highlight the difficulties carers face in a generalisable way with the sample size lending credibility to their findings. This gives it a great deal of weight in media discourse.

Given these introductory remarks, it is perhaps best to think of these attempts at social accounts as part of a "liberal humanist" framework. Here, text can stand alone without historical or contextual analysis. In this way, arguably disclosure can be seen as an end in itself. Showing up the poverty and suffering carers face is clearly an advantage given the misleading stream of information about benefit fraud and so on. However, it does little to give any indication of how the situation we find today can ever be any different, thus potentially encourage disempowerment. Without historical analysis, we run the risk of believing in an unchanging human nature. This is ironic given that without the NHS and feminist struggles, people may well have been rather indifferent to people spending large amounts of time looking after other family members. In this sense, we can begin to see how there is a historical specificity of what is deemed acceptable (Sherman, 1995).

Therefore, in addition to exposure (description) of the experiences of unpaid carers, we also require explanation of why there is no further support forthcoming. In utilising the dialectical method, we start from the concrete circumstances, explain the general

processes behind the development of unpaid care and disability and bring this back to help explain the current conjuncture. In this way, we can see the importance of understanding the “basic laws of motion” whose general insights must then be carefully applied to the specific situation which has arisen under a specific set of historical circumstances. In this case, the general tendencies of relegating those outside the labour market to secondary importance was mediated by the undermining of eugenics post world war two, the development of the NHS under pressures from growing radicalisation on conclusion of the war and the feminist and disability rights struggles which arose in the 1960s and 1970s. Therefore, what is deemed politically acceptable is a result of previous social struggles and prevailing ideologies. This shows conclusively that the treatment of disabled people and unpaid carers is not fixed once and for all and depends on economic and political processes as well as the development of class struggle in its broadest sense. In as much as carers can be deemed to be unproductive to the capitalist economy since they don’t directly produce profits, they also have a wider credibility given the role they play in providing unpaid care. This leads us to our first suggestion for campaigning:

### **Recommendation 1**

**Carers do not have economic power in the sense that they will withdraw their labour. However, prevailing ideas which suggests disabled people should be supported means their cause has the potential for widespread support. However, to maximise their impact, the importance of combining the political power they have with the economic power of the trade unions will be key. This could be forwarded by unpaid carers in trade unions trying to raise this issue within their union branch or regional / national conferences. In essence this is an argument for political trade unionism, recognising that without involvement in issues that are not directly “economic” (i.e. wages and conditions), the relevance and support for trade unions will continue its long decline. Furthermore, although the potential for direct strike action over questions such as the rights of unpaid carers seems distant today, that does not rule this out for the future and so preparatory work will likely bear fruit further down the line. More immediately, the manner in which strikes are held (campaigning slogans, interviews and so on) are important in changing the political discourse over a whole range of questions.**

2) The government / state cannot be entrusted with improving the situation. Therefore, produce social accountings in opposition to dominant interests.

Although there is an important extent to which carers have the moral high ground, another purportedly ethical position would postulate that we should look after each other regardless of personal cost. Thus, the ethical onus can be shifted from the state to the individual. This is tied into to what extent care can be seen as a choice. Of course, if you cannot stand the thought of inadequate support for a family member, it is only a choice to the extent to which you put aside the likely consequences of not carrying out the caring role. If we consider how often people “choose” not to care for a friend or neighbour, the ideology of the family becomes more obviously apparent.

Added to this, there is also the notion presented by governments that there are only limited resources and so the needs of the carer are in conflict with the needs of the population as a whole since we need to ensure stability and growth. Whilst the problems with this argument are dealt with in Chapter 8, the point here is that these arguments can only be won politically and by challenging dominant assumptions, rather than assuming “right” and “wrong” will win the argument.

Anyone who supports carers, is a carer themselves or is part of a carer campaigning group would probably find it difficult to understand why this situation can be allowed to persist if ethical behaviour was a key consideration for policy makers. This leads to a focus on pricking the conscience of policy makers and negative beliefs about human nature more generally when they fail to act. However, what is seen as ethical ultimately depends on whose side you’re on. Therefore, supporting meaningful change for carers entails taking their side *against* the government. The suggestion here is that mobilising carers and the wider populous is key. Central to this is convincing people of the idea that we do have agency and it can be different in the future.

Here, the role of historical enquiry was deemed vital. It was shown how the origins of the original carers allowance was developed with the full understanding that most carers would not receive any additional financial support because they would already be claiming some kind of governmental support. In addition, it suggested that when the discrediting of eugenics post world war two undermined the segregation of disabled people, “care in the community” was a tactic adopted to speak the language of disability empowerment whilst providing a golden opportunity to lower costs and

place the onus onto individual family members. Moreover, today the government has plenty of information on the negative consequences for unpaid carers yet they have point blank refused to act on this.

## **Recommendation 2**

**Campaign with a focus on confrontation rather than co-operation with government actors.**

3) Respect the power of ideology. Produce social accountings which disrupt current ideological understandings.

Whilst other attempts at social accountings have placed emphasis on neutrality, this is largely illusory. For example, Government figures which may be technically accurate are also positively misleading. Here, the example given was to use the aging population argument to minimise expectations that it can ever be better. The government is shown as simply managing an ever worsening series of pressures which are supposedly distinct from government priorities. Therefore, it is essential that attempts are made to disrupt current understandings in order to forward agency. In this instance, an attempt was made to unpick the economic fatalism which supports this argument and to highlight how the social wealth exists to meet everyone's needs.

Another example was given in the Care 21 report whereby the questions asked highlight the influence of ideology. In this case, personalisation was presented as a "good thing" without context and financial support was underplayed by making vague reference to "carer income" which did not make it clear if carers would be better or worse off afterwards.

Finally, there was a clear difference recognised between accounts produced by carer groups and those of the government sponsored Care21 report. Here, the questions asked reflect different priorities and emphasise carer poverty in a much more profound way. However, even these social accounts only provide description of the situation rather than explanation. As evidenced by government misuse of demographics, we need our accounts to be ideologically driven in order to better explain the existence of poverty, inequality and suffering.



### **Recommendation 3**

**Shift emphasis away from implicitly supporting alarmist government spin (care time bomb) and towards an emphasis on how profit contradicts social need and how large amounts of wealth are concentrated in relatively few hands. Without this, economic fatalism will dominate with negative implications for notions of collective agency.**

4) Continually interrogate social relations and be pro-active in seeking out new information even if it appears that we already have the whole story.

Dialectics appreciates society as a constantly changing totality. Therefore, to adequately explain what is taking place we have to update our analysis wherever possible. Even where the finding is that little has changed, we need to conduct research to show this. From the Marxist methodology adopted, we need to appreciate the specific dynamics of a given situation within the wider framework of capitalist economics. In this way, we can quickly respond to new government initiatives and motivations. In this instance, the interviews played a central role in highlighting the newly emerging drive for personalisation as well as helping to understand the wider context that may have made it relatively popular. Furthermore, we can never assume that which is reported is the end of the story. The absence of discussion on how many people actually receive carers allowance was surprising and this needs to be rectified.

5) Consciousness is key

The very fact that the development of unpaid care can appear to us as a natural development devoid of wider context is typical of the role of ideology in shaping perceptions about society. Indeed, from the dialectical approach taken, the appearance of capitalist social relations and the reality inevitably conflict or else capitalism could not continue. Therefore, governments must ensure consent by convincing the oppressed and marginalised that their position in society is somehow natural or pre-determined. Therefore, vital though carer interviews are in understanding how carers view the situation, a theoretical analysis cannot simply collapse into repeating dominant ideas that may be present here. Although Marxism requires partisanship, the interviews do not allow us to see some objective truth about unpaid care, but rather carers' perception of the experience. This is important for understanding a number of key areas. Firstly, many carers seemed resigned to the fact that nothing would change

in the future. Here, disillusionment with government inaction has fed into disillusionment with social change itself. Similarly, the idea that unpaid care is “just what you do” and the only thing is to keep “plodding on” shows the ideological pull of the family. This in part is a reflection of how the caring role serves to atomise carers into their individual households, with the prospect for collective agency appearing a distant prospect.

#### **Recommendation 4**

**A number of carers highlighted how social isolation was central to the experience. In this way, the existing carer centres can play an important role. However, this is important not just for social reasons, important though this undoubtedly is. It also serves as an aspect of civil society that represents campaigning centres in embryo, providing a space for carers to organise campaigns and share experiences. Perhaps one way to publicise these centres would be in holding public meetings to raise awareness.**

**Furthermore, in so doing we allow the early promotion of external support to prevent family care becoming normalised and expected. The question should be posed: If the government is serious about the social model of disability why are they making disabled people rely on family members for support in direct contradiction to this same model?**

As mentioned earlier, we must see unpaid care as being in a constant process of change and development. In this case, the personalisation drive represents an important development in the provision of care. Some carers interviewed seemed conflicted about this development since the existing provision was so inadequate. Pushed into a bad situation, governments are aware that anything which may appear to give greater freedom will be seen as potentially liberating. However, the historical lessons for “care in the community” show how the government can talk the talk of disability empowerment, whilst not walking the walk, becoming more interested in cost cutting and extending private sector influence into the provision of care. Here, an attempt is being made to divide care workers, trade unionists, unpaid carers and the people they care for.

#### **Recommendation 5**

**An argument needs to be made that there is no reason the public sector could not provide a more adequate service based on people's needs. It is the systematic underfunding of public services preventing this currently, not the principle of public services themselves. A new public service setup would require greater funding to ensure a large enough pool of care staff to meet the diverse needs of those requiring care support.**

Furthermore, preventing a more threatening critique of government actions often works not by telling us what to think but rather what to focus on. Much of the discourse around Carers Allowance has focused on how small the amount is. There has been very little about how few carers receive it. This will feed into one of the later recommendations under the need to struggle for reforms.

6) Recognise the state as enforcing class power but also reflecting class struggles. We must articulate positive reforms which are difficult to sidestep that would improve the situation.

It is important not to rely on the government to make improvements for unpaid carers but this does not mean they cannot be forced into doing so. The social accounting provided here has sought to expose the gap between formal legal positions on not expecting family to carry out the caring role and the reality in practice. We must instead articulate concrete changes to put direct pressure on the capitalist state in a way that cannot be easily sidestepped. Vague notions of carer charters and so on play into the government's hands since many of the demands already exist in formal legal terms and they can always point to some particular aspect on which there has been "progress". Although some may correctly state that there are as many potential campaigns as there are carers and impairments, an appreciation of the dialectic allows us to see the specific and general as a unity of opposites. In this way, general demands can be adopted. From the interviews conducted, it was clear that many of the issues were financial in character. What was interesting in looking to legal perspectives on the introduction of the Invalid Care Allowance is that the idea that very few carers could obtain it was actually built in to the proposal itself, thus providing us with the "underlying entitlement" problem which arose repeatedly in the interviews. This was certainly verified in Evandrou and Winter (1993) who pointed out that in 1988, some 2% of carers got the allowance available at that time. However, as has been pointed out

by previous campaigns “Real Change, Not Short Change”, even if obtained, the amount (£55.55 at time of writing) is clearly inadequate.

Whilst we must recognise that focusing on carers allowance itself is not going to help all disabled people or all carers, we need to start somewhere. Articulating demands like this can help to promote a wider dialogue about the society we wish to live in.

### **Recommendation 6**

#### **Campaign for the adoption of the following:**

- **The immediate scrapping of the “overlapping rule” which so often leads to “underlying entitlement” which is not realised in practice.**
- **The immediate scrapping of the “gainful employment” clause which fails to appreciate that many carers work and care. If this is particularly controversial, it could even simply be increased to £200 per week to ensure a minimum level of income.**
- **The introduction of a £200 per week non means tested carers allowance on the basis of the criteria currently used.**

This should not be seen as counterposed to wider improvements in health care provision more generally or to improvements in disability allowances but as part of a wider struggle for universal provision which meets social needs.

Immediately, the point arises that this places demands on the UK government and not on the Scottish government. Here, it is suggested that the SNP administration be expected to proactively support these demands in parliament and make representations for changing this situation with a commitment to changing the law themselves in the event of a future independent Scotland after the referendum in 2014.

7) The best social accounting imaginable will have little purchase without a powerful social movement.

Allying yourself to and being a part of a social movement is of vital importance because it provides some insurance that the research questions posed are against dominant interests and for those of ordinary people. Not only this, we can actually have a greater contribution here and relevance since the questions adopted will be “live” issues

already in popular consciousness to some degree. This echoes a logic outlined in Sikka's (2000) argument with Martens and Murphy (2000) about the problems with idealism and expecting that the solution is simply one of "education". Similarly, Cooper et al (2005) suggest that attempts at social accounting will have little purchase if they are not "linked to contemporary social struggles and groups". Active campaigning is absolutely essential in securing social change and given the widespread lack of support carers have is becoming more established, it seems that winning the argument on its own will not be sufficient. As one carer explained the government already possesses all the relevant information on the carer struggle. What is lacking is any concrete action to change this.

### **Recommendation 7**

**Harness the growing trend towards participation in protests to highlight government inaction over the treatment of unpaid carers. Counterpose this with the relative ease of the tax avoidance from the super rich to waylay arguments about economic fatalism. In addition, tie this in to the growing awareness and discussion of women's oppression. Pulling together these strands would form a powerful protest group and would engage with shifting consciousness on these questions. Without pressure, governments will issue vague statements of support with little concrete action. Instead, force the issue by suggesting a change they will be forced to take a position on one way or the other. Such protests could be combined alongside collecting a petition in support of Recommendation 6.**

## **Chapter 10: Conclusion and Summary of Contributions**

This chapter seeks to look at how the research question has been addressed by giving a summary of the main arguments that have been put forward. It also explains how this work constitutes a contribution to existing knowledge in the social accounting field.

In this research, it was asked:

To what extent do the theories underpinning engagement undermine social change agendas?

**Contribution 1 – Uses a different method to consider the impact of theoretical understandings on attempts at engagement.**

The literature review provides a critical assessment of assumptions about engagement contained within the literature. Others have looked into examining different theories and their implications for engagement (Ball, 2004; Laughlin, 1995; Mouritsen et al, 2002). However, the unique contribution here lies in the use of extensive citation rather than typologies. In other words, it uses practical examples of other theorists work. It is thought that this will better draw out some of the more implicit theoretical assumptions contained within the literature.

In addition, this is considered from a Marxist standpoint. However, this is not to argue the question of engagement has not been looked at from a Marxist standpoint before. Cooper (2002), for example, has outlined the importance of connection to social movements as a means of retaining some hope of overcoming pessimism within academia. Whilst this thesis also holds social movements to be central, the Cooper (2002) paper does not focus on providing a detailed critique of the underlying theoretical assumptions that guide different works.

In addition, although Gray (2002) has provided an extensive review of the social accounting literature, his attempts to remain neutral and hold “the project” together make it difficult to draw clear lessons from the review. In contrast, the aim here is to expose the differences to pull social accounting in a different direction. In this sense, the review can be considered intentionally oppositional at times in order to draw out theoretical disagreements.

Given that the aim was to assess the assumptions about engagement within the literature you inevitably run into two difficulties. Firstly, you have to decide what “the literature” is deemed to include. Largely, this has been based on self disclosure of attempts at CSR or its derivatives or incorporation of different attempts at critical accounting which can broadly be considered one subset of social accounting broadly defined. The second problem is that looking at assumptions meant attempting to draw out that which was perhaps only implied. As a result, it is inevitable that there may be differing interpretations about the assumptions behind particular works. As a result, extensive citation was used to try to provide as much supporting information for the interpretation adopted. Of course, part of the argument here is that more should be done to make these assumptions explicit and so this is also part of that discussion.

**Contribution 2 - Builds on arguments made about the need to separate out the more critical project from more conventional CSR variants of social accounting by providing a brief review of the ecological economics field.**

Perhaps the source of some of the difficulties and uncertainty lies in the broadness of the works contained within “social accounting”. Rather than seeing this as a strength, in this instance it instead leads to a lack of clear aims and objectives and those seeking to hold the project together are thus faced with an impossible task. Therefore, rather than trying to elaborate on what social accounting is, here it was argued that meaningful social accounting must be opposed to dominant interests, recognising that what is deemed meaningful obviously depends on what your goals were to begin with. The central point here was that we are not all part of the same family.

What Gray (2002) describes as “*the social accounting project*” (p. 699) representing the more critical perspectives is very useful in attempting to move forward as is Spence’s (2009) separation between CSR and the rest of the social accounting project which explicitly challenges existing structures. Such clarification allows us to forward the emancipatory potential of these accounts without adopting a strategy that will simply lead to frustration and disillusionment.

One assumption within many attempts at social accounting is that business interest equates to the public interest, or at least, can be relied to act in this way through discussion. This, in turn leads to suggestions that we can use conventional accounting to contain capitalism or that we can use people’s ethical principles to enhance the

prospects for change. In addition, the idea that businesses can be relied upon to adapt based solely on rational argument is summed up in the idea that the most effective engagement is to work on both the inside and the outside. The idea here is that we are wasting our time “outside the tent”.

In part this can be contested by examining why companies have embraced the social accounting agenda. Here it was argued that whilst social accounting was initiated against a radical backdrop, it was then adopted voluntarily to offset wider criticism. Without the radical backdrop present at its inception, this adoption of social accounting is almost entirely in the business interest. Therefore, the mere fact of adoption of social accounting practices by companies does not signify a “success” for those proposing it. The key question instead is to what extent has behaviour been changed? Rather than appreciating this weakness and the shifting balance of power between corporations and ordinary people over this time period many have simply taken the opportunity to exaggerate the impacts of CSR practices and this is largely held to be counterproductive.

Here, the unique contribution lay in using the ecological economics field to provide an example of the kind of works critical theorists would wish to distance themselves from. In this way, the different political assumptions contained within different journals was used as a window into different perspectives on social accounting.

In a similar vein, the way in which “social accounting” is seen as unquestionably positive is reflected in the discussion with catch all terms like accountability and disclosure. Although it is possible to use these concepts in a meaningful way to forward social change, instead they are often prone to reflect dominant ideological assumptions. To forward the debate, here it was suggested that instead we should be clear why we care about these questions. Who are we holding to account? What are we disclosing exactly, why are we disclosing it and who controls what is ultimately disclosed? As always, aims, objectives and tactics are paramount.

**Contribution 3 – Places discussion surrounding disclosure in the context of its impact on notions of agency. Highlights the disempowering impact disclosure can have in the absence of an explanation of why what is disclosed takes place.**



There has been work carried out which outlines the motivations behind what is disclosed, highlighting the issue of “selective disclosure” in the organisational interest (Dye, 2001; Kamla, 2007; Neu et al, 1998). In terms of informing the social accounting provided here, the key point from the debate about disclosure is that it is not automatically useful since the question is always who decided what is disclosed. However, the contribution here lies in suggesting that for disclosure to have any meaningful purchase and to encourage social change it must also have a theory of why the many “bad things” that seem to multiply daily continue to take place. Thus explanation and theory are argued to be central to attempts at social accounting. In this vein, although more formal social accounts with numerical analysis can be powerful in showing the extent of a problem and making people take notice, without the explanation of why it happens and how it can be different it can ultimately be demobilising. In this sense, rather than saying only that disclosure is often a PR exercise, it adds that even when more critical disclosures highlight the negative impact of action / inaction from governments or corporations, this does not automatically have a positive impact on feelings of agency.

This is tied to the argument that the effectiveness of social accounting will be limited to its ability to connect with vibrant social movements (Cooper, 2002; Cooper et al, 2005). From this perspective it would be a mistake to accept that disclosure is unquestionably positive, or, at least, focus only on its positive impacts. In contrast, here the contribution lies in outlining the problems with a sole focus on disclosure and the negative impact it can have in the absence of theoretical explanation for why specific examples of inequality, poverty and suffering persist. Indeed, disclosure without explanation can be disempowering in some instances. This is evidenced by placing all discussions surrounding unpaid care in the context of an aging population alone which tends towards very narrow political conclusions.

**Contribution 4 - Builds on the debate about the role of the capitalist state by suggesting that even the more positive aspects (e.g. health care and education) must be placed in the context of class conflict and competition between states.**

Without a clear articulation about your political assumptions, the default position is to justify existing social structures. The most important of these is the idea that the capitalist state is benevolent and acts in the general interest. Specifically, there is a great deal of problematic assumptions about the role of the state and the motivations

and context for previous welfare reforms. Discussing this is therefore a central research aim in its own right and is elaborated upon in the section on the welfare state.

Much of the implicit theorisation of the capitalist state present in the literature (Ball and Seal, 2005; Lehman, 1999; Carnegie and West, 2005) seriously exaggerates its democratic aspects. In contrast, here this thesis builds on the work of Catchpole et al (2004) and Sikka (2000) to unpick these assumptions within the critical literature and combine this with a different explanation.

These assumptions include that people's decisions are enacted by the state and that local government actors can be convinced principally through dialogue and debate. Thus, although explicitly it is accepted this is not always the case, the implicit assumptions seek to understate the democratic deficit within a modern capitalist state. Similarly, health and education are largely assumed to be granted for our benefit, as ends in their own right under capitalism.

Although there has been work on public services, almost all assume to a degree that they exist for the "right" reasons, as a positive end in themselves (Ball and Seal, 2005; Carnegie and West, 2005). In other words, health care and education exist in order to provide health care and education without recourse to competitiveness or capital accumulation. However, here the contribution lies in placing the development of health and education in the context of class conflict and competition between states. This has implications for those who argue that the form of accounting for public services is inappropriate since it is perfectly appropriate if the goal is to rationalise and minimise expenditure rather than provide a high level of service.

What these works fail to do is ask why the state so often does not act in the interests of ordinary people. Moreover, if the state can be trusted, the implication is that we just have to wait for progressive reforms. Instead, here it was argued that rather than welfare provision symbolising some kind of benevolence, the state uses consent and coercion and so at particular moments capital can and will grant concessions. Indeed, the future of accumulation may at times depend upon it. However, over the longer term, capitalism does not equate to meeting social needs, and instead stands in opposition to them. None of this requires falling back into crude functionalism. Here, it was argued that we can use the state to articulate demands but only with serious and

sustained pressure. One way of doing this is to use the existing discourse around accountability and disclosure to articulate a different vision.

**Contribution 5 – Builds on the work of Cooper et al (2005) in showing the usefulness of a Marxist approach to social accounting.**

In attempting to put forward the advantages of a Marxist framework for social accounting, it is essential to recognise the need for the unity of theory and practice. Therefore, whilst the methodology section was a theoretical grounding articulating a Marxist approach, it cannot be understood in isolation from the attempt at social accounting for unpaid care provided. It thus provided the rationale for the attempt at social accounting.

Firstly, the fear of not having sufficient neutrality was countered. It was held to be perfectly acceptable to be partisan in research and to argue for greater support for carers. Where injustice prevails, it needs to be challenged. Indeed, here it was argued that not being explicit risks putting dominant ideological biases into your research framework without even realising it. Whilst some may claim that this prevents you from conducting meaningful research, here the desire for understanding capitalism stems from wanting to mount a more effective strategy for resisting it. In this way, there is a need for a scientific approach to better gain purchase on the topic of investigation.

Moreover, the research questions we ask and the topics we investigate are never neutral. By dealing with subjects of contemporary relevance like unpaid care we ensure there is a link to the movement of the oppressed and exploited. Indeed, it was perhaps surprising how few examples of engagement with contemporary live issues were present in the literature. It would seem that if the role is to influence and encourage social change, embracing topics of direct relevance to the mass of people would be a good way of achieving this and would guard against some of the tendencies of “academic Marxism” alluded to in Cooper (2002).

Dialectical materialism was outlined as allowing for generalisation to gather the basic trends but also explanation of these so that they can be appropriately contextualised. This requires us to continually interrogate existing social relations. As part of this individual stories, rather than contradicting theoretical understandings can be useful in

allowing us to better understand the whole. This allows us to conduct individual interviews with carers in some depth without sacrificing the need for general trends.

Furthermore, whilst idealism would discount protests and so on since ideology is presumed to precede social change, dialectical materialism allows us to locate existing ideologies within our life experience. Thus the process of struggling for something different opens us up to different ideas about the world. In this sense, attempts at social accounting would ideally be campaigning documents, used to aid the articulation of demands and in giving greater legitimacy to the claims of the oppressed and exploited.

Additionally, we must seek to understand the different linkages between different parts of the system in order to better understand the whole. In this way, we should prevent attempts to try and artificially separate knowledge into separate and unrelated blocks. This does not mean that we cannot try to explain the most immediately relevant links and influences to a particular topic or area of investigation. In this case, the theorising of disability discrimination and the role of the family show the importance of this approach.

In line with the claim made previously about using general trends and tendencies to better understand a specific situation, having a grasp of the basic laws of motion of the capitalist economy is of enormous importance. Here, economics was seen to be central to the explanation of carers' current plight. The pursuit of profit above all else, leads to the systematic undervaluing of health care and education as ends in their own right. In this way, those not able to be exploited in the labour process are cast aside as much as possible given prevailing political conditions. Of course, for this general process to be useful we have to look at how the carers' situation played out historically in practice.

Finally, it is accepted that if we only critique it is difficult to feel like an effective agent of social change. Here it was explained that the ill treatment the majority of the world's population suffers is unacceptable precisely because there is an alternative – socialism.

**Contribution 6 - Outlines the importance of historical analysis for guiding current tactics.**

Another key component of the Marxist method is understanding the centrality of historical inquiry in looking at how society develops and changes. By understanding

the past not only do we better understand how to fight for a better future but we also prevent being sold the idea that change has taken place solely because of certain influential individuals or government actors. This was shown in the sections on the history of carer benefits as well as the welfare state which illustrate this point. The explanations of how change has taken place, therefore, is shown to have implications for grasping effective agency today.

Although history never repeats itself exactly, this does not mean there are no lessons which can be taken from previous experience. This understanding of the importance of historical enquiry is evidenced repeatedly in the thesis in the sections on the history of social accounting; the development of the welfare state; and in the sections on the political economy of disability discrimination and the history of carer benefits.

Lessons can no doubt be drawn from the work of Solomon and Thomson (2009) in looking at Braithwaite's Victorian environmental account in 1853 or that of Gallhofer and Haslam (2006a) who show how accounting information was used for a progressive purpose in the context of Red Clydeside during the First World War. However, if we do not relate the historical lessons from such works to the contemporary situation we run the risk of suggesting that such examples are only *historical* in the sense that we have now "moved on". We need to remember that whilst historical enquiry is vital, there are plenty of examples of exploitation and oppression available for us to choose from. It is of central importance that we involve ourselves in these contemporary struggles.

### **Contribution 7 - Disputes current misunderstandings of Marxism surrounding the approach to engagement and reformism.**

Another part of the debate regarding engagement and agency was how best to achieve social change and the need to elaborate our ultimate goals. Therefore, another unique contribution of this thesis is that it outlines a different perspective on the struggle for reforms. For so many typologies the idea presented is that for Marxists anything short of immediate structural change is immaterial (Mouritsen et al, 2002) or the potential of a Marxist wanting to struggle for reforms is ignored (Ball, 2004). Deliberate or otherwise, this serves to make Marxist theorists seem irrelevant with nothing to say on everyday debates. This thesis represents a direct response to this. Without reply, the caricatures are likely to dominate with devastating effects on the theoretical and practical direction of the social accounting project.

It is sometimes stated that revolutionaries are just asking for too much. In this respect, it was explained that revolution and reform are contradictory end goals but a mutuality of interests exists in the struggle for these reforms since this allows people to gain confidence and see their common interests. Therefore, reforms are worth fighting for. In the context of this research then, articulating demands is a potentially fruitful action.

**Contribution 8 - Provides a practical example of how change has taken place in the past with a view to countering contemporary theories of agency today.**

Given how important the idea of the state is for some theorists (Ball and Seal, 2005; Carnegie and West, 2005) it is important to consider this question in more detail.

The welfare section questioned dominant assumptions implied in the literature about the capitalist state and about effective agency. Specifically, it was an attempt to explain that the development of the welfare state does not represent altruism reflected in government policy or reflect a neutral “harmony of interests”. Moreover, it seeks to show why we cannot rely on governments to provide for our needs since this does not take place without serious and consistent pressure from external forces. Indeed, the welfare state was borne in tension with capitalism, not because of it.

First of all, an attempt was made to theoretically locate the idea of the welfare state. For many authors, it represented a defence against the free market, giving rise to the idea that this was a separate space acting outside of capitalism. Tied to this is the idea suggested by the term itself, that the “welfare state” represented an end to capitalism. Indeed, this development led and still leads many authors to see the capitalist state as ultimately benevolent.

However, for one thing, health and education can give a state competitive advantage in certain conditions. The National Health Service is deemed to be more efficient than the US model for example. Moreover, not having a welfare state increases political instability in the longer term. Thus, some basic provision can help to provide the stability required for long term capital accumulation. However, this was shown to be a contradictory process. One problem is that it becomes increasingly difficult to meet the rising expenditure to fund welfare under capitalism. Another difficulty is that there are diminishing returns to welfare for governments. This effectively means that if you maintain welfare it has little effect on legitimacy but when removed can have serious delegitimising effects. Therefore, whilst concessions were granted in the context of

radical ferment, they were only maintained in the context of economic boom and a strong workers movement. As a result, some may argue that welfare simply reflected the “interests of capital” and induced political quietism. However, instead, capitalism as a system simply bought itself some time, only for the same problems and contradictions to manifest further down the line.

The kind of assumptions implicit within the literature would probably lead us to the conclusion that the welfare state was a product of a combination of the Beveridge report and the Labour party. However, this section sought to show the set of historical circumstances that led to its creation and to counter any faith in important individuals or the electoral system. Of course, these things were not irrelevant but were merely conduits through which these changes took place. For one thing, the main aims of the Beveridge report were to restore wartime morale, not to provide equality and this is evident in the fact that the subsequent redistribution was mainly from people without children to people with children.

Indeed, war was central to the development of the welfare state in a number of ways. Firstly, the Boer War exposed the need for fit soldiers and shortly afterwards school meals were granted. A similar idea, but on a far greater scale existed during the Second World War. For one thing, the evacuations showed that poverty was rife. In addition, health care and food, initially available to only a very small number of people had to be expanded to greater and greater sections of the population as part of the war effort. This, in part laid the way for the NHS that was to follow. The state centralised a number of key economic roles in addition to rationing food and providing health care. Arms production and the role played in the evacuations also provided an important backdrop for greater state involvement in the economy subsequently.

Indeed, it was precisely the role of the state in centralising arms production which led to a huge fall in unemployment. This not only raised the power of the working class but the experience of full employment served to raise expectations. This was among other factors important in contributing to the political calculations of the ruling class in granting welfare. Not only was there huge disillusionment with the war and the interwar years poverty preceding it, but also increased political conflict in the latter half of the war which led to the government appreciating the need to contain this threat. This is further evidenced by the defeats of the main parties before the end of the war in by elections even though they were standing as a coalition. Moreover, the

radicalism was also evidenced in the success of working class parties immediately after the war was complete.

It seems reasonable that the lessons from the radical conclusions to world war one had been learnt. The Russian revolution (1917); the engineer strikes for a shorter working week and the demonstration in George Square (1919); and the General Strike of 1926 were all fresh in the memories of the ruling class. Indeed, understanding this, the Marshall plan was used to fund the welfare states across Europe precisely to prevent a possible socialist threat.

Moreover, the reluctance to grant this is also an indication of the level of opposition to meeting the needs of the general population. The ruling class was divided on the question of welfare. For one, Churchill worried about post war growth if the reforms were granted but was also concerned it could fragment the Labour Tory coalition.

On the flipside of this, it was also held to be problematic to claim that Labour was singularly responsible for the welfare state. Of course, the exact form of its development may well have been altered had Labour not come to power. However, this does not mean it was primarily about individual governments since it was not just social democratic but conservative and liberal parties that started them and sometimes extended them across the rest of Europe. Labour were agents in the process, but only because circumstances provided the context in which these reforms were deemed necessary.

The key lessons from this section then were that historical analysis is vital in understanding why the welfare state developed as it did. This analysis shows that the State will restructure based on concrete conditions but ultimately tensions will express themselves. Individual actors and electoral organisations were not held to be the central agents in the process. Instead, the increasing radicalism and impatience in conditions of poverty and war provided the context for these changes to take place. Capitalism did not willingly grant these reforms and cannot reliably defend the welfare state today. Although it was subsequently maintained, this was only the case during a period of sustained growth and a powerful working class. The fact that the state will restructure in certain conditions means we can win concessions and thus reforms are worth fighting for. For one thing, reforms raise questions about the type of society we wish to live in. However, in the context of austerity politics, we should be vigilant to



prevent restructuring on their terms and to appreciate that reforms under capitalism are always subject to counter-reforms.

**Contribution 9 – Adds to previous research on unpaid carers. This is particularly useful in looking at how few carers obtain carers allowance; carers’ perceptions of government; the prospects for social change and the role of the family**

With respect to the attempt at social accounting, firstly, previous research was used as a guide to potentially fruitful interview questions and to provide some initial background to the caring role. Part of the reason for this was to use previous work on demographics which could not adequately have been replicated in a small number of interviews. However, in addition, and perhaps unintentionally, it was found that the issue of an improvement in the carers allowance appeared to be downplayed in recent governmental research.

From this information, interview questions were drawn up. Here, the interviews were important in understanding the lived experience of those carrying out the caring role. However, they also allowed a focus on areas that might be of significance to carers. The key points here were:

- Carers Allowance was often not obtained
- There is a large number of disabled carers
- Negative sentiment about the assessment of need and available respite
- Problems with personal budgets and personalisation
- The prevalence of leaving work in order to care
- The severe social impact of caring
- A sense of family duty
- A lack of belief in the potential for social change after a lack of action from governments.

Whilst some of these findings reflect previous research, there was perhaps new insight gained into the difficulties of obtaining carers allowance which would not have been so clear without the interviews. In addition, personal budgets and personalisation was relatively new at the time and so this discussion greatly added to the findings. Furthermore, the ideological role of the family also seemed to play a role in making carers feel compelled to carry out the role in the absence of government support. Given the focus on engagement within this research perhaps one of the most important

findings was that carers are extremely negative about the prospects for future change. This is largely due to disappointment with the lack of governmental action on this question. However, the carers interviewed also expressed a desire to prevent governments taking them for granted and a determination without which it is hard to imagine them continuing in the role.

The interviews thus allowed a focusing in on key areas and prompted a number of questions which could attempt to unpick why these conditions exist. In this way, this attempt at social accounting differs from previous attempts which perhaps views disclosure or description in itself as the main goal. Instead, here an attempt at explanation was key. For example:

- Why do so few carers actually receive the allowance ostensibly for carers?
- What is the governmental motivation behind personal budgets? Are they emancipatory for disabled people?
- What is the role of the family in sustaining unpaid care?
- Why do governments refuse to act and can we rely on them to achieve social change?

Each of these were then discussed in the explanation of why care takes its current form. This section began by critiquing the common sense position of why care is so prevalent so as to allow an opening for alternative explanations. This is important in encouraging agency since economic fatalism is central to the current debates about the future of care. Without explanation as well as description the government line will be the default common sense position, discouraging those who find the current situation unacceptable but who do not believe it could be any different.

Although many findings replicated previous research, the new insights showed how it is important to continually interrogate existing social relations. By trying to explain the issues that carers thought important, it hopefully improves the possibility of that same group seeing this form of social accounting as something relevant to them.

This thesis has outlined the importance of theoretical understandings in influencing, and often undermining, attempts at engagement. It has argued that this is a central problem and has sought to expose what are perhaps only implicit assumptions in order to refocus and redirect future attempts at social accounting. To conclude then, whilst the potential of the approach outlined in this thesis can only be realised in practice the

point here is to show the possibilities that such an approach may provide for other critical researchers.

## **Chapter 11: Limitations and Future Research**

Although the theories underpinning engagement practices are important, this thesis does not directly address what the methods of meaningful engagement are. Whilst obviously this is of importance to the topic of engagement, the focus here was instead on who we should place emphasis on as the agents of social change and why this is held to be the case. Too often belief of powerful individuals or governments to act on behalf of the populous have lead to disillusionment and disempowerment.

Of course, part of assessing the impact of the thesis is to what extent it convinces others that a Marxist informed social accounting for contemporary issues based on explanation *and* description is a valid one. That cannot be ascertained in advance. Obviously the debate about the theories which best explain society is an ongoing one. Does this research represent a useful way forward for the social accounting project? Can this form of critical social accounting find a wider outlet to influence change? Or given one of the other central aims of the research will the demands put forward here help in some way to mobilise carers and can it be a part of a campaigning strategy? Again, what the thesis does not provide is a theory of engagement practices. This discussion could include how to most effectively use the media, strategies of timing for maximum impact, the role of public forums, television, leaflets, strikes, demonstrations, formal submissions to policy makers and so on. However, what the thesis does provide is a counter to the idea that reliance on others to act on our behalf is the only possible way forward. In this sense, it is an argument which states that rather than reliance on important individuals or government actors, social change will stem from the actions of the classes held subservient. Even without a context of powerful collective agency gradually building up forces of resistance to capital rule is preferable to continued disillusionment as governments fail to consider the interests of the majority of the population.

### ***11.1 Limitations in the social accounting provided***

One of the obvious limitations of the study was of its scope. A decision was taken to only include carers that were 18 or over. As a result, this research necessarily avoids discussion of the some 175,000 involved as child carers in the UK (Sellgren, 2009). One

reason for this was undoubtedly simple practicalities with regard to the potential for an increase in the problems with the time required to go through ethics procedures and so on. However, the main reason was the different issues likely to arise from this topic. These include, but are not limited to...

- The impact on education
- The effect on social development

Here, it was deemed that the issues would not be given sufficient attention and should perhaps be an area for future research where this issue can be given the detailed attention it requires. For similar reasons, there was no discussion of ethnic minority carers although this could, in theory, have been covered in the sample.

Another question regarding the scope of the study was the decision to limit the research to Scotland as opposed to conducting a UK wide study. Again, there were practical considerations. Given that almost all the interviews were conducted face to face at the location most suitable to the participant, both time and practical constraints would have made it extremely difficult.<sup>38</sup> However, once more, this was not the main consideration. The most important factor here was the peculiarities of the Scottish context within the UK.

This includes, for example, the discussion of the relative merits of “free personal care” which is not available in England but also the different treatment of the NHS especially regarding the recent changes pushed through in the “Health and Social Care” bill which have not been implemented in Scotland.

All that being said, there are undoubtedly a great number of similarities. Decisions on social security benefits like Carers Allowance are made at Westminster and obviously the increasing involvement of the market in the NHS in England is unlikely to leave Scotland unaffected. Therefore, whilst there are important specificities to Scottish carers which need to be addressed, we can also say with confidence that the interviews conducted here will still relate to the experiences of many carers throughout the UK.

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<sup>38</sup> Although it should be stated that in one case a telephone interview was conducted when distance was deemed prohibitive. This was taken as a more appropriate option than refusing the offer of an interview. However, in general it was deemed preferable to have face to face interviews given the issues of trust and openness that develop from other interview types.

Connected to this, a further consideration is the generalisability of the study, specifically in relation to the method being adopted. Clearly, the interviews adopted are intended to give valuable insights into carers' day to day experience starting to develop common themes. However, in this respect, what is perhaps lacking is the ability to make authoritative claims about the caring experience. That being said, many of the findings here are consistent with other survey research which is more readily generalisable. The advantage this research has, however, is that it allowed a much greater degree of understanding of how carers view their situation and to look at, for example, the notion of familial duty or their ideas about social change. The sheer desperation carers often feel cannot be expressed adequately solely through statistics. Moreover, being able to give practical explanation of what the caring role involves in itself starts to undermine the misunderstandings of the caring role that undoubtedly still exists.

Again, linked to the idea of the generalisability of the study is the question of sample size. Obviously whilst seven interviews are more than enough to gain insight, they cannot be taken as an exhaustive overview of the carer role and the different experiences they can involve.

A related point is also the issue of the representativeness of the sample. Unlike other research which has found that around 62% of carers are women (Central Statistics Unit, 2004), here 6 out of 7 participants were women in this study showing a potential sample bias. Of course, in terms of relating to the ideas of women's oppression and the family unit (see Chapter 8) this may have been quite useful.

It may also reflect the fact that men feel less comfortable talking about their caring role and are thus less likely to be part of a carer group, which incidentally was also the source of the majority (6 out of 7) of participants in the research.

### ***11.2 Future Research***

With regard to considering future engagement practices, one topic for investigation would perhaps be to consider the best methods of encouraging agency from research. This has been carried out in other fields, but does not seem to have been considered in depth within the critical accounting literature. Perhaps future research could also consider accountings role in fostering a sense of economic fatalism and how it impacts

on people's conceptions of agency. Given the justifications for austerity given by countless European governments at present, this would be particularly timely. This could possibly be supplemented with a paper which accounts for the actual abundance of resources which currently exist which could feed everyone on the planet more than three times over.

There are a number of potentially fruitful topics for further investigation arising from the social accounting itself. First of all, since this study was only conducted in a Scottish context, it would be desirable to conduct a Scotland and UK wide study with a survey to discover if the findings here are generalisable.

This could be carried out to allow the development of a more quantitative analysis which is more closely associated with a "social account". This could highlight the mismatch between existing need and current social provision. Specifically, it could ask whether carers felt their role would be carried out in their absence. In addition, open questions could look at what carers have done when they have not been available and what they would plan to do in the future. For example, you could compare the number of hours external care support currently granted to the number of hours a carer might request in an ideal scenario.

In addition, it would be worth looking at to what extent carers put off dealing with their own health problems as a result of concern for the person they care for being adversely affected.

Moreover, with respect to who bears the ultimate responsibility for care, carers could be asked who they think, in the main, carries out this role and who they think should carry out this role. It would also look at the motivations for people carrying out unpaid care and assess their relative importance. It would examine why so many are not able to access carers allowance. We could also look at people's experiences of direct payments. With respect to employment, we could ask to what extent caring has resulted in people carrying out part time work or even leaving paid employment altogether.

Perhaps most importantly, however, from the Marxist perspectives about reformism outlined in Chapter 3, it would attempt to formulate in more detail a popular set of

carer demands around which a social movement of carers and the people they care for could lead.

A second possible area for future research would consider a study specifically on young carers and on ethnic minority carers which would also be an interesting and important avenue to consider.

In addition, more work could be carried out on the concept of “accountability”. Given the current context of an independence referendum which is rapidly approaching, it would be useful for greater theorisation of the relationship between the UK and Scottish parliaments (perhaps in terms of looking at the Barnett formula) and in examining the relationship between Scottish government and local authorities specifically in regard to “free personal care” and the charge that insufficient resources have been provided to local authorities to genuinely provide “care in the community”.

Another debate is over the question of payment for carers allowance with reference to Venezuela and payment for housework. There are important debates to be found within the feminist literature about whether it is appropriate to pay women for housework (or by extension care) since some argue this reinforces the gender divide and subordinates women economically.

Finally, it is suggested here that in future, there could be an interview with the person receiving care in addition to the carer and the care assistant in order to better understand the way each perceives the relationship. This would be especially useful in terms of looking at how these groups are often played off against one another by government actors.



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