

gtz SOCIAL COHESION, RECONCILIATION POLICIES AND PUBLIC BUDGETING

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A Gender Approach





**SOCIAL COHESION,  
RECONCILIATION POLICIES AND PUBLIC BUDGETING**

**A Gender Approach**

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The International Experts Meeting on Social Cohesion, Reconciliation Policies and Public Budgeting: A Gender Approach, held in Mexico City from October 24 to 26, 2005, was a fruitful event as a result of a series of factors, such as the participation and involvement of professionals from different spheres of social, economic and gender policies, the coordination and collaboration of national institutions and international organizations, and the economic and logistic effort required to gather experienced experts in this field.

We wish to thank to the panelists and guests, who shared their valuable knowledge and experiences during this event, particularly those traveling to Mexico from other countries. We also wish to thank the representatives of ECLAC, ILO, UNIFEM, INSTRAW, the European Commission in Mexico, AEI, the Kellogg Foundation and INMUJERES for their participation and support to this initiative.

Finally, we would like to give special recognition to a group of individuals from the two organizing institutions, who devoted their efforts to the organization of this event: UNFPA Country Support Team for Latin America and the Caribbean (CST) and UNFPA Latin America and Caribbean Division (LACD), as well as the German Technical Cooperation Team (GTZ) in Mexico, particularly the project Pro-Gender Equity Fiscal Policy in Latin America and the Caribbean.





## INTRODUCTION

Within the framework of the Cooperation Agreement between the Technical Support Team (EAT, initials in Spanish) of the United Nations Population Fund (UNFPA) and the German Technical Cooperation's (GTZ) Regional Project "Fiscal Policy with Focus on Gender in Latin America and the Caribbean", different activities have been developed in the last two years focused on promoting a greater understanding of the relationships between democratic governability, gender equality, reproductive rights and public budgets, placing special emphasis on providing visibility to the discussions between social cohesion, gender equality and public budgets, both in relation to the construction of a theoretical-conceptual framework and to the identification of its implications for the public policies of the region.

Among the main results of these joint actions, the creation of a web page about *Gender Equality Budgets in Latin America and the Caribbean* ([www.presupuestoygenero.net](http://www.presupuestoygenero.net)) stands out, the objective of which is to create a platform of regional knowledge that allows the exchange of experiences between the different players involved in this issue, particularly governments, civil and women's organizations, academia and international cooperation agencies. Without a doubt, this systematization and dissemination of the various public budget and gender initiatives constitutes an important contribution to the political discussion processes and the influence on public policy. Within the specific sphere of rights and sexual and reproductive health, this platform of knowledge developed jointly by GTZ and UNFPA brings together projects that have already had an impact on budgetary assignment by national parliaments, health ministries and local authorities for the acquisition of reproductive health supplies, the creation of emergency obstetric services and the exemption of taxes from reproductive medical health examinations of teenage women.

Another area of collaboration that has been developed with the framework of the GTZ/UNFPA agreement is centered on the interrelationships between demographic transition, changes in families and the productive and reproductive work of women in the Latin American and Caribbean context. The preparation of a regional study on gender, reconciliation policies between the productive and reproductive sphere and public budgets, with particular emphasis on poverty, together with national studies of this subject in nine countries in the region (Colombia, Costa Rica, Chile, Ecuador, Mexico, Nicaragua, Panama, Peru and the Dominican Republic), constitutes a contribution to the debate on social cohesion, gender equality and public policy, progressing in a new direction about the discussion between the reproductive rights and the economic and social rights of women.

In a regional context characterized by advanced demographic transition, significant changes in family structures, an unstoppable increase of female participation in the labor market, reform processes in the health sector and a persistent feminization of migration, the issue of care and co-responsibility between productive and reproductive work is undoubtedly an emerging challenge for women, families and public policies. In this sense, in September 2005, at the Regional Conferencia on Latin American and Caribbean Women, a subsidiary body of CEPAL, which brings together the high-level authorities entrusted with the issues related to the situation of women and the policies aimed at achieving gender equality in the countries in the region, the meeting of the Board of Directors discussed the issue of social protection, including the economics of care and the reconciliation of productive and reproductive work, as areas of considerable concern of the Mexico Consensus adopted by the Ninth Regional Conference on Latin American and Caribbean Women, held in June 2004 and by the 49<sup>th</sup> Session of the Commission for Women's Legal and Social Conditions, held from February 28 through March 11, 2005.

In response to the demands of governments, women's and civil organizations and academia for progress in the visibilization and the debate on the future of productive and reproductive work in Latin America and the Caribbean, the Division and the Technical Support Team for Latin America and the Caribbean of the United Nations Fund for Population Activities (UNFPA) and the German Technical Cooperation (GTZ) organized the International Meeting of Experts on *Social Cohesion, Reconciliation Policies and Public Budgets: From the Gender Point of View*, which was held in Mexico City from October 24 through 26, 2005. This meeting was attended by representatives of the governments of six countries of the región (Argentina, Costa Rica, Chile, Mexico, Panama, Uruguay and Venezuela), as well as the presence of the civil and academic organizations of nine countries (Canada, Costa Rica, Chile, Spain, United States, Mexico, Panama, Uruguay and Venezuela), as well as numerous bilateral and multilateral cooperation bodies, such as the OECD, CEPAL, ILO, the European Union, UNIFEM, INSTRAW and the Kellogg Foundation).

The main objectives of the International Meeting of Experts were as follows:

- *To facilitate a first space for dialogue between international and regional experts, representatives of governments, civil society, academia and international cooperation agencies in order to progress with a public agenda proposal with regard to reconciliation policies in Latin America and the Caribbean.*
- *To facilitate the construction of a shared view of social cohesion, reconciliation policies between the productive and reproductive spheres and public budgets.*
- *To facilitate exchange of the best practices and the lessons learned in social cohesion, reconciliation policies and public budgets among countries of the OECD, the European Union, Latin America and the Caribbean.*
- *To present the results of the comprehensive regional study and the national studies (Brazil, Chile, Costa Rica, Mexico and Panama) on gender, reconciliation policies and public budgets, with special emphasis on poverty.*
- *To progress with a preliminary recommendations proposal related to a public agenda on social cohesion and reconciliation policies.*

One of the main conclusions reached at the meeting was precisely that Latin American and Caribbean women are persistently obstructed from making full use of the advances achieved in the adaptation of the legal framework and public policies for gender equality by the weakness or the inexistence of public policy measures that advance the co-responsibility of the State, family and market for reproductive work and the care of dependents. In this regard, the recognition and economic accounting of social reproduction work produced by households must be converted into a fundamental supply in the formulation, implementation and evaluation of public policies – particularly in the areas of health, education, justice, taxation and equal opportunities in order to advance in the strengthening of social cohesion, democratic governability and gender equality.

This publication reproduces all the lectures presented in the context of the aforementioned meeting and is organized into five sections in accordance with the main thematic panels developed. The first section presents the theoretical-conceptual approach to reconciliation between the productive and reproductive spheres, as well as the discussion on the future of work in modern societies and public policies. The second section seeks to investigate the interrelationships between gender, family and the labor market in Latin America and the Caribbean. The third section analyzes reconciliation policies from a global and inter-regional perspective, while the fourth section deals with a sectorial public policy point of view. The fifth and final section of the publication provides the results of the study in gender, reconciliation policies and public policy making in Latin America and the Caribbean.



## PRESENTATION

### **PATRICIA ESPINOSA**

President  
National Women's Institute (INMUJERES)  
Mexico

I would like to thank everybody here, particularly Ms. Marisela Padron and Mr. Edgar von Knebel, Rebeca Grynspan, and each and all of you, for the opportunity to share experiences in such important matters as social issues, reconciliation policies and public budgeting with this gender outlook.

Development is conceived as the creation of conditions for the real and strict exercise of freedoms and the right to choose, in an independent fashion, among different options and ways of living. Men and women alike should participate in this scenario, because democracy demands it as a dimension unavoidably linked to development; because women have demanded it in the light of economic and political processes. And that is where we find the quest for equal participation, an economic participation with the distribution of resources for men and women, with recognition of women's rights and, particularly, with public security and justice. We already have tangible results to the benefit of women, and improving their living conditions can be achieved through cross-cutting public policies formulated on the basis of a gender approach and a public agenda legitimizing and recognizing our problems and needs as a State priority.

The Mexican Federal Government, and in this regard the National Women's Institute (INMUJERES), which is the guiding body promoting the cross-cutting nature of gender and pushing public policies with a gender approach for non-discrimination and equitable development, have developed a series of indicators to follow up on their evolution and insure the relevance of the different proposals through public policies. A gender equity policy advocates budgets allocated to women, but it also fosters the transformation of the processes upon which policies and programs are designed, executed and evaluated. In this regard, I would like to highlight a series of achievements from a budgetary standpoint. Along with the Ministry of Finance, INMUJERES prepared a budget disaggregated by sex for all the agencies and bodies of the federal public administration. This budget already includes an article on the compulsory nature of this disaggregation, as well as the creation of instruments enabling the inclusion of the gender perspective in the budgetary cycle, from planning to monitoring and evaluation. The Ministry of Finance recognized INMUJERES as a governing body in charge of overseeing operative rules and guidelines in this field. On the other hand, progress has been made in training public officers linked to this process so they can include the formulation of operative rules in institutional planning and so they can use the tools, indicators and methods developed by INMUJERES.

This, which may not seem much, is actually a remarkable achievement. It lays the foundations for women to have equitable access to the benefits of public programs and also to force the federal public administration to assess the use of expenditure allocated to social development. As of 2003, the government's expenditure budget includes allocations aimed at women for each government agency and body.

I could speak about several public programs resulting from this effort towards a social cohesion and reconciliation policy, but I will not elaborate on that. I would like to mention, however, that we have programs guiding women from an educational standpoint via scholarships, so that our culture and women's access to work in equal conditions can change from their early childhood. As far as health is concerned, we have also witnessed major actions in Mexico, such as the people's insurance, with 70% of its beneficiaries being

women. This is all part of a social development policy prioritized by President Fox to address our main deficiencies and deal with aspects neglected by the public agenda. The objective is to provide health, education and capacity building so women can fully participate in society, particularly in favor of women and children, generate income opportunities that can translate into higher levels of well-being, and gain access to goods and efficient basic service infrastructure for everyday use, such as water, drainage or electricity. The lack thereof prevents women from carrying out everyday life actions and increases double and triple work shifts.

Improving women's conditions and access to the productive sphere is another big challenge. In this regard, the quest for women's financial independence has started. But it has not been solved yet. Imbalances in women's lives resulting from the attempt to find better responses between women's productive and reproductive life leads to the problem of double and triple work shifts, which must be addressed so women do not have to choose between a family project and a work project. We need a social cohesion pact allowing us to go beyond the division of labor, that is, to coordinate and harmonize family and paid work, the public and the private. Many women, despite contributing to their households, have not yet made decisions regarding their own lives, and welfare systems continue to perceive them as beneficiaries or individuals depending on their partners' rights.

Reconciling work and family life is a matter requiring an urgent solution. The labor market is fairly complex, a fact reflected in a huge stratification of income, categories, work levels, access to legal protection and, of course, social protection and time management. It is necessary to rethink time management in the everyday life of men and women and between the public and the private, for example, to assume men will join the household sphere in order to distribute all these burdens and responsibilities in family life. And the labor world is the place where the conflict is more widely expressed as a result of changes in the way the family is organized.

There has been a significant change in the shaping of the family structure in Mexico over the course of the last few decades. With the family as the most important social core, economic crises have taken their toll, as 22% of female heads of household must do caregiving and household chores and generate income. Thus, it is important to come up with solutions allowing women to effectively reconcile work and family life, this being the reason why we should propose the creation of a strong and effective social security network, create conditions so schools have longer schedules and review gender equity policies in the work spheres, such as flexible schedules, compressed work weeks, etc. INMUJERES promotes the Gender Equity Model program, which is a certification for public and private companies promoting equitable policies for men and women within the organization. This year a total of 60 public and private organizations were certified under this model, which represents a population of almost 200,000 workers. With this, the idea is to change the situation in the work sphere.

I would like to highlight the importance of the latest National Survey on Time Use by the National Statistics, Geography and Data Processing Institute (INEGI), where INMUJERES provided support for the integration of a detailed analysis of the time devoted to the different household activities carried out by men and women, a key element in the analysis and design of new policies.

I also want to share several proposals linked to the need to continue and reinforce the design of public policies with a gender perspective in all sectors (social, productive, academic). We must redefine and reassess the space of the domestic, in its own context, as an economy made up of activities, goods and services necessary for people's everyday life; we must rethink the social security policy so it incorporates the gender perspective, including a poverty relief program, provisional systems and women's unpaid work. We must formulate labor policies recognizing and differentiating the use of time by men and women in public and private spaces, and harmonizing productive and reproductive work. In terms of public budgeting, we should not only continue to promote programs specifically designed for women; budgets must be gender-sensitive and there must be a fiscal pact

ensuring the efficiency of the population's economic and social growth. We need to do consistent work through trade unions. Trade unions have a broad presence in Mexico, particularly in key areas such as labor, education, health and others. We need to promote economic growth based on a distributive policy and guarantee women's ownership of their rights, and we must be able to speak about integral citizenship. Structures and institutions must change, considering they are conceived following a patriarchal pattern where training and negotiations take place in work schedules where women have other activities preventing them from participating in decision-making spaces. The State must intervene to address these inequalities. Those of us in government structures must promote public policies helping reduce inequality and the gap between men and women.

And last, but not least, legislative reforms must be promoted. We know laws do not produce immediate cultural changes, but they are the basis, particularly in labor terms.

This is the contribution being made by our government, and I am sure the presence here of experts in matters related to social cohesion, reconciliation and public budgeting means we will come up with great proposals, particularly in Mexico, where we want to build a more equitable and fair society where we can all live in peace. Thank you.





**MARISELA PADRON**

Director  
Latin America and Caribbean Division  
United Nations Population Fund (UNFPA)

Distinguished colleagues and friends who accompany me at this table, dear friends who are participating in this meeting, I am pleased to be here on behalf of the UNFPA in the installation of this meeting of experts on social cohesion, reconciliation policies and public budgets. This event is the result of an initiative promoted within the framework of the cooperation agreement between the UNFPA and the German Technical Cooperation's (GTZ) Regional Project "Fiscal Policy with Focus on Gender in Latin America and the Caribbean", which has been conducting different activities focused on the promotion of a greater understanding of the relationships between democratic governance, gender equality, reproductive rights and public budgets.

I must mention that the analysis of the relationship between productive and reproductive work from a perspective of gender and rights has been one of the lines of work promoted by this agreement. Reconciliation policies in these spheres in Latin America and the Caribbean have been part of this reflection through the analysis of cases of countries that will be presented in today's meeting. For the UNFPA, following the Cairo+10 and Beijing+10 regional processes, this meeting represents an excellent opportunity to reflect on the discussions on demographic transition, the labor market, gender equality and state reforms, particularly health sector reforms, from a point of view that seeks to strengthen and renew the agenda of gender equality in the region taking into account the significant advances experienced in their development, while also considering the challenges and tensions that are outlined in relation to the evolution of families, household and the social policies in the current context of demographic change. In the region, traditionally, the reconciliation between women's entry into the labor market and social reproduction has arisen through the sexual division of work and the cumulative burden of tasks that generally falls on women. The delegation of reproductive work in households, above all in the middle and upper classes of the region, has basically rested on the hiring of remunerated domestic employees.

In the current context of migration and the increase of migratory flows, we are witnessing a growing phenomenon in which workers, particularly care and health workers are not being produced, but rather they are being imported from developing countries. This dynamic is progressively transferring the sexual division of reproductive work to the global sphere. The characteristics of the progressive feminization of international migration in Latin America and the migration policies of the receiving countries, such as in the case of Spain, where half the official migration quotas are being assigned to domestic and care work, reflect this trend. This is the case of Ecuadorian women in Spain and Mexican women in the United States.

The case study information to be presented at this meeting shows the profound relationship between demographic transition, which can be seen in decreased pregnancy rates and population aging, changes in family structures and the reproductive and economic autonomy of women. If the cost of demographic transition has fallen on women with a progressive increase in their workloads, the aging process within the framework of the current context of social policies also represents a challenge in the same sense. In Brazil and Chile, the information shows that the reasons for the lack of participation or the exit of women from the labor market is due to that 60% of cases are linked with the establishment of a union and with reproductive work, much more consistently than with the lack of opportunities of access to work and dedication by women. Therefore, reproductive work seems to represent an important factor for women either not to enter the labor market or exit from it altogether

The case studies also demonstrate the greater relevance for women of the family structure when analyzing their entry into the labor market. The presence of children does not significantly modify the participation of men in the labor market, whereas it is a determining factor in the case of women. This variation is greater still in the case of two-parent households or households headed by females. In Brazil, the percentage of female participation in the employment market reduces by 10% in two-parent families when there are dependent children. However, single-parent families headed by women, even when there are dependent children, continue to maintain a high level of participation in the employment market. This factor shows how the non-existence of adequate policies and services decreases the presence of married women in the labor market whereas in the case of single-parent families headed by women, it demonstrates the difficulty or impossibility of women to delegate this reproductive work, which leads them to maintain a high level of participation in the labor market.

When child care is reserved for women, it reduces their availability for full-time work. Equally, having children also reduces their income from remunerated work. Some studies show that the salary gap between single mothers and married or attached women without children is very significant. Women without children earn 67% more than women with young children. In other words, the great advantages in terms of women's incomes would seem to be produced in the phase in which children are young and dependent on their mothers' care and attention.

In all the case-study countries, the main source attention towards elderly people is produced in the family. With regard to the relationship between the presence of elderly people and the opportunities of work for women, in Brazil, women in two-parent homes with elderly members participate less in the employment market than those who do not have to assume the responsibility for such elderly family members. The studies also demonstrate a trend towards a number of adult offspring who depend economically on their parents over 65 years of age. The economic contribution of elderly adults to family incomes is particularly significant in poorer families, which represents 66.3%. In Costa Rica, the average number of elderly people of 59 years of age in poor household was 67% more than in more affluent households.

Finally, the studies repeatedly show that the poorest women, teenage mothers and the elderly are the main subjects of the lack of reconciliation between production and reproduction in the region. The lack of access to care, reproductive health and education services aggravates this situation.

We feel that we are at a time in the region to demand a deepening of the gender equality agenda. Modernity in Latin America has established contradictory consensus. While demographic transition was produced and women accessed the labor market, the logic of the organization of the social and reproductive work spheres remained intact. Undoubtedly, the agenda of women has made important advances in the region. However, it is certain that in the coming years, the tensions between the productive and reproductive roles of women will become more acute. The combination of factors such as the unstoppable fall in pregnancy rates, population aging and the persistent presence of an increasing number of women in the employment market, the diversification of family structures and arrangements and the transformation of the world of employment will require new reconciliation strategies, but above all, recognition that reconciliation represents a problem of social and gender inequalities that must be resolved. The migratory factor is transversal to this situation.

Reconsideration policies form and access of discussion between family, State and the market from a focus of gender and rights in order to progress towards a social reorganization proposal based on the promotion of social cohesion. This is understood as the strengthening of social relationships of shared values of a feeling of belonging to the community and the trust among members of a society, as well as being conceived from their perspective of eradicating the inequality and the disparities. As a consequence, reconsideration policies may be seen, on one hand, as an articulating and ordering

principles of public policies from the perspective of gender and social cohesion and on the other, as public policies focused on guaranteeing a collective solution for the progressive overcoming of the inequalities derived from sexual division of work and also to provide a response to the growing demands for care in modern societies. From this perspective, interventions driven by the UNFPA offices, such as the approval of a law against the expulsion of pregnant teenagers from schools in Panama, the responsible parenting law in Costa Rica and the prevention of sexual abuse in the educational system in Ecuador, to mention but a few examples, undoubtedly constitute reconsideration proposals. Equally, interventions in sexual health and reproductive matters aimed at teenagers and young people and the policies for elderly people must also be understood as initiatives intended to guarantee greater reconciliation between the productive and reproductive spheres.

As shown in the XXXVIII Meeting of the Board of the CEPAL Regional Conference on Women, held in Mar del Plata (Argentina) in November 2005, the gender agenda in the region is already making the first steps toward the integration of the issues of the economics of care and reconciliation between the productive and reproductive spheres. The socio-demographic, economic, political and cultural changes in the region will more and more lead to a greater presence of the issue in public agendas both from a substantive and transversal perspective in a wide spectrum of public policies, not only in relation to gender policies. Therefore, the UNFPA expects to continue contributing to purposeful reflections and proposals in this field which we hope will be enriched by the meeting we are commencing today.



**EDGAR VON KNEBEL**

Regional Director for Central America, Mexico and the Caribbean  
German Technical Cooperation (GTZ)  
Germany

Good morning to everyone. I would like to start by greeting the participants in this panel: Mrs. Patricia Espinosa, Director of Mexico's Women's Institute, Mrs. Rebeca Grynspan, Director of the National Commission for Latin America in Mexico, and Mrs. Marisela Padrón, Regional Director of the Latin America and the Caribbean Division of the United Nations Population Fund, an institution we have had the pleasure to work with over the course of the last few years in the areas of budgeting and gender, and with which in 2004 we set out to explore the line of work of reconciliation policies we will be dealing with these days.

The issue of policies aimed at reconciling the productive and reproductive spheres is a core of themes that encourages us to think relationally of concepts traditionally approached in an isolated fashion: the objective of women's economic and reproductive autonomy, both of them clear in efforts towards gender equity in the North and South, can not be pursued without actively rethinking aspects such as labor policies, pension systems and options for the care of children and other dependants. In Western Europe, for example, population aging, in addition to transformations in the labor market, and specifically with the mass incorporation of women, along with men, to paid work, is choking traditional care systems based on unpaid work, which is being disproportionately done by women everywhere in the world.

Birthrates in Europe have dropped dramatically. Still, empirical research has found that, in general, governments implementing measures for people, and women in particular, have been able to reconcile and harmonize motherhood (or fatherhood) and paid work. In Scandinavian countries, for example, birthrates have declined less compared to other countries, like Spain or Italy, where, despite the existence of "family" or "pro-family" discourses, there are no measures actively helping people succeed in both aspects of life. And that is why, even in these countries, the issue of reconciliation has found a spot in the public agenda with the purpose of revitalizing birthrates.

In many cases, women having invested the most in their professional lives are the ones forced to quit family-wise: according to OECD's research conducted in Switzerland, almost 40 % of women age 40 with university studies do not have children. And we can not say the perceived presence of dependants –whether boys, girls or elderly people– is a merely "psychological" obstacle to the legitimate objective of getting promotions: studies in different countries confirm it is a key factor. An ECLAC study in Costa Rica recently confirmed that, in the financial sector, there is no statistical difference in the number of children of men and women in lower work levels; however, in the case of upper levels, the presence of children is a significant factor for women, while male work participation is not affected by their presence.

In Nordic European countries, the network of measures implemented to ensure women's participation in the labor market has allowed women in these countries to achieve a broad representation in the active population. However, these measures have not reduced the notorious gender-segmentation systems in these countries; empirical analysis has revealed that, despite their remarkable progress towards gender equity, there is still some sort of segregation where women are mostly hired in the public sector, and less than men in the private sector. In other words, it might well be that the private sector still lacks the willingness to contribute, thus absorbing reproductive costs proportionally to their capacity to hire male and female workers. This cost is possibly being rejected due to its impact in economic terms or in terms of the temporary absence from the workplace resulting from

maternity leaves, with paternity leaves being requested only marginally despite their clear inclusion as an existing right in legislation and policies.

At this point, it is important to highlight the cultural nature of those aspects related to reconciliation policies and care of dependants, which ultimately has to do with the organization of family, work and personal life. Measures adopted and policies implemented can not ignore the cultural aspect, that of judgments and prejudices. Studies conducted in the European Union show that, for example, in Austria there is still a broad consensus around the fact that the best child development is achieved through maternal care at home. However, these perceptions have not been validated by research done so far: research in the United States, Costa Rica and Brazil shows that children who have attended quality child care centers and have been stimulated in them show a positive intellectual and social development at an early age and are less prone to low school performance later in life. In Germany, my country, there are also significant cultural differences in the perception of these topics between the East and West despite the years that have passed since the reunification. In East Germany, as you know, the incorporation of women's paid work and the existence of networks of child care centers was very common. The offer of spots in these centers in East Germany is still proportionally lower than the existing demand compared to West Germany. In addition, qualitative studies have shown that, while in East Germany women believe sending their children to these centers is positive for their development, in West Germany many women have the perception that, if they work out of their home and their children are taken care of in nursing homes during their first years, children will either suffer in the future as a result of the "lack of maternal care" or they will have to confront social disapproval from their quality social networks, which will question the quality with which they fulfill their "role as a mother" as a result of joining the paid labor force despite having young children.

On the other hand, male participation in reproductive work, including care work, has not evolved at the same pace as women's incorporation into the paid labor force. Time-use studies continue to show the same pattern in different regions. This gap continues to set the tone in terms of reconciliation possibilities and options available in terms of public policies. The social verdict on women's appropriate or inappropriate behavior, particularly children, is not that harsh if applied to men. Women facing this sentence, judgment or social opinion tend to internalize them, which might help explain why the level of perceived responsibility, of "guilt" regarding care of dependants, tends to be lower among males.

In my country, which I will use again as an example to illustrate the fact that this issue is key in the North and South –as well as a link between the North and South despite the fact it is expressed in different forms–, we can see that a very large number of migrants authorized to enter the country legally do so to work in people care activities, particularly elderly people. Migratory groups in receiving countries act to mitigate imbalances, the contradictions of a system with huge deficiencies in terms of proposals to harmonize the personal, family and work life spheres.

The limited appreciation for this type of care activities can be found in the unsteady conditions of so many people, particularly women, who work in this field. In many countries in the North people working at the lower levels of the health system, particularly women carrying out care activities, live in highly unsteady conditions compared to other occupations. This, for example, also applies to those carrying out care activities individually and hired by other people, both covered and not covered by national health systems. In Latin America and other countries in the South, this reflects the extremely unsteady conditions in which paid domestic workers do their job; we are talking of women with a poor social background, who work with little social protection and are often times highly vulnerable to poverty.

In Spain the government, aware of this situation, pioneered efforts in this regard by passing the Universal Dependence Law, under which dependants will have access to the care services they need, regardless of their financial situation, that is, not necessarily resorting to the market to find that care. This perspective recognizes the need for care in human

societies and assumes care as a human right and, consequently, lack of care as an insult to human dignity.

Obviously, a law like this demands resources. However, in addition to being a possible insult to human dignity, failure to provide care to people needing it also entails economic and social costs and exacerbates inequality and social cohesion problems. Women's lack of participation in the labor market resulting from their disproportionate care responsibilities increases the possibility of poverty for their families. ECLAC and OECD's figures show that women's participation in the economically active population in all countries reduces the likelihood of poverty for their families. On the other hand, reproduction is a social need, and it is unfair, under the excuse of biological differences, to make it fall excessively on women.

Ignoring the economic, social and personal tensions caused by a system failing to promote reconciliation between men and women for the achievement of their work and personal/family objectives equals the future deepening of a serious conflict expressed in social and gender inequality, both in the labor market and in pension systems, as well as relationships between countries, such as we have established by mentioning migration for care of dependants in developed countries. From the standpoint of public policies, a long-term perspective, a more comprehensive one, would show investing in this field of reconciliation is not an expenditure, but an investment in economic sustainability, social and gender justice, child development and social cohesion.

It is from this perspective that I believe this meeting highlights a very important issue that has been historically postponed as a result of the "naturalization" of problems related thereto; the "naturalization" of socially establishing that care is the responsibility of women and, where paid, it should be the responsibility of poor women or women from poorer countries, who must do their job in unsteady conditions. The reconciliation sphere integrates both the economic and the social and it can provide an element of coherence that has not emerged automatically or easily from a historical point of view. I would like to wrap up by hoping this meeting is highly useful to all of you here, and also that it can contribute to strengthening this work field in the region, as well as the work done by our organizations.





**REBECA GRYNSPAN**

Regional Director for Mexico and Central America  
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Mexico

First of all, I would like to thank the United Nations Population Fund (UNFPA) and GTZ for making this joint effort, the Mexican government for their cooperation, and ECLAC for their contribution to a seminar that I am sure will be of great quality both in terms of topics and presenters.

The colleagues who spoke before me have already addressed many of the topics I would like to address. However, please let me briefly reflect on the name of this seminar. First, I would like to say the issues of social cohesion, reconciliation policies and public budgeting are key to your region. Once again, this meeting will highlight the three Achilles heels in the region's development. On one hand, inequality; on the other, unemployment and the lack of quality in the creation of jobs and, finally, fiscal performance, both with regard to income and allocation of expenditure, that is, public budgets.

I believe reconciliation policies bring these three aspects together in the discussion and, therefore, they should be key to the formulation of any development strategy attempting to link the economic and the social as two sides of the same coin. And exactly in the same way it has happened with social cohesion, the issue of equity has been marginalized from political agendas over the last two decades; we must admit the issue of the fight against poverty has been present, which is not the case of the equality of social cohesion, with one exception: the women's movement, which always had social equity in the center of their agenda. However, the public agenda on poverty has marginalized the discussion on equity and social cohesion, which are topics that encompass, but also go beyond, the dimension of poverty.

We know progress has been made in some of the areas of gender equity, particularly in terms of access to education and health. In some countries we can already see a reverse gender gap in middle-higher and college education, with a broader presence and permanence of women in the education system. However, as expressed by Patricia Espinosa, less progress has been made in the hard core of gender equity, and by hard core I mean three aspects. One is the economic aspect. In spite of our bet on gender in education, every time we look at the labor market we continue to see huge inequalities. In fact, inequalities increase with women's higher education levels. That is, in the labor market, as stated by ECLAC in their most recent *Panorama Social*, the biggest salary gaps between men and women are paired with higher education levels in the labor market. The second one is the issue of power, where we also have a hard core of inequality; the presence of women in political and political representation environments does not follow a sustained evolution unless there are good positive discrimination laws in the political arena. Countries without positive discrimination laws have failed to achieve systematic and sustained advances in the representation of women in the arenas of popular representation or the executive. And the third hard core is that of the sex/gender system, precisely the topic of our interest today; the relationship between the productive and the reproductive, the relationship between the family and the labor market, which brings us back to the reconciliation proposal. This "reconciliation" exists even if no reconciliation public policies exist. Women still reconcile; they reconcile through second and third work shifts; they reconcile by reducing birthrates; they reconcile through *outsourcing* and by generating other inequalities both in terms of household work and the migration Marisela Padrón has already referred to.

Where reconciliation policies do exist, beyond reconciliation women must do on their own, they must be identified and their impact must be analyzed. There are differential impacts,

i.e., what we can learn from Spain, Sweden or the United States is different, because different forms of reconciliation have produced different results. We know the country with the largest number of reconciliation policies, Sweden, has a labor market with huge segmentations between men and women. Half-time jobs, jobs in the public sector, are those used by women to join the market, while the presence of women in the private sphere or other spheres of productive work is much more limited. In other words, impacts are differentiated and we must learn from that.

However, most of all, I would say that when it comes to reconciliation, we must be aware of what happens in the labor market and the contribution made by the feminist economy to the comprehension of these aspects. I would like mention two elements the feminist economy has brought to discussion and which I believe are key to today's discussion. The first one is to remind ourselves that the analysis of the economy goes beyond the analysis of markets, that not all goods are produced in markets; there are goods produced and distributed in the household sphere, which leads to a broadening of the perspective of economic analysis beyond markets. The importance of this broadening lies precisely the consideration of the production of goods and services and the distribution of goods and services in the household sphere, which becomes a key element in the analysis of the labor world, where there is paid and unpaid work, an element that must also be at the core of the discussion in this seminar.

The second major proposition regarding the topic of our interest today is the analysis of the work offer. As you know, economists construe the work offer assuming the existence of individual behaviors that must choose between free time and the time we want to dedicate to work. "Free time", you can imagine, will be the work offer for women! Obviously, for women the decision has more to do with paid and unpaid work, rather than between free time and the amount of time allocated to the market. Of course, this construction of the work offer does not involve the need for reconciliation between the household and the work spheres, because the conception focuses on men, and not women's reality, that is, a conception focusing on the division of labor and the division of roles in the sex/gender system.

This new outlook of the economic should lead us to the discussion not only of social policies, but also of economic policies, thus revealing the fact that every decision regarding the "production basket" of a country is, at the same time, a decision between how paid and unpaid work intersect. In other words, the decision on what to produce is, at the same time, a decision on how to produce, not in terms of technology, but the combination between paid and unpaid work, and between unpaid household work and work in the paid labor market. What we are discussing today is precisely the issue of reconciliation policies. The idea is to influence society's decision not on what, but how to produce in terms of the organization of the family and work and the corresponding roles of men and women. In other words, when we speak about reconciliation policies, what we are actually talking about is not only how women reconcile, but how society, the market and the family reconcile beyond women, which brings the sex/gender system to discussion.

We can actually do both things; we can have reconciliation policies so women can reconcile, which obviously involves a higher dimension, as opposed to that where they do not exist. But we can also speak about reconciliation policies in terms of how society as such will reconcile work aspects related to human reproduction, care and life itself, which goes beyond the mere reconciliation of women and also incorporates men into that dimension. The third aspect I would like to mention to wrap up is the topic of public budgets with a gender-perspective, something which, in my opinion, must be undoubtedly based on the construction of a national agenda with a gender perspective and entails a proposal for the social allocation of public resources. The possibility of building the above as a process lies on the basis of furthering democracy, to the extent we can advance the social discussion on the allocation of public resources not only ex post, but ex ante; not only to control what was done, but to be able to influence what will be done. This issue ultimately links the three areas this seminar will deal with: social cohesion, reconciliation of public policies in the labor market and allocation of public resources.

I am sure that what we have ahead will be days full of debate and increased knowledge as a result of your presence here, and all I wish for these two days is for us to maintain the enthusiasm at least I feel upon starting this session. Thanks a lot.



**SESSION 1:**

**THE CONCEPTUAL FRAMEWORK REGARDING THE RECONCILIATION OF THE PRODUCTIVE AND REPRODUCTIVE SPHERES**

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## RECONCILIATION POLICIES: CONCEPTUALIZATION AND TRENDS

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### A. RECONCILIATION POLICIES

Policies aimed at reconciling the work and family spheres have evolved recently, particularly in the EU countries. There is also an emerging debate in some Latin American countries on the convenience of promoting them within their territories. That is why it would seem interesting to analyze what they consist of and what their implementation mechanisms and results have been. Bearing in mind experience already gained, the European experience allows us to separate the “wishful thinking” from actual results, including unforeseen ones.

As part of this dissertation, we will now analyze four topics that appear to be relevant to describe the State’s intervention in the field of reconciliation policies:

1. The origin. External/internal demands
2. Raising the issue and definition of objectives
3. Types of policies and measures to implement
4. Results: foreseen and unforeseen consequences

#### 1. The origin

The issue of household work was one of the contributions of modern feminism. By the 1970’s several feminist authors, such as Selma James, Maria Rosa Dalla Costa and Ann Oakley had already focused their analysis on it.<sup>1</sup> The question they asked themselves, which led to a big debate among feminists, was who would benefit –husbands or capitalists– from the fact that household work lacked economic value. At the same time, they linked it to the problem of inequality and/or women’s oppression, thus analyzing whether or not housewives should be paid for household work and making proposals in that regard.

The feminist debate around the burden of household work for women reached international organizations that, throughout the 1970’s, incorporated the issue of gender inequality into their agendas and also as proposals for their member states. Thus, the need for men and women to share family responsibilities was incorporated into the European Economic Community Social Action program in 1974 and also into the UN Declaration of the Mexico World Conference in 1975 (in its preamble).

Women’s inequality was basically defined as women’s access to the public sphere. Women’s incorporation into the labor market was one of the main objectives. I believe this definition of women’s discrimination can be described as “the pending task of women’s suffrage”. Women’s right to vote emerged when the division between the male public sphere and the female private sphere was consolidated in practice. Thus, in spite of their newly acquired rights, including the right to employment, women continued to be housewives. Although many of them had a paid job, they quit it once they got married or had children, and they did not always return to it. Also, depending on economic needs, the

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<sup>1</sup> Dalla Costa, Mariarosa and Selma James. *The power of women and the Subversión of the Community*. Bristol, U.K: Falling Wall Press. 1973.

Oakley, Ann. *Housewife*. Harmondsworth, UK: Penguin Books. 1974.

labor market incorporated or expelled workers, with women always being the most affected sector.

In the 1970s, however, unlike in previous decades, at least in the EU, the incorporation of paid work took place along with a “vocation of permanence”. This led to the problem of the double presence or double work shift among women, one of the main factors contributing to work discrimination against them. And that is why it has been necessary to approach the double work shift as a political problem requiring the State’s intervention. Policies to reconcile the work and family spheres have been one of the answers to the problem.

## **2. Raising the issue and definition of objectives**

Conceptualizing the problem of the need for reconciliation must be based on the analysis of the gender system and the establishment of hierarchies leading to inequality. First of all, the gender system has three levels: personal identity, roles and social spheres. The establishment of hierarchies, that is, inequalities between men and women, not only exists among people, but also within the roles and the spheres where people perform these roles. From there, the absolute invisibility of women and the fact that Social Sciences suggested a theory only speaking about one half of society, while the other half did not exist.

In modern society, the sexual division of labor led to a clear dichotomy between the public and private spheres and the roles performed in them. Participation in one or the other became the source of inequality. The family, the main institution in the private sphere, was organized based on the “breadwinner” model. This meant that men were responsible for getting financial resources in the public sphere and women, as housewives, were in charge of care and household chores in the private sphere. This division model became an identity mechanism for men and women that has contributed to its stability and has made changes difficult, even where women access the public sphere.

However, inequality can not only be defined from the perspective of the sexual division of labor and the division between the public and private spheres, but in the distribution of time it involved. The issue of time and its importance was incorporated as part of the feminist reflection. That reminds us that everybody has a lifespan that goes from the moment we are born to the moment we die, which makes us equal all around the world. Events happening between these two moments are no longer the same, since that has to do with the distribution of this time into specific activities. Time was segmented: both in our lifespan and into units such as years, months and days.

The distribution of our time is determined by the division of social tasks. First, into productive and reproductive. However, people have, or can have, the opportunity to participate in society’s collective projects, the civic sphere, with personal or collective sociocultural projects. And then there is also the time devoted to leisure or fun. And when it comes to this distribution or possibility of using our lifetime, people are not the same. We can establish a link between time periods (life, years, months and our day-to-day life), material resources (paid/unpaid) and the distribution of activities (productive/reproductive; civic; sociocultural; fun).

The fact that the private sphere lacked a hierarchy in terms of power and material resources made it invisible. Social Sciences were not concerned about studying or getting to know it either. For this reason, the feminist movement’s first demand and task was that of making everything happening in this sphere visible. That is where researchers set out to analyze household work and the care of both dependants (children, the sick and the elder) and non-dependants. This analysis adopted two forms: one of them analyzes the time devoted to household activities, while the other assigns an economic value usually calculated based on what their cost would be if carried out as paid work.

Once the problem of household work and its repercussion on women’s double work shift was identified, the objectives to be met were defined. As already stated, the first feminist proposal consisted of redistributing roles between both spheres as a way of eliminating the



hierarchy and inequality between them. This demand was defined as that of men and women sharing tasks in the public and private spheres. That involved the redistribution of roles on all levels. But it also involved, as pointed out by the feminist analysis of the 70s and 80s, structural changes in the organization of society.

Based on this brief introduction, which highlights certain basic concepts, we will now address reconciliation policies as a type of policies to confront the problem.

### **3. Types of policies and measures to implement**

Reconciliation policies are one type of gender policies. In this regard, we must begin by stating that they have adopted different strategies towards gender equity. We will refer to three of them: equal opportunities; positive action and the pursuit of structural changes.

The equal opportunities strategy seeks women's access to the public world. It is a typical strategy with people as its objective. The idea is for people to have equal opportunities when it comes to performing roles. In the case of women, the idea is for them to have the same opportunities to join the public sphere. In other words, we refer to the pending task of women's suffrage, but now with the vocation of permanence represented by the contribution of modern feminism. Its main emphasis is on women's education and the elimination of discriminatory laws.

The positive action strategy seeks a new balance between men and women in the public world. When women access the public world they do it with their feminine roles, which are also hierarchized, on their shoulders. For this reason, education does not allow for the possibility of performing roles in the public sphere like men do. In Spain, for example, a big effort was made to encourage women to join masculinized university careers, such as engineering. However, the labor market does not see a neutral engineer, and by 2000 the unemployment rate for women engineers was four times higher compared to male engineers. This happens because every time women join the public sphere they are the object of horizontal segregation (activities with gender) and vertical segregation (women can not access upper levels). These two types of segregation generate inequality between men and women. Positive action is an answer to these forms of inequality in the public sphere.

Finally, there is a third type of strategy, that of structural changes for the reorganization of the sexual division of labor in all spheres. It proposes changing the structural bases of inequality, that is, the division between the hierarchized private and public spheres. The reason is that it is in this division where inequality is produced, affecting all the different levels and characteristics of the gender system.

These three strategies are all necessary and interrelated. The priority of one or another agenda depends on the inequality problems gender policies are applied to or the historic moments where they take place. There is no hierarchy between them. However, if major changes are sought, measures falling within the three types of strategies must be found.

There are many types of gender policies depending on their thematic objectives. One of them, considering the topic of our interest (that of reconciling family and employment), is that of employment policies. They have been really important in recent times. First and foremost, as a result of the vocation of permanence in the labor market women currently have. In the past, they were a group coming in and out of the paid work sphere and, as such, the labor market was the one with the final say on their permanence. Today, however, the State, through its policies, is the one seeking to ensure women can stay in the labor market. And it is for this reason that new types of employment policies for women have been developed.

### 3.1 Employment policies

It is important to highlight two different types of employment policies implemented so far: one, those promoting women's employment and, two, those aimed at addressing gender horizontal and vertical segregation in the labor market. The former seek paid work for women, that is, for women to join the labor market and stay in it once they get a job. These policies aim at fighting female unemployment and the obstacles set by some businesspeople upon hiring them. Although these policies allow one first approach to women's inequality, that is, access, as already stated, once they join the labor market inequalities with men in it arise.

If entering the workforce occurs without questioning gender role inequalities, women's work segregation appears, to the extent worst paid female professions appear, a fact leading to salary inequality and the glass ceiling, the limitation to reach higher professional levels. For this reason, employment promotion policies must be linked to other measures to fight segregation. In fact, it is important to point out that, if this type of women's access to the labor market is not questioned, employment promotion policies can contribute to gender segregation. Thus, we must implement a new type of policies, those seeking equality in salary levels, work conditions and jobs available to men and women.

Now well, a large part of the problem is the result of what numerous female authors<sup>2</sup> have called the "productivist logic", where employment assumed the worker's full availability. This was applicable to any type of work and reflected men's social situation and experience. For men joining the labor market is the core of their life and defines their use of time. That is how work time becomes the category organizing life (education-work-retirement). In the day-to-day organization of the day and year, work time is central. The time surplus is defined as "free time" without assigning specific contents to it. This definition of work time responds to a productivist culture and an anthropological definition of what individuals are.

Although this is the male reality in the public sphere, the same is not the case for women, who are responsible for tasks in the private sphere, whether they are in the labor market or not. It is important to remember that, since women's situation was invisible, there were no data on the form and mechanisms of gender work segregation until recently. Thus, employment policies for women adopted a productivist logic, considering they should be of the same type as those for men. This logic was part of the imaginary, both of those implementing policies in the Public Administration and those hired by companies or trade unions signing collective contracts. The household sphere was ignored so that, in the case of women, employment was defined based on full availability, just like it happened with men.

As women's family responsibilities became more visible, along with their influence on work inequality, studies began being conducted and policies were promoted to address the difficulties in the labor market resulting from their double presence. In Europe, where several studies on this topic were already available, it was rather obvious that the main obstacle women faced in the quest for equality at work was the responsibility for care activities in the household sphere. Based on that confirmation, activities in the private sphere, household chores and people care were incorporated into the public agenda and are no longer considered as "non-work" (the housewife as the "non-working" woman). From there the need for a different type of gender policies addressing the problem of household and care activities carried out by women at home.

The first thing they did was calculating the value of unpaid work. It is important to point out that we are speaking of voluntary household work, not the one paid as hired help, or private or public services. In Latin America, due to economic inequalities, there is cheap labor available for domestic service, which reduces the amount of voluntary domestic work. This was not the case in Europe due to the high cost of domestic service, although this has changed over the course of the last few years as a result of immigration. Many immigrant women work for little money as part of the underground economy. In fact, today's paid

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<sup>2</sup> See bibliography at the end of the article.

domestic work, just like in the past, is part of gender labor segregation. A large part of female occupations fall in this area of services, and it is an activity characterized by low professional and salary levels. To improve this situation, some trade unions affirm it is important to increase the professional category of this type of service, demanding higher education levels, which is paradoxical, as housewives always did this work without such professional requirements and nobody ever complained about its quality. Furthermore, when women were educated to become traditional housewives, like it happened in Francoism, this type of education was highly questioned because it led to inequality.

Even if a significant part of domestic and care work is paid, whether in the public or the private sector, a large part of it still exists in the family sphere, with no economic value, and is still done mostly by women. Therefore, the decision was made to implement policies aimed at relating both types of work. That is the origin of reconciliation policies.

### **3.2 Reconciliation policies**

It was on the basis of the above-mentioned considerations that the family and services rendered within it were incorporated into the imaginary of gender policies and new types of policies began being implemented. The first ones were those known as “family friendly policies”. Their main objective was the incorporation of the family and care as an area demanding measures enabling women’s equality at work. From this perspective, these policies were related to gender equity. But it was not only a matter of policies aimed at the family; the objective was for them to link domestic and paid work. That was the origin of the denomination work/family reconciliation policies.

Despite their initial incorporation as part of gender equity policies, there has been a problem regarding their conception. Gender equity policies were conceived to address women’s inequality in the public sphere. But gender is a relational category of men and women. Any response to women’s inequality is redistributive, and this clearly appears in policies for the public sphere. But in the case of policies aimed at reconciling the family and the labor market, if women are the family, unless there is a clear redistribution with men, in practice measures taken end up being aimed at women.

In any event, introducing the issue of women’s double presence in the agenda enabled an approach to domestic work and women’s contribution to it, and it was from there that promotion strategies began being devised. This has made the gender structure of society, the public/private dichotomy, visible. It is from here that it has been possible to analyze strategies both for equal opportunities and structural change along the above-mentioned lines. From this perspective, we can say there have been two types of strategies: that of reconciliation policies and that of change of times policies. The latter were mainly developed in Italy and then in Europe and are less known in Latin America, but they are also worth mentioning.

In Europe, reconciliation policies were born with two objectives: the promotion of female employment and increasing birthrates. The interest of policies in addressing women’s double presence not only revolved around solving obstacles faced by women in terms of employment as a result of their family responsibility, but the reduction of birthrates and its consequences in terms of the demographic structure. This can be seen, for example, in reconciliation policies conceived for the care of newborns or young children. Which is paradoxical, if we consider the main problem in terms of care in today’s Europe. However, it resulted from the need to provide services for the elderly, dependants and the day-to-day care of people in general.

As far as the promotion of female employment is concerned, reconciliation policies emerged as part of the women’s full employment policy. The 1997 Amsterdam Treaty identified employment as one of the main objectives of European policies. At the Lisbon Summit, in 2000, they specifically addressed women’s employment, and by 2010 the EU intends to have 60% of women in the labor market. This has been followed by a “mainstreaming” gender policy in all aspects related to European employment policies.

Reconciliation policies promoted propose two types of measures: maternity/paternity leaves and the provision of care services. Maternity leaves already existed in many European countries. They had been promoted because women quit their jobs as soon as they had children, and once they went back to work they had to be retrained to handle new changes, as well as new labor markets. But leaves allowed them to stay in the labor market. The breakthrough was that men can also request leaves. In other words, changes sought to break traditional gender roles in the household.

As far as the provision of care services is concerned, the old Welfare State tradition of providing services is still there. These services continue to be significant in the case of child care. More services for the elder and dependants have been incorporated now, but in Spain they are almost inexistent. In Barcelona, for example, the city mayor still believes a nursing home is some sort of asylum and maintains that people in this group have the right to be cared for in the family<sup>3</sup>. And he does not oppose the idea for economic reasons (because he has not calculated the cost yet, and when he does he may even become a strong opponent) but because in his imaginary a nursing home has an element of denigration to it.

In European countries, where reconciliation policies already have several years of experience, evaluations on their impact have been conducted. Studies so far show they have only served for women to reconcile, as they continue to assume care is their responsibility. Women are the ones using them, and their measures have only served to facilitate women's double shift and double presence in the public and private spheres. Labor policies have not only failed to enable the incorporation of men into household work; studies also show they have tended to increase women's job instability.

Women's permanence in the workforce resulting from reconciliation measures has extended employment to female half-time work, thus contributing to labor segregation. Torns (2005) states the social rule on work denies the existence of people care, household-family maintenance and domestic-family tasks. Citizens' rights and duties are mediated by dependence from a "head of household". And social representations of the above-mentioned family model attribute several characteristics, allegedly innate in wives and mothers, to women. It is a full group of factors making it difficult for them to have access to full-time employment. And they turn a large part of actions aimed at reconciling work and family life into wet paper.

Good "family friendly" practices have been promoted in many companies. However, studies also show businesspeople have only adopted them in the case of high-level professionals and top executives; in other words, employees whose work has an added value. They have not become the rule for most workers. Unions have not adopted these practices as part of their collective contracts either. Furthermore, they are only seen as measures in the HR departments of companies with a high level of professionalization.

#### **4. Results: foreseen and unforeseen consequences**

Why have reconciliation policies failed to generate the results expected? There are two interpretations, not necessarily opposite or contradictory, that will be described below. The former states the reason is that they have been implemented as employment policies, not as gender equity policies. The latter states there was a co-option process, from feminist proposals to their conversion and application as public policies.

The problem of reconciliation policies is that they were implemented as part of policies aimed at promoting employment and, in doing so, they shifted from gender to market analysis. We refer to a shift from proposals with gender relations as the core of analysis to others of an economic nature focused on the market. But this was not the only thing; they were labor proposals in a context of economic crisis. The shift not only involved strategies

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<sup>3</sup> I usually respond that the last thing I want to do when I grow older is to move in with my son and his family. That I demand a decent place where I can live, enjoy, travel, dance and, finally, die.

and policy objectives, but was also the result of a process involving a shift from decisions based on “gender equity” to “mainstreaming” in employment policies.

The drawback is that, if the logic of gender equity is not maintained in policies where this dimension should be incorporated, the predominant logic of traditional policies will prevail. And this is what has happened upon transferring reconciliation policies to units in charge of employment policies. The logic of the employment and economic policy, particularly in the European case, is the logic of international economic competition. From there the need for businesspeople to make the labor market more flexible; their concern is not that of meeting women’s needs. For this reason, half-time jobs, mostly held by women, tend to be bad and lead to labor discrimination.

The context in which employment policies have been promoted over the course of the last few years is that of the new national and global economic reality. The existence of low-cost labor markets with access resulting from globalization phenomena has led people to tend to accept worst working conditions in European countries. This has had a significant influence on employment promotion policies for women. As far as families are concerned, their main characteristic has been the cultural persistence of the “male breadwinner” family model. For this reason, no matter how much women change, both things still persist.

In this regard, Torns (2005) affirms that “the absence of a fatherly figure that can not see his children as a result of his work schedule never created significant problems and even has a broad social consensus. These male individuals neither feel the moral obligation nor have a socially attributed obligation to reconcile their work and family life. It is exactly the opposite of what happens with women, their family and work schedules and the material and symbolic obligations attributed to them. From there that the reconciliation solution is only perceived as necessary for women. And it is only seen as a requirement for child care. It is a paradoxical situation because, as soon as demographic data are known, the perception will be that the growing population aging will turn that reconciliation, or any other worthy solution, into an unavoidable need. Therefore, asking ourselves who should be the main subjects of this reconciliation is another question to add to the debate around this topic”.<sup>4</sup>

Thus, the unforeseen results of reconciliation policies include the fact that they have only served for women to reconcile. Now well, these results are the consequence of the way in which reconciliation between the family and the work spheres was proposed. In fact, if we review its history, we will find the mere concept of reconciliation emerges from the labor market. “Reconciliation” as a process referred to mediation between two opposite groups in the labor market. The partners in this reconciliation were trade unions and business organizations or, in the individual case of companies, their workers and top management. However, when applied to the family sphere, it is a space where opponents or opposites are not supposed to exist; a space assumed to be “harmonic”. We must add that collective negotiations or social agents in conflict are not recognized by the family world. Therefore, the only thing that would seem to emerge there are individual negotiations among individuals.

As pointed out, in the 1980’s the feminist proposal was that of breaking the gender dichotomy of roles. The proposal in this regard was for women and men to “share” activities both in the public and private spheres. Now, on the contrary, it is said that the right thing to do is to “reconcile” activities in the work sphere with those in the family sphere. The step of sharing (as a way of rethinking roles) and reconciling based on the productivist logic of the labor market has produced unforeseen consequences, because the context in which it was assumed was that of the “breadwinner” family model: women do household work in addition to many other activities, and men are the main financial providers for the household. Measures implemented have not changed any of these two characteristics of the modern gender system in the public and private spheres.

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<sup>4</sup> Torns, Teresa. Op. Cit. Page. 23

One second interpretation of these results of reconciliation policies is the hypothesis of the co-option of early feminist proposals. Maria Stratigaki (2004) has analyzed the shift from proposals of sharing to those of reconciling based on a contents analysis of EU official documents, from the First Social Action Program in 1974 to the conclusions of the 2002 European Council and the 2001-2005 Gender Equality Action Program. She affirms that a review of documents shows one of the concepts introduced to implement gender equity in the labor market, “reconciling work and family life” gradually shifted its meaning from an objective with a feminist potential (sharing family responsibilities between men and women) to a market-oriented one (the promotion of flexible forms of employment) as it was incorporated into the European employment strategy of the 90s.

And that was how the feminist objective of restructuring the sexual division of labor and sharing responsibilities shifted towards a conception following the logic of restructuring employment in a productivist labor market. She affirms that, upon reading these texts, she imagined the long sessions where participants had to reach consensus on a final document. In European institutions where agreements are reached, men dressed in gray are still the main participants and only a few women set a different tone. These sessions are the source of the documents changing the basis of proposals as concepts change. It is in this process of changing concepts that co-option takes place.

This co-option of feminist proposals to apply them to policies not responding to them is what has changed the contents of reconciliation policies. Every time co-option takes place two problems arise: the policy undergoes imperceptible changes because the original principle is maintained, although its initial objectives were different; but sectors demanding that policy are also demobilized. These two elements cause new policies to prevail over the original ones.

#### **4.1 Change of times policies**

We will briefly describe another option in terms of policies aimed at changing gender roles and restructuring the public and private gender spheres, that is, the change of times. These policies emerged in the 90s based on an Italian legislative draft submitted to the Italian Parliament in 1987, “Women change times”.<sup>5</sup> The idea behind the proposal was that of recovering a notion of the time linked to the activities it is used in. It aimed at questioning the productivist logic only referring to work schedules, which is not the same as time. The definition used was the one already mentioned in the beginning of this article, that is, the problem of time use in the modern gender system.

The change of times proposal translated into different public policies, particularly in the local sphere, in the 90s. In the Italian case, numerous city councils promoted “time and city” measures and policies. These measures are compulsory since the passing of a law in 2000 for all Italian cities with more than 30.00 inhabitants. The local sphere is playing a significant role in the European construction based on the principle of subsidiarity. Based on the above, it is stated that if the EU builds a new institutionality from the top, everything that can be done at the bottom must remain there, at the local level, which is the one closest to citizens.

The objective of time policies is to take municipal services closer to citizens via actions bearing in mind the jobs and times women and men demand and need in their everyday life. They use instruments such as city regulation plans, time offices, time banks, etc. This then translates into work, commercial and transportation schedules, etc. In other words, the functioning of the city life. For the most part, they want cities to be friendly to women so they can be friendly to everyone; that is, cities actually enabling the well-being of people in their everyday life.

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<sup>5</sup> Dalle donne, la forza delle donne. Documento a cura della Sezione femminile della Direzione del PCI. April 1987.

## B. FUTURE GUIDELINES

There is no doubt progress has been made in incorporating women into the public sphere, employment, politics, culture and society. Women no longer assume the role of wives and housewives as the only one, and they no longer accept power only belongs to men. Still, inequality has also reproduced in the public sphere. Although it is no longer considered only men should participate in it, there is still a gender dimension in roles leading to horizontal and vertical segregation, a source of discrimination. But if the public sphere already belongs to both men and women, the private sphere and its functions continue to be feminine. Male incorporation into it is almost testimonial.

Gender hierarchies between the two spheres rendered care and domestic work activities in the family invisible. Women's presence in it was never considered an economic contribution, and even though it was said it was important, it was only considered a women's task, with the resulting devaluation. Getting rid of this definition is crucial to question the sexual division of labor generating it. This assumes deep changes both in the identity of men and women and social organization itself.

From this perspective, policies aimed at restructuring this division between one type of activities and another, whether sharing or reconciling, are necessary. But, as explained before, if we fail to question the basic model generating the problem, that is, a definition of labor only in terms of production in the labor market (productivist logic), and the need for society as a whole to take care of services produced in the family is not incorporated, it will be something difficult to solve. For this reason, we must put an end to the dichotomy, and for that we must resort to a universal caregiver/worker-worker/caregiver universal model. This demands the commitment to provide care time and associated services of quality that are also affordable.

Lewis and Giullari (2005) state that for all individuals, particularly women, to have an actual possibility of choosing, public policies are required in the following areas:

- Time: work time and care time.
- Money: to buy care and for caregivers.
- Services to care for children, the elder and dependants.

These three public policies must be implemented both at the individual and family level and the collective level. At the household level, we are speaking of the provision of financial resources, money and time deducted from labor time, both for men and women. At the collective level, it is necessary to provide public services, to which end resources currently allocated must be increased. However, it is also important for the labor market to assess things not only based on the number of hours spent, but on activities actually carried out. The assumption that workers do not have anything else to do and have full availability has led to an increase, most of the times unnecessarily, in the number of hours allocated. In addition, new technologies allow the reduction of the work shift.

Finally, I would like to make a comment on the issue of social cohesion, which is part of the title of this seminar. The Welfare State and social policies were a response to economic inequalities. It was born out of a social pact between the two central collectives in the labor market; workers and businessmen. Social cohesion was sought in the development of three types of policies:

- Economic policy: to have material resources.
- Redistributive policy: the fiscal policy.
- Social policy: social rights emerging from the labor market.

If there is an interest in putting an end to gender inequality as a form of reaching social cohesion, this must be redefined based on the gender relations perspective. Economic policy must be based on the fact that the economy not only refers to paid work; unpaid work must also be incorporated. Redistribution must not only deal with resources; time and

activities must also be redistributed, which can not be solved via fiscal policies; other types of policies must be sought. Finally, social policy must be redefined; we must expand the definition of well-being, for example, as access to education and health, and also incorporate care services linked to individuals' everyday well-being. People care must no longer be considered "non-work", and it should be recognized as a right every individual has that must be guaranteed by the State.

This involves changing the anthropological concept of the individual, the basis of the productivist logic. The core must be an individual that has been able to distribute his/her lifetime into multiple activities: economic, care-related, civil, cultural, etc., so that, when the time to die comes, his/her life has been worth living.

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## THE FUTURE OF WORK IN EUROPE: DEPENDANT CARE\*

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### I. THE MEANING OF WORK

#### I.1. The words of work

Every language has different words to refer to work, with subtle difference between them. To give a well-known example, the Oxford Encyclopedic English Dictionary provides fifteen different definitions of the word “work”, and a much longer list of uses of the term in different situations. According to the first definition, work is *“the use of physical or mental effort applied in order to achieve a result”*; and it is only in its fourth meaning that work is defined as *“a job, occupation, etc., as a source of personal income.”* The same applies to the term “labour”, initially defined as *“physical or mental work”*, but also defined as the process of childbirth in its third meaning.

The Royal Academy of the Spanish Language provides five different meanings of the word *“trabajo”* in Spanish, none of them involving the condition of payment or a contractual basis.

The International Encyclopedia of Social Sciences defines workers as *“individuals producing or transforming goods or services, for their own consumption or that of others”*, again, leaving employment out of the main definition.

The only reason I have made reference to these three examples is to highlight the fact that, in the everyday use of European languages, the concept of work is very broad and is not limited, in any way whatsoever, to the idea of payment or salary. Still, legal and socioeconomic literature refers almost exclusively to the very narrow categories of paid or salaried work. The exclusion of the remaining forms of work is also common in several social movements, where corporatism and tradition privilege their own interests.

Work done by individuals not directly involved in the production of market goods is usually only subject to vicarious conceptualizations, that is, through others, conferring them a theoretical and political status of *“otherness”*. The reason for this exclusion must be sought in recent European social history, particularly in the struggles between the capital and other production factors. A specific *“work culture”*, with its own rules and vocabulary, has emerged from the struggle between employers and employees. Labor law, the labor economy and the right to organize are, as we know them today, the main results of this culture.

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## 1.2. The explicit and implicit rules regulating work

The struggle for profit sharing has been so intense and prolonged that the current European political culture has been shaped to a large extent by the resulting culture of the opposition between work and capital. It is for this reason that the citizen's model implicit in modern Constitutions is that of an autonomous, independent and free individual. Still, there is not an equivalent social and political culture allowing for the analysis of the role played by the economically dependent population. Who decides and defines their rights and obligations? Who analyzes their contribution to the well-being of individuals and societies?

At present, there are two systems of rules regulating employment: we refer to the explicit and implicit systems of rules. Explicit rules refer, above all, to the regulation of paid work, encoding employees' rights and obligations. There is a large volume of information on these topics, and a reference framework is being developed in Europe, both from the legal and statistical perspectives.

The implicit system of rules around work, mostly limited to the so-called "*sphere of private relations*", is highly resistant to encoding and change.

The interpretation of formal work rules is mainly based on an individualistic position. However, implicit rules are generally based on "community" positions or perspectives where the interest of the individual worker is subordinated to broader interests (the interest of the family, class, the State, etc.)

## 1.3. Types of workers in Europe: potential conflicts of interest and tensions

Due to the extensive incorporation of work into the production of goods, a significant part of work has also become a commodity. There are currently four major types of potential tensions between the different types of work and the remaining production factors, the reconciliation of which must be an important objective for political and social forces. These potential tensions or contradictions are the following:

1. The potential tension between *paid* workers and the *owners* of the capital and production means.
2. Workers who have a *job*, compared to the unemployed.
3. "Acceptable" workers (legal aliens, legal residents, non-discriminated workers, etc.) compared to the "non-acceptable" ones. Acceptance criteria particularly affect illegal immigrant workers.
4. *Paid* workers compared to *unpaid* workers.

The pressure of money on the rest of the productive resources in European economies is so strong that little attention is paid to any other type of work other than that exchanged for money. The work/merchandise, which is only one of the different types of work, has apparently devoured, or absorbed, the remaining types of work. However, what each society uses as the basis to provide livelihood and well-being to its members is the sum of all forms of work. This situation is unacceptable from a political, intellectual or social standpoint, but so far little attention has been paid to it, with even less complaints. In the average statistical or economic vocabulary, for example, workers outside the labor market (that is, those who do not sell their time as a commodity), are labeled as "*non-active*", "*dependent*" or "*unproductive*", regardless of the actual number of unpaid work hours or how necessary their work is for the subsistence of their fellow citizens.

Since unpaid labor has been attributed to a scarcely organized population, with a very limited threatening and negotiation capacity, the invisibility of unpaid labor has been impressive all over Europe. It has only been in recent dates, at the request of women's movements, that both the United Nations and European national governments have initiated efforts to learn about, value and change the current distribution of the global workload between paid and unpaid workers.

On the other hand, even the work/merchandise becomes easily subordinated to goods and the attainment of benefits; in fact, the most recent effort to build Europe as a social and political unit was preceded by the movement to build a common market or an economic community. In the short and mid-term, nothing but the firm desire to achieve a unified Europe can guarantee that the interests of workers and citizens prevail over the ultimate interests of transnational companies.

Post-Fordism (flexibility, diversity, mobility, decentralization and internationalization) does not guarantee paid workers, not to mention the rest of workers, will get preferential treatment in the future. In this context, "time" is almost exclusively "work time", time as a service exchanged for money at the workplace.

As stated by Vaiou (1998), the question proposed is to what extent debate around labor has been equally relevant for: a) the countries and places where Fordism has not been the predominant or prevalent form of organizing, among other things, work and time. In other words, the places where informal activities and atypical forms of work occur are an important part of economic and social development. b) the groups or individuals whose everyday life is not exclusively or mainly organized around the labor market. This is the situation of women, most of whose time is spent in caring for others and doing unpaid work, and whose work experience differs a lot more from the "average worker" model compared to males. In both cases, very specific and different forms of organizing time prevail. The starting point is that, historically, women and men have lived almost opposite time structuring experiences. The wealth of differences in terms of contents between paid and unpaid work prevents us from thinking in dichotomous terms, even as a starting point. For men, paid work is both a right and an obligation, a powerful civil right universally recognized in the public discourse. However, for women it is a weak civil right that must be claimed constantly. Unpaid work is, on the other hand, a social obligation for all women, defined through the organization of everyday life, with no time limits clearly set (Bimbi, Del Re, 1997). The contents of unpaid work, and its consequences, are usually considered as a "free choice" for women: but freedom is reduced as a result of the weight of cultural rules and socially accepted practices, as well as resources actually available. Men, to a varying degree depending on the place, are relieved of the burden and responsibility of unpaid work and its resulting losses.

## II. THE ACCOUNTING OF WEALTH

### II.1. Monetized wealth in Europe.

Statistics are mirrors of reality, and economic and social reality is always seen from the observer's perspective. Even if the observer wants to be neutral and objective, the perspective is inevitable in Social Sciences. For this reason, conventions and traditions are important to the social organization of Science, and paradigms are an everyday research tool, even if they are not explicitly recognized. The stronger the light or focus on a given topic, the weaker the light and focus on the ensuing topics or perspectives. Conventions or paradigms define what must be studied in a specific field of research, as well as the appropriate way of doing it. The implicit innovation always involves a certain degree of opposition to predominant topics and research styles. To the extent work has been a socioeconomic research topic, it has been quantified and more value has been assigned to it. Statistics available for European countries show that wealth and growth are almost exclusively measured based on monetary parameters.

Natural resources and net worth are a less frequent research objective compared to production or income. As can be seen in Table II.1.1, the European gross domestic product (GDP) per capita at current prices (in US dollars, 1990) ranges from 3,418 dollars (Turkey) to 57,379 (Luxemburg). Growth rates, as a percentage compared to the previous year, range from a negative growth rate (-1.3 for Portugal) to a maximum one (5.8 for Turkey), which are different from reference rates for previous decades, although other sources show that, as a whole, all European countries experienced positive GDP increments in the previous decade. Also important are the differences in the proportion of the national income compared to the GDP. In most European countries the national income is lower than the GDP, but in some cases and years it is the same or even higher.

**Table II.1.1.**  
**The framework of monetized economy, circa 2003.**

	(1)	(2)	(8)
	Gross Domestic Product (GDP) per capita at current prices* (US \$)	(%) Annual growth rates (2003)	(%) Government Expenditure in final consumption compared to GDP (circa 2003)
Austria	31187	0.7	18.7
Belgium	29257	1.1	22.8
Czech Republic	8834	2.9	23.1
Denmark	39497	0.0	26.5
Finland	31069	1.9	22.1
France	29222	0.5	24.3
Germany	29137	-0.1	19.3
Greece	15690	4.3	15.5
Hungary	8384	2.9	24.0
Iceland	36328	4.0	26.4
Ireland	38864	3.4	15.1
Italy	25527	0.3	18.8
Luxemburg	57379	1.2	18.6
The Netherlands	31759	-0.8	24.5
Norway	48881	0.3	22.6
Poland	5355	2.4	17.8
Portugal	14645	-1.3	21.1
Spain	20424	2.4	17.9
Sweden	33925	1.6	28.3
Switzerland	43486	-0.5	11.7
Turkey	3418	5.8	13.6
United Kingdom	30355	2.3	21.1

**Source:** Prepared by Durán M.A. with data from the United Nations "Statistical Yearbook 2005" (49<sup>th</sup> issue) Vid. pp.: 137-154, New York, 2005.

The GDP abstract figures become more realistic when weighed with the purchasing power or the population occupied, instead of doing it with all the population. The wealthiest country (Luxemburg) ranks first in all indicators, but many countries hold different positions depending on the way indices are weighed. There are countries with a high level of prices or a high level of work incorporated into the production of goods that rank lower, and the opposite is the case of countries with low price levels or a low occupation rate.

To complete this first reflection on Europe's monetary and economic framework, we must consider the final expenditure index of governments (GFD) compared to the GDP.

Governments in Europe play a key role as providers of public resources. In all European countries, the final consumption of the government is somewhere between 13% and 28% of the Gross Domestic Product. In other words, governments have different volumes of resources to provide support or solve citizens' needs. Differences not only exist in terms of quantity or wealth, but in the country's productive structure, in the relationship between the public and private spheres and in the activities of volunteers or non-profit activities encouraged by governments. Scandinavian countries, with a highly developed network of public services, redistribute more than 22% of their Gross Domestic Product via services. In countries with a socialist tradition, such as the Czech Republic or Hungary, this distribution is also high. European countries with a lower volume of public expenditure include some of those with the highest GDP per capita (Switzerland) and the lowest (Turkey). The rest of the countries hold intermediate positions.

In countries with a developed public sector, the population's integration into the labor market, both for men and women, is common, although not to the same extent. The high final level of consumption by the government helps facilitate the population's participation in the labor market, although it is not a completely decisive factor.

## II.2. The Role of Work in the National System of Accounts.

The European National System of Accounts provides a homogeneous framework to analyze the contribution of different production and consumption factors in all European countries. Concepts are defined in the same fashion everywhere, so the comparison between countries and years is easier. The national system of accounts includes monetized resources almost exclusively. As far as work is concerned, economic value has nothing to do with pleasure or the personal or social usefulness work generates. The value assigned to work derives from the price obtained in the market, regardless of its moral or legal condition. In the non-profit sector, such as government activities, the cost of labor is almost identical to the value of production, because the benefit does not exist, and the same applies to services provided by this sector.

The underground economy, hidden but not illegal, accounts for somewhere between 7% and 20% of the labor force in Europe, according to reports by the European Commission. The lowest GDP rate generated in this sector corresponds to Finland, and the highest to Greece. There is a broad community debate around this topic, which must be included in proposals for unemployment programs submitted to governments. The OECD report entitled "Employment Outlook, 2004" includes a very innovative and interesting section about NOEs, an acronym summarizing the concept of "Non Observed Economies". In the case of Spain, estimates show the "economy in the shadow" might account for 17% of the GDP, a figure easily surpassed by other countries.

The Spanish case in 2003 has been analyzed as an example of the treatment of work in the National System of Accounts, which is the same in every country. Payments to salaried workers, which account for 49.7% of the GDP, are easy to estimate. Something more difficult is the calculation of the quantity, price and value of work done by unpaid workers who are self-employed or work as businesspeople or on commission, whose contribution is part of the net benefit. The analysis of the socioeconomic conditions of these workers in Spain makes it reasonable to assign to their work the same average value per capita as that assigned to salaried workers (qualification, etc.). According to its National System of Accounts, in 2003 2,656,000 out of 16,904,000 jobs corresponded to unsalaried workers, that is, an 18.6% increase in the number of jobs. Consequently, the total contribution of labor to the GDP can be estimated at 60% (the contributions of salaried workers plus those of unsalaried workers). One difficult decision is that of assigning a monetary value to unpaid work. As explained below, numerous studies are currently being conducted in Europe based on time use surveys. These include those promoted by EUROSTAT (the European Statistics Office), because they standardize research methodologies. There are also other pioneer studies of great value, such as those conducted by *Consejo Superior de Investigaciones Científicas* (CSIC) in Spain, particularly aimed at understanding and assessing unpaid work done in households, particularly care work.

From a more global and comprehensive perspective, unpaid work can not be considered the only type of work providing well-being and wealth to the European society. It is, in fact, the only one considered in the current National System of Accounts. This form of construing reality renders women's labor invisible, particularly in countries where relatively few women exist in the labor market. In order to overcome this invisibility, the Beijing UN Conference agreed upon the introduction of changes in the National System of Accounts via satellite accounts. Both from a technical and political standpoint, this is not an easy task, although the need for such socioeconomic tool or instrument is gradually being recognized by governments and analysts (better sooner than later). There are at least three major problems to solve: a) the lack of data on unpaid work, b) the difficulty in assigning a value thereto, c) based on the convention, the incorporation of new estimates into the traditional system represented by the current National Systems of Accounts. None of them is impossible to solve, but all of them require resources (funding, etc.) and a certain capacity to take risks if we want the effort to go beyond mere words and verbal or formal agreements.

### II.3. Paid and unpaid work in the European Union and the United States.

Table II.3.1. allows, for the first time, a comparison of recent data available for Spain, other European countries and the United States.

Time use responds to different social models. It reflects different patterns in the distribution of paid and unpaid work, different forms of distributing work by gender, and several ways of distributing time between work and other activities.

Data available for international comparison are poorly disaggregated, which should not make us forget about regional differences in each country or differences by age, social classes and other cultural and economic variables. Also, we can not forget that, for the sake of better comparison, the most homogeneous sources have been selected, such as the European Time Use surveys promoted by Eurostat using the time diary methodology. These sources have significant drawbacks, such as their high cost, which makes it difficult to repeat studies and, consequently, sequential analysis, due to budgeting reasons. There are other sources less costly that can be more appropriate for some purposes. As far as results are concerned, the main drawback of Eurostat's methodology is the fact that it fails to gather good data on care activities due to its simultaneous and secondary nature with respect to the main activity. Other sources using different methodologies gather higher figures in some activities characteristic of women not involving physical transformations and carried out in the same household, such as the care of children, the elderly and the sick, or the management of family and domestic matters. Estimates of time spent in physical transformation tasks in households (cooking, cleaning) are similar whether you use the methodology of EUROSTAT, the Statistical Office of the European Communities or CSIC, *Consejo Superior de Investigaciones Científicas*, but estimates of time spent in care activities are highly variable. EUROSTAT's methodology focuses on the main concrete activity, while care activities are usually secondary, not physical, vague and overlap with other leisure activities (for example, watching TV) or unpaid work activities (for example, cooking). CSIC's methodology is aimed at revealing time spent on care activities, which is underestimated by EUROSTAT's methodology. The result is that CSIC's estimates often triple estimates based on EUROSTAT in this category. If unpaid care work is assigned a value of 80% compared to the average value of paid work, and if estimates achieved via CSIC's methodology are used, the percentage increase of Spain's annual GDP would be in the neighborhood of 123% compared to current estimates, with the ensuing political repercussions and those in terms of comparison with other European countries with very different time distribution structures.

Still, the above-mentioned table is highly useful. Some general types are emerging that allow for the differentiation of the time distribution model in Scandinavian countries and that in post-communist and other European countries.

The most significant trait of Scandinavian countries, by comparison with the rest, is the higher degree of similarity between men and women's time distribution. In post-communist countries with less economic development and fewer public services, something that really stands out are the long work shifts typical of the global workload. Spain is characterized by the highest imbalance in the distribution of work between men and women, with long paid work shifts for men and short ones for women, while the opposite is the rule for unpaid labor; in average, the global daily workload is almost one hour longer for women. If CSIC methodology surveys, which unfortunately are not available for other countries, were used instead of doing the comparison based on surveys with Eurostat's methodology, differences would be even bigger.

Something attracting attention in some European countries is the disparity in time used for personal care and meals; in France, for example, people spend almost one more hour on that activity compared to Great Britain, both for men and women.

As regards data for the United States, we must consider methodological differences and peculiarities, both resulting from the age of respondents (all the population above 15) and the inclusion of transportation time in the corresponding activity. The global workload for

males is 99.7% that of women (in Spain, for example, it is 87%). Males' domestic load is 57% that of women (in Spain it is 30%). The study and professional workload for males is 155% (in Spain it is 194%, despite the fact that women's access to education is highly egalitarian on mid and high levels, and it contributes to leveling the index).

The interesting aspect of these data is not the data in themselves, but the fact that they question key concepts such as development, equality, well-being or wealth. And, particularly, because they make us reflect on models of society desirable and foreseeable for the coming years.

**Table A.1.**  
**Various time use models in Europe and in the United States**

C	Spain*		Scandinavian Countries**						Post-Communist Countries**						Other European Countries**						United States***			
			Finland		Sweden		Norway		Estonia		Hungary		Slovenia		Germany		Belgium		France				Great Britain	
	H	M	H	M	H	M	H	M	H	M	H	M	H	M	H	M	H	M	H	M	H	M	H	M
Free and Unspecified time	5:18	4:42	6:08	5:29	5:24	5:03	6:03	5:52	5:28	4:36	5:29	4:38	5:34	4:29	5:53	5:24	5:22	4:50	4:46	4:08	5:30	5:05	6:01	5:37
Personal Care and meals	2:35	2:33	2:01	2:06	2:11	2:28	1:47	1:58	2:15	2:08	2:31	2:19	2:13	2:08	2:33	2:43	2:40	2:43	3:01	3:02	2:04	2:16	1:53	2:04
Sleep	2:36	8:32	8:22	8:32	8:01	8:11	7:57	8:10	8:32	8:35	8:31	8:42	8:17	8:24	8:12	8:19	8:15	8:29	8:45	8:55	8:18	8:27	8:29	8:39
Travel	2:37	1:05	1:12	1:07	1:30	1:23	1:20	1:11	1:17	1:06	1:03	0:51	1:09	1:02	1:27	1:18	1:35	1:19	1:03	0:54	1:30	1:25	..	..
Domestic chores	1:34	4:41	2:16	3:56	2:18	3:42	2:22	3:47	2:48	5:02	2:39	4:57	2:39	4:57	2:21	4:11	2:38	4:32	2:22	4:30	2:18	4:15	2:37	4:18
Professional work and study	4:39	2:26	4:01	2:49	4:18	3:12	4:31	3:03	3:40	2:33	3:46	2:32	4:07	2:59	3:35	2:05	3:30	2:07	4:03	2:31	4:18	2:33	5:01	3:22
<b>Total</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>	<b>24:00</b>
Total work load (domestic + professional work and study)	<b>6:13</b>	<b>7:07</b>	<b>6:17</b>	<b>6:45</b>	<b>6:36</b>	<b>6:54</b>	<b>6:53</b>	<b>6:50</b>	<b>6:28</b>	<b>7:35</b>	<b>6:25</b>	<b>7:29</b>	<b>6:46</b>	<b>7:56</b>	<b>5:56</b>	<b>6:16</b>	<b>6:08</b>	<b>6:39</b>	<b>6:25</b>	<b>7:01</b>	<b>6:36</b>	<b>6:48</b>	<b>7:38</b>	<b>7:40</b>

Source:

Study by Durán et. Al. on Time Use in Spain micro data 2002-2003 (INE)

In Spain, the daily time average was calculated by adding average daily time from Monday to Thursday multiplied by four and the average daily time from Friday to Sunday multiplied by three.

\* EUROSTAT "How Europeans Spend Their Time. Everyday life of women and men" (Data Sourced from polls data performed between 1998 y 2002)

Data from other European countries are not included as they are not available in Eurostat study.

\*\* Bureau of Labor Statistics del U.S. Department of Labour, sourced from American Time Use Survey (ATUS) 2003

In the United States, data applies to population 15 years old plus and travel is included in each one of the main activities.

**Sample Notes:** Data correspond to population between 20 and 74 years, except United States (older than 15 years old).

**Category B notes:**

**Paid work and study**

Time dedicated to main and secondary work and related activities, rest and travel time during work hours, and job seeking.

Time dedicated to study in school and during free time.

**Domestic Work**

Domestic activities, child and adult care, gardening and pets care, shopping and services and home chores.

**Travel**

Moving and trips related to all types of activities except working hours trips.

**Sleep**

Sep at night or during day hours, waiting to sleep, sleeping time and sick in bed.

**Meals and personal care**

Meals and drinks, clothing, personal hygiene, make up, bath and shower, sexual activities and personal health care.

**Free Time**

Remaining activities are included here. For example, volunteer work and meetings, provide help to other homes, social gathering and entertainment, sports and open air activities.

Hobbies and games, TV watching, rest or do nothing and unspecified time.

In France, long time periods dedicated to rest were classified as *sleeping time* and as *free time* in other countries.



### III. SOCIAL MODELS AND FISCAL PRACTICES.

#### III.1. From political statements to budgetary concretion

Reconciling work and family life admits many ways, but at present there are two main types: those aimed at reconciling through simultaneity and those reconciling through successiveness throughout the life span.

Taxes are, along with social security, an extraordinary political and economic instrument, because their volume as a whole accounts for 33% - 50% of the GDP of countries in the European Union. It is for this reason that it is essential to learn more about the impact this system has on reconciliation between work and family life. The current level of taxation and social security payments, depending on the family and the taxpayer's salary structure, is a real mosaic of situations, with huge disparities from one country to another, and also within each country depending on the types of family. There is no comparable information for population occupied as a whole, and the comparative analysis is reduced to a very limited segment of workers, this being the reason why conclusions may not reflect the situation of other types of workers, such as independent or agricultural ones, or highly-qualified workers.

In order to analyze the impact of taxes on the income of families "reconciling" employment and parenthood, indicators have been developed that express the current penalization, via the taxpaying system, of dual-income families with children. We are speaking of indicators of taxation on personal work and social security, global taxation, flexibility and trends during the last decade.

European fiscal systems reflect the hesitation of governments with this type of families they believe are worth supporting and, in general, they deal with reconciliation by successiveness better than they do with reconciliation by simultaneity. There are three organizational principles (the progressive nature of taxes, the protection of single-income families, the individualization of social security payments) that have a significant effect on the new dual-income family model, that is, reconciliation by simultaneity. However, this is the model currently preferred by European and Spanish youth.

According to available data, Spain has an outstanding position when it comes to the non-penalization of the spouse's salary, direct taxes on work, and an intermediate position if we also consider social security.

The promotion of reconciliation between work and family life required active measures, such as those approved by the recent law to promote the reconciliation of working people's work and family life (Law 39/1999) and the even more recent "Law on the Promotion of Personal Autonomy and Dependant Care" (to be approved in 2006). But it also demands pushing the idea that reconciliation between work and family life is worth supporting from a fiscal standpoint and, therefore, actions must be taken accordingly.

Social protection in absolute figures has increased uninterruptedly over the course of the last decade in all European countries, both in terms of constant and current prices. That increase has been higher in some countries having started at a low level, such as Portugal and Spain, while other countries with the same starting point have not grown that fast. This increase has been possible thanks to the general increase in the GDP. Nevertheless, the situation is quite different in terms of relative effort.

Essential indicators include those of global allocation to social protection (in absolute terms, proportional to the country's resources measured by its GDP, or proportional to the resources directly managed by the Government), both with respect to a given year and relative to a reference year allowing us to appreciate the corresponding evolution. Rather than large global volume figures, indicators expressed per capita are the ones facilitating international comparison, particularly when weighed considering the purchasing power of each country's currency. In general terms, allocation of resources to social protection is an

indicator of the quality and quantity of this support. However, it is worth mentioning that the expenditure index is not exactly an indicator of the benefits citizens actually receive, but of their costs, and also that mismanagement can increase costs, thus preventing their translation into an actual improvement of benefits. Also, an increase or reduction in the number of people receiving the benefit (due to unemployment, retirement, etc.) alters the volume or proportionality with respect to the GDP with no changes in the quantity of the benefit received by the beneficiary; the GDP increase reduces the proportion of benefits if these remain constant in absolute terms.

In order to gage the importance of social protection assistance in the European economy, we need to remember that, in most of them, 20% of the GDP equals the total production of farming, mining and transportation combined. As far as medical expenditure covered by social protection is concerned, its volume is higher than that of agricultural production in most European countries. The distinction between strictly medical care and related assistance of a social-health nature poses different problems of an organizational type. Due to demographic changes, disabilities and chronic diseases require a higher proportion of resources compared to assistance strictly limited to healing.

**Table III.1.1**  
**Budgetary reflection of social benefits in the 1985-1994 decade**  
**(Growth rate and percentage of GDP, per capita, standard purchasing power)**

	1		2		3			4		5		6	
	Growth of benefits in constant per capita social protection		Per capita social protection benefits (PPS)* in ECUs at 1985 prices		Total expenditure in social protection (% of the GDP)			Subsidy by child ages 0-17, in ECUs at 1985 prices (1985=100)		Per capita health expenditure in PPS(*)		Health expenditure as a % of GDP	
	1985	1994	1985	1994	1985	1994	1994-1985	1985	1994	1985	1993	1985	1993
EUR 15	-	-	-	-	-	-	-	-	-	-	-	-	-
Germany	100	121	341	5298	28	31	3	100	122	1175	1815	8.7	8.6
Austria	-	-	4	-	-	-	-	-	-	992	1777	8.1	9.3
Belgium	100	118	304	4834	29	27	-2	100	101	887	1601	7.4	8.3
Denmark	100	138	319	6197	28	34	6	100	170	815	1296	6.3	6.7
Spain	100	157	141	2905	20	24	4	100	114	455	972	5.7	7.3
Finland	-	-	-	-	-	35	-	-	-	852	1363	7.3	8.8
France	100	124	321	5211	29	30	1	100	118	1090	1835	8.5	9.8
Greece	100	108	921	1562	15	16	1	100	38	284	500	4.9	5.7
The Netherlands	100	116	330	5293	32	32	0	100	88	934	1531	7.9	8.7
Ireland	100	132	146	2748	24	21	-3	100	168	569	922	7.8	6.7
Iceland	-	-	-	-	-	-	-	-	-	949	1564	7.3	8.3
Italy	100	143	229	4143	23	25	0	100	112	827	1523	7	8.5
Luxemburg	100	166	305	6441	23	25	2	100	257	1008	1993	6.2	6.9
Norway	-	-	-	-	-	-	-	-	-	816	1592	6.4	8.2
Portugal	100	219	755	2051	14	19	5	100	205	386	866	6.3	7.3
United Kingdom	100	137	242	4474	24	28	4	100	-	671	1213	5.9	7.1
Switzerland	-	-	-	-	-	-	-	-	-	1159	1266	8.9	7.5

Source: Durán et al.: based on Eurostat figures, "Visión estadística sobre Europa 1985-1995", pages. 138, 140,142 and 243

\* Purchasing Power Standard.

In the near future, regardless of how determined governments are to cut medical expenditure, this will exert a huge pressure on the allocation of increased public funding. Welfare and medical assistance are both areas characterized by growing employment, with women having a strong presence as workers in these areas. Traditional care, which is provided at home, is being transferred to institutions where women work as salaried

workers. Nevertheless, there are new growing social movements opposing institutionalization in different countries, their main argument being the desire for more privacy (for children or the sick) and more savings (for the government). In any event, paid work in personal and social services is growing, and there is an increasing proportion of workers in personal and community social services in the labor force as a whole in all European countries.

The amount of social protection reflects both a political option and its internal distribution by functions. Each country must choose whether they want to prioritize, depending on the circumstances, protection in case of disease, unemployment, occupational diseases, old age, childhood and motherhood/fatherhood.

Obviously, in addition to public budgets we have private allocations aimed at fulfilling the same protection functions that are not the subject of political negotiations, but of individual decisions regarding internal agreements in families and institutions.

In Spain, protection for the elderly (pensions, etc.) accounts for almost one half of public resources directly allocated to social protection, while health protection accounts for more than one fourth. Compared to other European countries, Spain is the country spending the largest proportion of public resources in unemployment protection. Still, we must emphasize that differences in terms of definition and classification can affect the actual homogeneity of the data, and also that there are indirect forms of protection (for example, of childhood) via other budgetary mechanisms (education, fiscal policies, etc.).

Income and property taxes represent a significant volume compared to the GDP in all the different countries. Obviously, personal taxes are not the only type of taxes, and some countries impose indirect taxes more than others, with the resulting apparently invisible effects and the difficulty in tracking them depending on income levels or family situations. The differences in taxes on work performance for a standard worker are really high, almost ten times higher in some countries compared to others. The trend towards standardization is clear. If income and property taxes and social security payments are considered as a whole, the resulting amount equals almost one half of the GDP for all European countries.

Some analysts refuse to consider social security as a work-related tax, but there is no doubt social security is an integral part of labor costs. In some countries with relatively low levels of individual taxes for manual workers, like Italy, actual taxes are close to those in Finland if social security payments are added and benefits are deducted.

Both taxes and social security fees are, to a large extent, the result of government decisions. It is for this reason that the ideological implications of the different social security and fiscal system models are so important to the world as a whole. Considering the *"imaginary average European citizen"* is a male supporting a traditional household, the implicit ideology underlying the fiscal system and social security must be openly and deeply discussed. For European women, current changes in these fields are as important as legal changes leading to access to voting were in the past.

The Social Security structure shows a significant imbalance with respect to gender in terms of payments (who has to pay, why and how much), but also in terms of benefits (who receives them, why and how much). Very little analysis has been done from this perspective. In addition to the novelty and technical difficulties of this analysis, what actually makes it more difficult is the distinction between two different values favoring women. These values are, on one hand, independence, and, on the other, support. But the analysis must be really careful if we also consider independence. Without a doubt, where financial support to households depends on women being permanently out of the labor force, their capacity or incentive to get a job is reduced.

There is also a significant gender bias from the standpoint of the final use of social security fees. Most of the payments are related to previous relations with the labor market and,

therefore, most women are excluded or receive fewer benefits than their male partners, a situation entailing a higher risk of poverty for them.

Individualization of the tax system as a model opposing that of joint taxation by household can have very complex effects. Some of these effects reinforced women's independence from their relatives or partners. However, along with this positive effect, many women receive fewer benefits as individuals compared to those they would receive as members of a household where a traditional and intense division of labor by gender is produced.

### **III.2. The taxation system and family models.**

The participation of governments in the economy of households via taxes and social transfers is certainly important. Some taxes and transfers are conditioned by the situation of individuals in the family. Thus, the complex taxation system, social security and social benefits affect both paid and unpaid work. The absence of political and fiscal measures is an important political condition, and the effects resulting from the "*non-intervention*" or "*non-consideration*" of family circumstances bring along several consequences that are as real as the intervention itself.

The taxation system is part of the same economic structure found in households. Taxes are imposed on household resources, but only monetized ones; they are based on the non-explicit assumption that work not sold in the market fails to regenerate wealth or, at least, it is not taxable wealth. Under the taxation system, a couple with 16 working hours a day, half of them paid and the other half unpaid, is the same as another couple with 8 hours of paid work and 0 hours of unpaid work (for example, because one of the partners is sick or is engaged in political, religious or leisure activities, or goes to school).

Under the taxation system, dual-income couples raise a conflict between two values: that of individuality and that of the progressive nature of taxes for those with higher incomes. In Spain, for several years joint taxation via the IRPF (personal income tax) was a punishment to a partner's work, and it was not solved via changes in the fiscal system itself, but judicially, after a case brought by an individual taxpayer (ruling of the Constitutional Court of February 20, 1989).

The conversion of unpaid work in household chores into paid work is, in many cases, a mere transformation of the type of resources, and not growth. The replacement cost is, in some cases, higher than income generated by employment; it is not a choice based on monetary criteria, but other criteria such as independence, mid or long-term investment, preference for the type of tasks, etc.

Without a doubt, applying the criteria of progressiveness to dual-income couples is an obstacle to reconciling work and family life, with a deterrent effect on the second job.

The most important question regarding the analysis of the consequences of fiscal policies in terms of work done by both men and women is the following: Who benefits from them? What are the values benefiting from, and affected by, them? The idea that taxes on personal work must be progressive, at least to a certain extent, is widely accepted by the public opinion in European countries. Nevertheless, there is currently less consensus on the reach and beneficiaries of fiscal policies adopted, in theory, to assist married couples or children. Expressed in simple terms, it can be said that each social security or fiscal system corresponds to one of the following main types:

- a) Systems encouraging a strict division of labor between women and men, and assigning private areas to the former and public areas to the latter. These systems penalize the second salary in the family through high taxes, thus encouraging the non-working condition of the spouse through direct subsidies and generating high per capita work costs for social security.

- b) Systems encouraging a limited division of labor between women and men, promoting, via effective measures, work participation in both the public and private spheres. To do so, these systems offer more public services, instead of direct subsidies or fiscal exemptions, and penalize higher incomes resulting from a single salary more than those resulting from the addition of two salaries. They have a limited effect on per capita work costs resulting from social security.
- c) Barely structured systems that lack a coherent conception or explicit bases in terms of the distribution of work and management resources, whose agreements regarding social security or taxes are mutually contradictory.

In countries with highly developed social and fiscal policies, the government can indirectly contribute to an increase or reduction of birthrates or the type of living offered to children, the sick or the elderly in a household. Although women benefit in those cases where the fiscal system encourages the distribution of traditional obligations regarding unpaid work in the family, or when their need to generate personal income by selling their work in the labor market is reduced, measures that benefit the spouse generating less income and staying at home (usually the wife) contribute to making the spouse more of a dependant, both in the short and long-term.

We can find significant differences among European countries when it comes to the type of taxes applied to income resulting from personal work. Per capita personal income figures are less clear and illustrative than those for occupied workers. Plus, the latter vary significantly once tax and social security deductions are applied. There are also significant differences in the quantity and proportion of social security expenses paid by employers and employees. The difference in these proportions is more conceptual than methodological, because all of them are part of the actual work cost and are considered expenses by employers every time they have to negotiate salaries with employees.

### **III.3. Salary before and after taxes by family situation.**

The impact of taxes and the social protection system on the distribution of time by gender is highly complex, and the final distribution of paid and unpaid work between men and women is influenced by many other factors. However, to the extent household gross and net income can differ, we can say that the current situation encourages women's access to paid work in some countries more than others. The same can be said about fertility rates, which are the basis of the demand for unpaid child care work. Couples can only control their access to the labor market and their income to a limited extent, but they can have full control over the monetary and non-monetary use of resources within their household. They do this mainly by reducing fertility rates or, in other words, the potential number of children in the household.

The fiscal and redistribution policy is an important tool impacting the actual possibilities of getting a job, as well as the net benefits offered to workers, particularly married women, by that job. As a result of this influence, it is necessary to gain a better knowledge of the actual effects of these fiscal policies.

OECD's periodic reports on "*The tax/benefit position of employees*", confirm that the organization of social security has significant consequences on women's access to work and the type of jobs they can desire or aim for.

Where social security provides health care to the household members, salaried workers sometimes perceive social security fees paid under the second salary (at least as far as the health part is concerned) as a penalty. For this reason, in practice, it is frequent to find private negotiations on a better real salary, under the table, instead of using this type of assistance. This is one of the reasons behind the predominance of women and young people in the invisible, underground or black market.

The fiscal treatment of the family structure also has a significant influence on workers' net income, particularly in that contributed by the spouse and considered a second income in the household. In some countries the level of protection is so high that it can be perceived as discouraging spouses from getting a job. In any event, we must point out that fiscal and distributive policies in European countries are obsolete with respect to demographic changes. Virtually all exemptions and aids focus on children: however, at present, in the case of the European population of dependants, the elderly, and not children, are the ones needing care the most. And they will do even more in the future.

In general terms, it can be said that the EU countries fiscally penalize workers whose spouses have a job; or, in more politically correct terms, they have failed to adapt their legal and economic instruments to a new family model where both spouses distribute tasks within the household and in economic life. And we can also predict this penalization affecting the spouse with a job, which is also visible in other areas, such as subsidies or special opportunities for housing, education and other public services, will be eliminated in the future.

#### **IV. WELFARE AND COVERAGE SYSTEMS**

##### **IV.1. Social protection trends. Time and resources provided by governments.**

Welfare systems have grown steadily in all European countries over the course of the last decade, both in terms of constant and current prices. The increase has been higher in the case of some countries (Portugal, Spain) that had a low starting point, while other countries with the same starting level have not grown at the same pace. In Portugal, for example, the Welfare State only achieved true development after political changes in April 1974. From a social policies perspective, the transition process is still underway, and the socialist government taking over in 1995 created high expectations in the arena of social policies. The fight against social exclusion and in favor of education, health and other social themes, was key to the political agenda. As far as reforms in the Social Security System are concerned, most matters currently under discussion refer to retirement processes and the pension system.

This increase has been possible thanks to the general increase in the GDP. However, the situation is quite different in terms of relative effort. To gage the importance of social protection assistance in the European Community, we would have to remember that for most of them 20% of the GDP equals the total combined production of agriculture, mining and transportation. As far as medical expenses covered by social protection are concerned, their volume is higher than that of agriculture almost everywhere. The distinction between strictly medical care and related assistance of a social-health nature poses serious organizational problems. As a result of demographic changes, chronic diseases and disabilities are requiring a higher proportion of resources compared to strictly healing assistance.

Regardless of how determined governments are to cut medical expenditure, medical care will exert a huge pressure on the allocation of higher public funding in the near future. Welfare and medical care are both areas offering growing employment opportunities, and women have a high level of presence as workers in them. Traditional care, provided at home, is being transferred to institutions where women work as salaried workers. Nevertheless, there are new growing social movements opposing institutionalization in several countries, their main argument being the desire for more privacy (for children or the sick) and more savings (for the government).

In any event, paid work in the area of personal and social services is growing. The rate of private final consumption for health care is particularly variable.

In order to study actions related to child care, Jane Jenson and Mariette Sineau have studied the ideological transformations that have occurred in some governments since 1945, and they have highlighted the very diverse effects those transformations have on women in terms of citizenship and equality. Along with the socioeconomic evolution trends contradicting and hindering the subsistence of a providential government, as a result of the way it was conceived

after the Second World War both in France and other European countries, institutional choices made by France in the last fifteen years bring to discussion the egalitarian model of roles in the relationship between men and women. Their most recent institutional choices, precisely those related to the so-called AGEDs (child care and household subsidies) in 1986, or AFEAMA (family aid for the hiring of individuals to do household chores by mutual agreement) in 1990, were not of a social nature and led to the development of private child care systems (for well-off families) to the prejudice of a more egalitarian public system in terms of social or gender categories. Officially, France has been pushing a "*diversification of options*" policy to develop capacities specifically aimed at private child care: parents' work permits (including a growing female majority), fiscal deductions and subsidies applied to expenses generated by child care. This type of policies have a great disadvantage, to the extent they leave care activities in the hands of mothers, with everything this "*orientation*" involves in terms of professional inequality of opportunities for men and women. At the same time, the alleged policy to provide new child care centers has been certainly weak. According to the survey, the way most respondents feel in this connection reflects a significant degree of dissatisfaction. According to the French survey, 57% of the parents who expressed their preference for child care centers can not use them (Hatchuel, 1989, *Accueil de la petite enfance et activité féminine*, Paris CREDOC, CNAF's report) (Jenson, J.; Sineau, M. op. Cit. pp. 21).

The development of a Welfare State in Greece only took place after 1974 (the year of the fall of the most recent dictatorship), while in all Europe, and even on a more global scale, there were evident signs of a crisis in welfare regimes. The evolution of the Welfare State has taken place along with the post-war development. This includes high growth rates, increasing standards of living and consumption levels and a broad dissemination of these standards; a predomination of small family businesses, low capital concentration levels and a high relative weight of industrial capital; a very low proportion of salaried word; an abundance of jobs and a high number of migrants and sailors whose remittances have relieved pressure on the State by lower-income groups.

Potential crises have also been prevented thanks to the survival and reformulation of alternative structures in the field of social reproduction. Support networks based on a common place of origin, the organization of neighborhoods and predominant extended families have all provided feasible replacements of the lack of social services, along with broad margins of survival and even social mobility. But they have also contributed to developing individualized forms of social reproduction, with their concurring ideologies and practices. Welfare policies have not focused that much on the rational collective organization of security (the rational organization of welfare), but rather on the selective support of individuals and social climbing family strategies. Furthermore, the State's welfare efforts have been merely internal, that is, to select groups of officers mainly in the judicial and military sector.

The following are important points to understand the impact of welfare policies on the use of time:

- a) The predomination of monetary transfers with respect to services in the Greek welfare system has not evolved consistently with the presence of women in the labor market and its changing needs, to respond to pressure on their annual and temporary organizations of time.
- b) Considering the system is based on a formal employment relationship and benefits can only be recovered after a certain number of workdays (and payment of taxes), women, *who are excluded in many ways*, account for most of those with irregular or informal jobs. Work in the informal labor market does not confer a working person status: therefore, workers do not have aids or benefits resulting from this law.
- c) Interrupting the work life makes it very difficult to complete the minimum number of work or tax days. For this reason, it is relatively common for women who have worked a significant part of their adult life not to be able to finally get a pension.
- d) The quality and/or operative conditions of services in the system, particularly education and health, presuppose a considerable amount of care time and often money too.
- e) Welfare services downsizing and deterioration highlights the need to increase time and work by women, particularly low-income women highly dependent on the public

provision of services. High-income groups can purchase the services they need in the private sector. The abundance of migrant (illegal) workers carrying out many of these tasks has made those practices more common.

Maintaining previous consumption levels has been more difficult for larger population groups since the 1990s, with a consequent increase in welfare demands and complaints. In these emerging conditions, the degree of unmet needs has increased and demographic changes have redefined both their contents and their reach. The high percentages of older people, the large numbers of single people, particularly in cities, and the emergence of single-parent households have all led to a different perception of services and the provision of benefits by the state. At the same time, the growing number of people below the poverty line, the high figures of reported unemployment, and the even higher figures of unreported unemployment exert pressure on the welfare regime, at a time where privatizations are common place and priorities in the European Union suggest bigger cuts in the public sector.

Families that are no longer extended in the traditional sense but live in the same area or share obligations would seem to be the only reliable structure to provide support in multiple aspects: child care, care of the elderly and people with disabilities, access to jobs, and support in times of disease or unemployment. However, women in families, and not families, are the ones enduring the pressure resulting from privatization and the subsequent reduction of services, particularly in low-income households.

This is where grandmothers, wives, daughters and sisters become the functional equivalent of the Social Security provision standard.

At an income-level above the average, women can buy, and do buy, services from the expanding private sector in the same field, although, in any event, care continues to be their responsibility. From there the massive presence of women from former socialist countries and the Philippines as of 1989, a qualitatively new condition in the field of care: private babysitters from Bulgaria or Russia, caregivers for the elderly from Rumania, Albany or Russia, cleaning people from Poland or Albany, babysitters and domestic workers from the Philippines, all of whom have helped local women "save time." This new pool of informal work, of women immigrants mostly, though not exclusively, illegal, forced to work in exchange for very low salaries, has made these private solutions affordable, even for the middle/low-income sector.

## **V. WORK CONDITIONS OF EMPLOYED WORKERS.**

### **V.1. Home-based and night, full and part-time work.**

Workers in the Fordist model were homogeneous. They worked full time, had a single job and worked throughout their lifespan. Modern workers are much more heterogeneous; their work is complex, discontinuous, and part-time work is widely accepted. The Fordist model never expanded enough to include unindustrialized countries in Southern Europe, and it was not adopted by women, who had to combine different tasks in different places. In Spain, trade unions traditionally opposed part-time work, as they considered it weakened the position of workers, while the repercussion of Social Security compulsory costs made this formula unappealing to employers. Recently, however, attitudes towards part-time work have changed, and it is now considered a convenient mechanism to increase women's presence in the labor market and encourage reconciliation between employment and other activities.

The complexity of activities and discontinuity in the life span not only involve organizational, economic or legal changes. They also involve psychological changes, new identities and self-images. Why should Europeans adopt identities based on paid work when paid work throughout an average life is only reserved for a relatively small number of individuals?

The social debate around home-based work is a hot issue. It has recognized advantages in terms of saving time and transportation resources, in addition to flexibility and the possibility of doing it simultaneously with other care-related activities. But one of its



drawbacks is clearly the lack of connection and the isolation from the work environment it generates in workers, as well as the problems resulting from paid and unpaid tasks for the same worker. This isolation can affect the "work culture" that most isolated workers value very positively. As far as simultaneity of tasks is concerned, the problem does not lie in simultaneity itself, but in the possibility of this contributing to making them less visible and, therefore, more difficult to avoid (for example, making it difficult to share them with the rest of the family, with social services, etc.), as a result of the isolation of workers doing simultaneous tasks.

The proportion of home-based paid work considered as a whole is still small in Europe (around 6%). But these figures must be taken with caution; they may actually be a lot higher, since this is the type of work concealing a large part of clandestine employment. In general, trade unions consider home-based work as piecework and, therefore, workers do not have their social protection. Immigrants and women are abundant in this category. Working women in Greece or Spain, for example, are far more numerous than official statistics will show, as this is a frequent form of labor in sectors such as the textile industry, shoe manufacturing and the toy industry.

### V.2. Work and the Lifespan.

Women's position in the lifespan is not a determinant of attitudes towards male work. However, it is decisive as far as women's work is concerned. As shown by the following table, full-time work is considered the ideal situation by a vast majority, but only prior to having children or once these grow older, and only 15% believe it is the best situation if children are of preschool age.

**Table V.2.1.**  
**Women's attitudes towards work depending on their position in the lifespan\*.**

	TOTAL	MEN	WOMEN
Once they get married and prior to having children			
Full-time	77,7	69,4	73,8
Part-time	14,9	13,8	16,0
Won't work	7,3	9,4	5,3
Doesn't know	5,2	6,1	4,4
Didn't answer	0,9	1,3	0,5
Total	(2477)	(1193)	(1284)
If there is a child not old enough to go to school			
Full-time	15,8	15,9	15,6
Part-time	37,4	34,8	39,8
Won't work	39,9	41,9	38,0
Doesn't know	6,0	6,2	5,8
Didn't answer	1,0	1,1	0,9
Total	(2475)	(1191)	(1283)
Once the youngest child starts going to school			
Full-time	41,2	41,1	41,4
Part-time	38,7	35,1	42,0
Won't work	13,3	16,4	10,4
Doesn't know	5,8	6,3	5,3
Didn't answer	1,1	1,2	0,9
Total	(2474)	(1191)	(1283)
Once children have moved out			
Full-time	75,2	73,5	76,8
Part-time	10,5	9,2	11,7
Won't work	8,0	10,4	5,9
Doesn't know	5,4	6,0	4,8
Didn't answer	0,9	0,8	0,9
Total	(2473)	(1191)	(1282)

Source: C.I.S., Study No. 2233, January 1997.

\* The question was: *Now I would like you to tell me if you believe women should work outside of their homes full-time, part-time, or not work, in each of the following circumstances.*

The two following tables show an interesting fact on attitudes towards unpaid household work. They show males perceive household work as more rewarding compared to women

and, also, that their incorporation into the labor world is less necessary as a guarantee of personal independence and earning supplementary income to meet their household needs.

**Table V.2.2**  
**Evaluation of a housewife's work.**

	TOTAL	MEN	WOMEN
Being a housewife is as rewarding as working outside the home.			
Fully agrees	7.9	7.6	8.3
Agrees	32.8	34.3	31.5
Neither agrees nor disagrees	9.1	9.7	8.6
Disagrees	31.3	29.6	32.9
Completely disagrees	11.3	7.1	15.1
Doesn't know	7.4	11.5	3.5
Didn't answer	0.1	0.2	0.1
TOTAL	(2473)	(1191)	(1282)

Source: C.I.S., Study No. 2233, January 1997.

**Table V.2.3**  
**Employment as a need and guarantee of independence.**

	TOTAL	MEN	WOMEN
Women today, whether they want it or not, must have a paid job to contribute to supporting their families.			
Fully agrees	19.0	15.8	22.0
Agrees	59.1	58.1	60.0
Neither agrees nor disagrees	8.6	8.7	8.6
Disagrees	9.8	13.3	6.5
Completely disagrees	1.2	1.6	0.9
Doesn't know	2.2	2.5	1.9
Didn't answer	0.1	0.0	0.2
TOTAL	(2479)	(1195)	(1284)
It is essential to have a job outside the home for a woman to be independent			
Fully agrees	14.5	10.0	18.7
Disagrees	48.4	47.2	49.5
Neither agrees nor disagrees	8.9	9.8	8.0
Disagrees	20.6	24.1	17.3
Completely disagrees	3.9	4.5	3.3
Doesn't know	3.8	4.4	3.2
Didn't answer	0.0	0.0	0.1
TOTAL	(2481)	(1195)	(1286)

Source: C.I.S., Study No. 2233, January 1997.

In the future, telematics will increase the possibilities of growth for this form of work, where some of the most modern and convenient forms of highly-qualified labor for workers (computer-related jobs) will coexist with some of the more traditional forms of work less favorable to them.

As regards employment and unemployment, it is important to remember some of the traits of the labor market determining men and women's labor patterns, putting the importance of the formal-informal dichotomies into perspective and allowing us to better interpret the tables described by the Labour Force Survey (Vaious, 1997). The size of businesses is one of the most relevant traits of the productive structure. The broad sector of small businesses includes many different situations and forms of operation, which range from marginal and unsteady activities, to barely survive, to high-tech, flexible and dynamic companies well positioned in the market. Some small businesses are completely "formal" (they have records, abide by the law, etc.), while others operate in an informal or illegal fashion either fully or partially. Thus, not all small companies can be included in a single undifferentiated group, and not all the different types of jobs in it can be assigned to the category of low-paid jobs, bad working conditions and lack of

options. Also, there are positive aspects associated with self-employment, personal growth and high income.

In Greece, Spain and Portugal, as well as other countries in Southern Europe, economic activity is blurred into a really large number of very small companies, with less than ten employees per business.

## **VI. THE FRAGILITY OF THE BORDER BETWEEN FORMAL EMPLOYMENT, INFORMAL EMPLOYMENT AND EMPLOYMENT.**

The formal and the informal are two extremes in a continuum of work forms. The difference in the division of labor and time by gender contributes to the emergence of gender inequalities in economic terms (men have more money available), but also in political terms (men participate in agreements regarding time that contribute to their autonomy). Thus, paid work is recognizable in terms of its temporary dimensions because time is consistent with money. Household work and that in the context of families is not encoded via the exchange for money: it is difficult to separate the compulsory part from that corresponding to individual choices and preferences. The exchange of time for money is called work in socially positive terms. Unpaid work, on the contrary, has highly ambiguous connotations, and it has been only recently, through feminist thinking and campaigns, that it has begun to be regarded as work.

The massive increment of women's participation in paid work and the slow growth of male participation in unpaid work would seem to bring men and women's temporary models closer together. Nevertheless, the difference in participation in paid and unpaid work gives men a lot more opportunities compared to women. Gender inequalities and hierarchies persist in the contribution of time to the different forms of work, particularly unpaid-reproductive work (care, household maintenance, consumption, maintaining family networks, etc.). Women doing the core of unpaid work have an obligation as a result of temporalities of an uncertain social value compromising their life choices and opportunities. Their schemes (of activities) are characterized by discontinuity, diffusion and overlapping, and they can not be outlined following a normative timescale.

Both men and women must face deep transformations resulting from the reduction of employment opportunities in the European Union and changes in the organization of work times. In this regard, however, existing gender differences and inequalities set the terms of debate and negotiation. The redistribution of work time is one first example of the above that encompasses many important aspects: daily and weekly work schedules; the redistribution between employees and employers; time dedicated to reproduction work; the redistribution between men and women; time dedicated to political participation and leisure; the redistribution between the public and private spheres resulting from the role of the Welfare State, etc.

In France, where studies on underground or informal work, or the so-called clandestine employment, are barely available, its evaluation is highly difficult. Statistics are limited and unreliable and, consequently, clandestine employment can not be assessed appropriately. Clandestine employment shares several common characteristics with household work as a result to its capacity to be flexible or unsteady (in terms of social rights and salaries). Women with access to their husbands' social coverage are more prone to staying in clandestine employment than the rest. (Jense, J.; Sineau, M.).

The social and political debate around informal work can be clearly illustrated with the Greek case. Informal activities and forms of work are a significant trait of the labor market, which does not hold reported employment and unemployment as a central concern. Informal activities are not precisely illegal. The regulatory framework is complex and full of cracks, it creates openings and allows for mutual support and continuity between formal and informal activities, with tolerance by the State being the most common "*policy*" towards it.

Informal activities supporting the development of cities and regions in Greece, like in other parts of Southern Europe, are not homogeneous and are not completely consistent with images

of backwardness and marginalization. They are linked to a continuation of old forms of organizing production, but also to very dynamic forms of business and restructuring processes. Informal workers appear in all the different sectors and branches of economic activity, with incomes ranging from the lowest to the highest levels. Through these activities, individuals and companies use an inefficient and centralized bureaucracy to get favors, evade taxes and, in any event, avoid many inconvenient aspects of the system aimed at reinforcing labor legislation.

The above-mentioned patterns of activity are found in the family, the institution facilitating their proliferation and individuals' work availability. The family has preserved its productive importance in the community through a multitude of small or family businesses. It also encompasses and organizes a diversity of functions: families share incomes coming from a variety of formal and informal sources and, when they want to do so, they help their members start up businesses, go to school or get a job. Through the generalized occupation of dwellings as owners, housing is secured for all the family members, and family wealth is increased via illegal constructions and the exploitation of properties: family networks are the main mechanism to find a job and provide help in times of unemployment or study: they also provide services, or make existing services available, to young people, the sick or those with disabilities. The "protection" network, however, entails a series of conditions in exchange for assistance and services provided, particularly for women in the family, whose work and time represent a much more valuable compared to men.

Figures from surveys and statistics fail to consider the important presence of informal activities and other forms of work. The lack of quantitative data does not diminish their importance. The lifestyle and temporary conditions of many people and productive structures in many places depend on a significant array of unreported activities providing first or second jobs.

The Greek debate around informal work often starts with the government's attempts to obtain, at least on a rhetorical level, a reduction in budgetary deficits, as well as the detection of tax evasion activities. The discussion, therefore, is dominated by economists and the problem of unreported incomes and the resulting tax evasion (Pavlopoulos, 1987; Vavouras, 1990). The obviously growing signs of lack of housing, poverty and high unemployment rates, although less dramatic compared to other parts of Europe, have contributed to changing the emphasis of informal work forms and the definitions of actual work conditions (Kravaritou, 1989; Mouriki, 1991; Hadjimichalis, Vaiou, 1987; 1990).

An indirect indicator of the presence of informal activities is the small proportion of "economically active" individuals, and the even smaller proportion of "employed" individuals in the total population 15 and older (OECD, Indicators, Waldinger, Lapp, 1993). Other indicators can be found in the consumption patterns of different social groups and environments, as shown by local studies. The general data show the importance of informal activities, although there are significant variations throughout sectors, branches and places, as well as a lot of controversy around calculation methods.

In Greece, like in other places, informal activities and workers are linked to tax evasion. Their quantification often turns into a debate, which might not be the most important or interesting, at least with respect to the majority of the workers involved. Thus, different rough estimates that must be taken with caution have been produced from time to time. According to these estimates, informal activities accounted for somewhere between 18 and 30% of the GDP in the 80's (Barthelény et al., 1988). Later estimates by Eurostat (1995) show that as much as 45% of all employees work out of their homes and over weekends. Apparel and leather trade unions estimate that, by 1987, in addition to the 96,000 workers registered with the NSS, there were at least 200-250,000 informal workers in this branch of production. Women account for 62% of registered workers and over 85% of informal workers, which changes both the weight of industrial employment in total employment and the gender composition of industrial workers in these branches.

A study conducted by the Center for Economic Research and Planning (CPER, 1993) attempted a different type of estimates on the underground economy (or "para-economy", in Greek) through the use of a different type of indicators. The underground economy is estimated at 31%

of the GDP for 1992, with a higher concentration in urban centers and middle-income groups. Estimates show over 40% of the self-employed underreport their income (40% of lawyers, engineers and doctors, 46% of service providers, 48% of technicians). At least 48% of manufacturing companies, 43% of companies in the construction business and 40% in hotels and restaurants hide part of their activity, while 44.5% of the employees in the public sector have a second job after their regular work schedule.

Field work on industrial sub-contracting and informal work forms in the Great Athens (1994-96), Thessaloniki (1988-90) and other parts of northern Greece (1984-96) has revealed a significant presence of informal workers, both national and foreign, a large part of them illegal. In working-class neighborhoods in Athens and Thessaloniki, for example, it was found there was at least one informal industrial worker in 7% and 10% of households, respectively. Furthermore, the number of companies registered with the NSS is 25 times lower than the actual number identified through field work (Vaiou, Hadjimichalis, 1997).

The expansive areas of informal employment in the field of manufacturing experienced a deep crisis in the 90s. An important contribution in this regard has been the opening of borders to former socialist countries as of 1989. The significant amount of potential labor in these countries readily available to the European capital has created, both in Greece and other countries, pressures on the labor market.

As already mentioned, informal activities and other forms of work are found in all the different economic sectors and activities or employment areas. Examples include small business owners, self-employed professionals, unpaid family workers, many seasonal workers in tourist businesses, domestic assistants and babysitters, private tutors and construction workers, as well as people involved in smuggling, arms and drug trafficking, prostitution, illegal fishing, illegal construction, purchase and sale of antiques and other illegal or socially undesirable activities. A growing number of foreign immigrants, both legal and illegal, as well as the "non active" population, such as students, housewives, retirees and minors, work informally but regularly in these conditions.

Most informal workers are women. A large number of interviews and one survey after another show women start working informally in order to "meet a family need". They join the workforce in a circumstantial fashion that adapts to family responsibilities. However, needs are still present and informal work extends throughout their lifetime, obviously without being recognized as real work and with no security or other benefits resulting from paid work. From there that women working as domestic assistants, outside their homes, such as babysitters, cleaning people, etc., usually end up their work lives without being entitled to health insurance or pensions (Vaiou et al., 1991; 1996).

The high pressure on working women stems from the fact that informal work completely follows the employers' rhythms and needs to their own benefit. From there that the variation in daily work schedules, days worked per week or month, in the months where work is available, depending on the different sectors of activity, can often not be reconciled with family life schemes and rhythms. This is a very common cause of stress and anxiety for female workers. Daily work hours can be very few (cleaning entrance halls, stairs and large office buildings, three or four hours a week) but also very long; an informal industrial worker, for example, may have to work more than 12 hours a day in peak seasons.

Estimating work time among informal workers who also take work home is quite difficult due to the variability in the simultaneous tasks they perform, both in the case of paid and domestic work. In this situation, working women do not know how to calculate the time they use in their work and their own family. They can not calculate their hourly benefits either. From there their submission to statutory minimums, because the only price set is that of the piece produced. There is a constantly variable number of daily work hours due to seasonal peaks and periods of scarcity.

Family workers do not have a fixed time schedule, neither on a daily basis nor throughout their work lives, because their work is linked to the family business needs and expectations. On the

other hand, their link to the business is not only a professional relationship, but one of kinship that makes it very difficult for them to specify the terms of their work, including work schedules. Cleaning women and people taking care of children or the elderly usually have fixed work schedules, but only if they do not live with their employers' family. Otherwise, they feel they are permanently available. Teachers have steadier work schedules, although these are highly variable throughout the year because they follow the rules of school systems, with long unemployment periods.

Informal work offers men a second job option that follows a time use pattern free of care responsibilities. In these cases, they receive social security and related benefits through their first (formal) job and use the second one to increase their income. Their situation is quite different from that of women attempting to live exclusively through an informal job.

The presence of immigrants from both European and non-European countries is a current trait of European societies. The problems earlier immigrants must face are different from those faced by newcomers. Although governments in all EU countries have proposed contention policies both for immigrants seeking political asylum and those arriving for economic reasons, the trend towards mobility is increasing. The reason for this growth is the difference in fertility rates between Europe and the countries surrounding it, the difference in wealth, the lower costs of transportation, the media impact on the dissemination of an image of Europe as a prosperous region, and insecurity problems in large regions of the world. Even countries with a strong migratory tradition (Greece, Spain, Italy and Portugal) are currently receiving migratory flows much higher than those officially reported.

## VII. EMPLOYMENT EXPECTATIONS FOR EUROPE'S FUTURE.

The first thing we must mention about the future of employment is that experts are extremely cautious when it comes to its evolution. As shown in Table IX.1, European experts have predicted significant differences between upper and lower scenarios. While the difference is almost 10% in Iceland, the United Kingdom, Finland or Norway, it exceeds 20% in Belgium, Greece, Luxemburg or Ireland.

**Table VII.1**  
**The future of paid work. Active population projections for 2005**  
**Key indicators**

		(1)		(2)	(3)	(4)	(5)	(6)
		Active population trends (1990 = 100)		% total assets / population ages 15-64	Young active population trend (ages 15-24) (1990 = 100)	Workforce ages 45 and above vs. total adult workforce	% of active population in the population ages 55-64	% of women vs. total active population
		Max-min difference						
Austria	National, low	18	105	67	72	33	24	43
	National, high	18	123	74	91	34	35	45
Belgium	National, low	20	100	62	74	29	21	43
	National, medium	20	107	66	69	32	30	43
	National, high	20	120	73	108	32	35	47
Denmark	National, low	15	97	81	68	43	56	47
	National, medium	15	105	86	77	44	67	48
	National, high	15	112	90	82	44	74	48
Finland	National, low	10	98	72	83	46	45	48
	National, medium	10	104	76	100	46	52	48
	National, high	10	108	78	105	46	53	48
France	National, low	12	106	67	69	39	38	46
	National, high	12	118	74	92	41	49	48
Germany	National, low	17	96	69	67	40	38	42
	National, high	17	113	78	90	41	49	45
Greece	National, low	21	102	60	80	35	34	39
	National, high	21	123	69	110	37	45	43
Iceland	National, low		111	74	86	44	71	46

	National, high	8	119	78	98	43	73	47
Ireland	National, low		111	62	93	36	38	36
	National, high	30	141	72	119	35	50	42
Italy	National, low		99	62	55	52	19	39
	National, alto	17	116	71	71	54	30	43
Luxemburg	National, low		98	70	78	36	28	37
	National, high	28	126	82	110	37	42	41
The Netherlands	National, low		106	68	72	35	29	43
	National, medium	17	106	66	83	35	31	40
	National, high		123	76	91	37	41	45
Norway	National, low		104	76	68	42	59	46
	National, medium	11	109	79	85	44	71	46
	National, high		115	81	86	42	65	47
Portugal	National, low		104	73	64	37	45	45
	National, medium	14	113	74	72	38	44	46
	National, high		118	80	81	38	56	47
Spain	National, low		109	64	66	35	37	39
	National, high	17	126	72	80	37	48	43
Sweden	National, low		96	79	68	44	78	48
	National, medium	14	107	86	84	46	80	48
	National, high		110	84	89	43	71	48
United Kingdom	National, low		100	76	76	40	50	47
	National, medium	9	101	76	85	38	50	47
	National, high		109	82	82	41	59	48

**Source:** Duran et al., with figures from the Ministry of Labor and Social Security, "Perspectivas de Empleo, 1994". Madrid, 1994. vid. pp.: 181-185.

### VIII. DISTRIBUTION OF THE GLOBAL WORKLOAD AND RESULTING RESOURCES.

The total workload is the sum of paid and unpaid work. For some people it is not simply a workload, but a work overload, and they consider they are treated unfairly when it comes to the social distribution of obligations and privileges.

**Table VIII.1**  
**Total annual work hours for the population above 18,**  
**Including vacation seasons.**

Annual work hours (assuming there are no vacations)		Annual work hours (calculating changes produced by vacations)*			
	Hours a year	%	Change produced by vacations	Hours a year	%
Monetized work	(52,4).(14,31) = 749'84	33	33 - 14% = 28'4	644'86	28,2
Non-monetized work	(52,4).(28,47) = 1.491,83	67	67 + 10% = 73'7	1.640'30	71,8
Total workload	(52,4).(42,78) = 2.241,67	100	28,4 + 73,7 = 102'1	2.285'16	100

**Source:** Durán et al, with data from CIRES 1996, Time Use Survey.

The annual calculation of work hours was done based on 56 "regular" weeks, plus an extra 10% of non-monetized work due to extra household work on vacations, as well as the lack of institutional help during this period. 14% of paid work was deducted for the same reason.

According to a study by Clermont-Goldsmith, European countries show little homogeneity in time invested in paid activities reported by the National System of Accounts. Also, there is no homogeneity in time used in unpaid work. Our own analysis shows some countries are a lot wealthier when both types of work are considered. Italy, for example, receives almost as many dollars per capita as Denmark (which receives 1,500 dollars per capita less annually). In exchange for this loss, however, they generate 55% of their work time outside the market, while only 32% of the Danish workforce (both paid and unpaid) is outside the market. In other words, comparatively, Italians have an additional 23% of unpaid work time. That means they only lose 1,500 dollars per capita, which does not seem like a bad deal.

With regard to the total workload distribution by gender, women's global workload is generally higher. Still, Denmark and Germany are some of the European countries where, according to available sources, the opposite is the case.

Over the course of the last three decades, we have witnessed a massive entry of women into the paid labor market, where they spend a significant part of their everyday life and their lifespan. However, men have not assumed the burden of care and household obligations to the same extent, despite emerging signs of change, particularly among the youngest and those with the highest level of education. Therefore, the time of males, both in their everyday schedule and their lifespan, is not conditioned by the predictable time dedicated to voluntary and care work. Males are free (in terms of care responsibilities) to participate in the public sphere of work, politics, unionism or leisure. At a time of economic challenges and an actual decline in income, moonlighting (particularly among males) absorbs even more time outside the family. This time is considered legitimized, and generally necessary, to maintain standards of living. Still, it contributes to increasing the distance between males and household work and care responsibilities, and it also increases the need for women to invest efforts in this field.

The ideological and practical ramifications of providing for the family or doing household chores are such that even women often believe their position with respect to paid work is secondary, thus devaluing their own contribution to the family's income and well-being, and proportionally reducing their own personal growth aspirations. This is particularly the case of the lowest levels of training, qualification and income. In this context, women are more willing to accept informal jobs: they consider these jobs as temporary jobs supplementing the family income (that is, that of men in families) in periods of economic challenges. However, one survey after another shows that informal work ends up being a permanent activity for them, with no security or any other type of retirement or health benefits. Women often end up depending on their own families after having worked informally throughout their adult life.

With regard to the global workload and the distribution of economic resources by gender, evidence shows that women have a heavier workload and work more time than men, particularly where they have a paid job, as a result of the so-called "double load". In fact, most women must learn to combine paid work with the burden or weight of unpaid work. The total workload is higher by the week and even higher throughout their lifespan, because actual retirement and leisure are a commodity they barely enjoy.

According to a study by Goldsmith-Clermont and Pangossin-Aligisakis, "*Measures of unrecorded economic activities in 14 countries*", (Human Development Report 1995, New York, Oxford University Press), in Denmark the total weight of the workload for the population ages 15-64 is 7.58 hours for men (6.00 paid, 1.38 unpaid) and 7.29 hours (4.19 paid; 3.10 unpaid) for women, while in Norway it is 6.52 (4.24 paid; 2.28 unpaid) for men and 7.15 (2.44 paid; 4.31 unpaid) for women. In France, the corresponding figures are 6.28 for men (4.0 paid; 2.28 unpaid) and 7.09 (2.10 paid; 4.59 unpaid) for women.

Data available for Portugal confirm the same fact: in 1994, the total work time (paid work plus household work, plus work-related commuting) was higher for women: 61.2 hours a week, as opposed to the average 60.5 hours a week for men.

This phenomenon is particularly significant, considering most Portuguese women show a continuous pattern of activity throughout their lifespan. Eurobarometer's results for 1991, analyzed by Lopes and Perista, 1994, show there are no gaps for periods of one or more years in their professional careers. According to this study, 81.2% of all women in Portugal are continuously active, while the average figure for the EU is less than 59.7%. In Portugal the age of motherhood does not lead to significant declines in the female participation rate. This causes the curves of participation in the activity to be very similar for men and women, in all age groups.

The global workload for men and women has a disproportionate effect in terms of the distribution of economic resources by gender. Women contribute a lot more time to unpaid



activities, and this puts them at disadvantage even within the family. On the other hand, the fact that women dedicate less time to paid work has repercussions on their professional career opportunities and their occupations, status and income. A study based on the initial results of the European Commission Panel on Households (Barreiros, 1996) shows family workers and people (mostly women) who perform the role of wives or child caregivers have a high level of poverty in Portugal: 62% and 53.4%, respectively, while the average national level of poverty is 27.1%. These individuals are predominantly, or almost exclusively, women.

According to the same source, another group particularly vulnerable to poverty is that of single-parent households with children under 16. However, curiously, in Portugal this group, which is also mostly female, only has a poverty level of 17%, a relatively low figure even if compared to that of other European countries. In fact, according to national statistical sources, single-parent households are the type of family with the lowest income level: the income level in 80.8% of single-parent households is less than one half of the annual average net income (Household Budget Survey, 1989-90, in Perista et al, 1997).

## **IX. THE MADRID SCALE. DEMOGRAPHIC PROJECTIONS FOR 2010, 2025 AND 2050. CHANGES IN THE DEMAND FOR UNPAID WORK.**

### **IX.1. The age components of demand.**

There are four major sources that generate the demand for unpaid work, particularly care work, and depend on the population groups where that demand originates: 1) the demand created by children 2) the demand created by the sick 3) the demand created by the elderly 4) the demand created by those overworked in paid activities.

Although specific data on time demands for each country are too fragmented to be used as a basis for international comparison, there is a scale, known as the Madrid scale or index, that can be easily applied to calculate the general demand for care work in each country at a given moment. Just like the Oxford scale is used to calculate the impact of the household composition by age on the availability of monetary resources, the Madrid index attempts to calculate the impact of the need for care. The Madrid index assumes adults ages 18 through 64 living in the household require a care unit per person, children ages 0-4 require 2, those 5-14 require 1.5, children 15-17 require 1.2, people ages 65-74 require 1.2, the elderly (75-84) require 1.7, and very old people (those above 85) require two units per capita. Even though the Madrid scale was designed to analyze households, it can also be used to measure and project the total demand for care for all the population in a given country. Once more detailed data on unpaid work are available, it will be possible to refine this scale and adapt it to more specific demand conditions.

An estimate of the total care demand in each country is possible if age groups are weighed based on their specific capacity to generate such demand. The total of care units currently needed in Europe is 19% higher than the total population, but it does not have a homogeneous distribution, and neither children nor the elderly can be self-sufficient. Of course, this is a very general estimate that can be refined with more accurate indices depending on the health conditions of the elderly in each country. Still, it provides a good overview of the current situation and the origin of Europe's care demand by age. In Germany, for example, the total demand for care units is only 9% higher than the total population, while in Sweden it is 21%.

**Table IX.1.1**  
**Care work in Europe (Madrid scale) in 1995. Demand by demographic origin. Distribution by age.**  
**Thousands.**

	Madrid scale	EUR 15	B	DK	D	GR	E	F	IRL	I	L	NL	A	P	FIN	S	UK
Preschool (0-4)	2	42170	1230	670	838	1038	3870	7252	518	5539	54	1977	945	1115	655	1211	7713
Schoolchildren (5-14)	1.5	66507	1818	849	13656	1899	5609	11640	940	8776	71	2774	1415	1839	976	1585	11266
Young students (15-17)	1.2	16916	441	236	3065	553	2293	2271	236	2601	13	664	330	581	236	369	2474
Adults (18-64)	1	234932	6340	3319	53148	6592	24742	35680	1726	37029	262	9999	5138	5228	3210	5306	35869
Old (65-74)	1.2	40299	1169	523	8908	1162	4233	6181	286	6848	40	1411	866	1069	513	981	6207
Older (75-84)	1.7	29682	781	467	6375	829	3149	4172	235	4738	29	1112	623	751	388	931	5104
Very old (85 and above)	2	12030	325	176	2737	298	1074	2156	69	1816	11	406	246	197	64	350	2039
<b>Total care units demanded</b>		442536	12104	6240	88727	12371	44970	69352	4010	67347	480	18343	9563	10780	6042	10733	70672
<b>Total Population</b>		371563	10131	5216	81539	10443	39177	58020	3580	57269	407	15424	8040	9912	5098	8816	58491
<b>% of care units demanded vs. total population</b>		119%	119%	119%	109%	118%	115%	119%	112%	117%	118%	119%	119%	109%	118%	121%	120%
<b>% of care units demanded vs. population ages 18-64</b>		188%	191%	188%	167%	188%	182%	194%	232%	182%	183%	183%	186%	207%	188%	202%	197%

Source: Duran et al. with data from Eurostat. Statistiques Démographiques, 1996.

## IX.2. The role of the sandwich generation.

Care demands can be met or not. Meeting the care demand is a task that can be attributed to unpaid workers (relatives or volunteers) or paid workers (public services or private businesses), a choice of the utmost political and economic importance in all countries, as this affects the population and the distribution of the Public Administration and Social Security budgets. It is particularly important to the population traditionally responsible for caring for their relatives: in other words, to women.

Eurostat's statisticians work with three different types of future scenarios, and we have also considered these three thresholds: years 2010, 2020 and 2050. The reliability of these data declines in the long run. The three scenarios are high, low and baseline. The latter is that developed by the National Statistics Institutes and it is considered the one most likely to occur. Still, the other two indicate the maximum and minimum limits of what demographers consider possible.

In terms of projections, we must highlight that, as opposed to birthrates (except in case of war) which are highly steady and can be known in advance fairly well, birth is less predictable due to its voluntary nature, and it can change fairly quickly in some regions or countries. Therefore, estimates on the elderly population are highly reliable compared to estimates on children and the population of young people. In recent years, birth and fertility projections for southern European countries have been higher than actual births.

There are currently few data available on unpaid work for all European countries or all the countries in the European Union. The distribution of care demand based on the Madrid scale is quite different among European countries. In the average Europe, 54% of the demand comes

from the adult population, which can pay for care with their own financial resources and resort to self-care. However, of the total demand for care, 24% corresponds to children and 22% to old people. This distinction is important, because child care is usually provided by young adults. There is a close gender-based relationship between demanders and their mothers, particularly in the case of very young children (8% of the total demand). But the demand for unpaid care by the elderly population is usually met by their children, that is, the next generation. The generation of very old people is also old; they are close to, or beyond, the age of retirement and often lack both the physical and financial resources required to provide that help. On the other hand, there are no natural gender relations between the elderly population and their children, whether male or female, although the tradition has made this relationship part of the mystique of femininity.

### **IX.3. Quantity and quality of care. Future aspirations and demands.**

The projections on care demand we will use here are based on the hypothesis that the quantity and quality of care services demanded for each person will maintain the levels they had in 1995. However, all the different studies conducted on children, adults and the elderly agree on the fact that the quantity and quality of care increase constantly as the standard of living and the population's expectations on education, health, leisure and independence increase. Just like the consumption of goods, which is relatively stable, the consumption of services is extraordinarily resilient, and the European economy is already one based on the service sector and not the production of goods in industry and agriculture.

If the demand for care work of a merely demographic origin is compared to the demand generated by the growth of quantity and quality expectations, the figures we have been using can double very easily. At present, assuming there is an even distribution in care provision, each adult must provide two care units: one for himself/herself and another for somebody else. In some countries the demand is lower (Spain, 1.52, or Greece, 1.58). The projected care demand by different age groups has been estimated for years 2010, 2020 and 2050 according to Eurostat's low scenario. By 2010 five countries will exceed the limit of two care units by adult person (Austria, Portugal, Finland, Sweden and the United Kingdom).

By 2010 five European countries are expected to have more than 25% of their total care demand coming from the elderly population. The Madrid index may be too optimistic in terms of the actual demand to be generated by the elderly, because it was developed for a population mostly living in large homes, along with younger relatives. This scenario, on the other hand, can not be applied to the wealthiest countries in Europe, where families do not share dwellings, and where, to a large extent, the elderly are used to living alone in their own house. By 2050, according to Eurostat's low scenario projections, in Europe as a whole the population ages 18-64 will have to produce 2.17 care units per capita, and by then all European countries will have surpassed the care demand limit of two units per person. According to this low projection, that means that, in half a century, attitudes and production management in the market will have to be transformed to match the new demand for care jobs. This demand will not be met by demanders themselves at the current prices in the labor market (considering they will be children or pensioners) in 54% of the cases. At present, the demand generated by the elderly only accounts for 19% of the current total demand. According to predictions for 2050, and still with the same low scenario, this demand will account for 34% of the total demand then. This will have a very significant effect, particularly for countries having experienced a recent demographic transition and providing few assistance services to the elderly until now. 44% of the demand will come from the elderly. In Ireland, 40% in Spain, 36% in Italy, and 35% in Greece and Austria.

The three projections for the baseline, low and high scenarios follow the same general trend of structural change: fewer children, fewer adults and more elderly people.

**Table IX.3.1**  
**Care work in Europe (Madrid Scale). Projections for 2010, 2020 and 2050.**  
**Demand by demographic origin. Low, baseline and high scenario.**  
**Distribution by age.**

	Low scenario			Baseline scenario			High scenario		
	Eur 10	Eur 20	Eur 50	Eur 10	Eur 20	Eur 50	Eur 10	Eur 20	Eur 50
Preschool (0-4)	7.7%	7.2%	6.3%	8.6%	8.1%	7.3%	9.8%	8.9%	8.6%
Schoolchildren (5-14)	12.9%	11.6%	10.3%	13.7%	12.8%	11.5%	14.7%	14.1%	13.3%
Young students (15-17)	3.5%	3.1%	2.7%	3.4%	3.3%	2.9%	3.2%	3.5%	3.2%
Students (0-17) Subtotal 1	24.1%	21.9%	19.3%	25.7%	24.2%	21.7%	27.7%	26.5%	25.1%
Adults (18-64) Subtotal 2	53.9%	53.1%	46.1%	52.2%	50.9%	44.0%	50.3%	48.5%	42.8%
Old(65-74)	9.7%	11.3%	12.6%	9.5%	10.9%	11.5%	9.2%	10.3%	10.0%
Older (75-84)	8.8%	9.6%	14.9%	8.9%	9.8%	14.5%	8.8%	9.7%	13.5%
Very old(85 and above)	3.2%	3.8%	6.7%	3.4%	4.4%	7.9%	3.6%	4.7%	8.3%
Elderly (65 and above) Subtotal 3	21.7%	24.7%	34.2%	21.8%	25.1%	33.9%	21.6%	24.7%	31.8%
Total care units demanded	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Durán et. al. with data from Eurostat. Statistiques Démographiques 1996.

**Table IX.3.2**  
**Projections for 2010, 2020 and 2050.**  
**Evolution of care demand in Europe**  
**by age of demanding population (1995=100)**

	Eur 1995	Baseline scenario		
		Eur 10	Eur 20	Eur 50
Preschool (0-4)	100.0%	94.5%	89.0%	79.5%
Schoolchildren (5-14)	100.0%	95.4%	89.8%	79.9%
Young students (15-17)	100.0%	93.1%	91.6%	79.9%
Adults (18-64)	100.0%	102.6%	100.9%	86.1%
Old (65-74)	100.0%	108.9%	125.9%	131.9%
Older (75-84)	100.0%	138.4%	154.3%	225.8%
Very old(85 and above)	100.0%	133.6%	168.3%	297.4%

Source: Durán et. al. 1998. Data from Eurostat. Statistiques Demographiques 1996.

The demand per capita is very likely to increase, as seen in recent years. Education, leisure and care services will grow significantly and will be provided by relatives, public agencies and private companies, and the same will apply to the elderly. A significant proportion of services aimed at providing company, independence, health care (prevention, rehabilitation, etc.) and social and cultural activities, as well as leisure activities, which only a minority can afford so far, will be demanded by the majority. One example is the case studied by Portugal's Bureau for the Family (1988), which estimated that, at the time, 2% of the elderly population received support from institutions and considered a desirable objective would be an increase of up to 4%. If the number of elderly people remained stable, this would mean a 100% increase in the number of services provided for this population. But according to the baseline scenario estimate for Portugal, by 2010 the number of care units required by the elderly will increase by 20% compared to 1995. In order to achieve the objective set by the Bureau for the Family, increasing the number of services provided to the elderly population by 100% will not be enough; it will be necessary to do it by 140%, and the same will apply to the corresponding budgetary increase.

We can predict that, by 2050, if current quality standards are maintained, the number of child care units will decline by 20%, and that for adult care by 14%. However, the volume of the demand by the population ages 65-74 will increase by 32%, that by the older population (75-84) will increase by 126%, and that by the very old age population (above 84) will experience a dramatic increase of up to 197%. These figures are likely to be higher, as standards for the elderly population and their care and support aspirations (health, nourishment, cleaning, leisure, independence, etc.) will continue to increase.

Social problems result from the different capacities in different age groups to pay for their own needs. Adults in good health will not have trouble finding paid or unpaid care. Most children will not face that problem either, because they have strong relationships with their parents. Most European children have been "chosen", and their parents have strong feelings of support towards them, as well as projection and common social recognition. The weakest link is that between the elderly and the very old. The demand for care by the elderly is really exhaustive, and the next generation also demand care for themselves. They are not rich and they do not enjoy good health. And since the number of children has declined, it will be more and more frequent for these old people not to have offspring. In many cases the potential caregiver is not the child, but the spouse, with divorces having significantly diminished or dissolved links between former spouses and their in-laws.

#### **X. ASPIRATIONS FOR THE FUTURE. THE ROLE PLAYED BY SOCIAL MOVEMENTS.**

The possibility of having a job in the future, or the desire to have one, is as important as actually having a job. For cultural reasons, male projects and aspirations regarding access to the labor market are highly consistent with their actual behavior. However, women's access to the labor market entails more difficulties and, consequently, fears, projects and expectations play a more important role in their professional and personal life, as well as in their political history as citizens.

According to the 1994 European Panel on Households, the difference of opinion between working women and those occupied at home was quite clear on a community level. 7% of the women working at least 30 hours stated they were unhappy, compared to 16% among housewives. In certain European countries housewives are two times unhappier compared to working women.

According to the above-mentioned MORI European Survey, a significant part of women currently unemployed still want to join the labor market in the near future: within one year (21%) or a little later (22%). Many of these unemployed women feel as if they were paid workers. Political measures of a social and economic nature should include these rather obvious aspirations. According to the study, of all European women without a job, only 45% (that is, the group ages 18-65) discard the idea of getting a job in the future. In Germany this proportion is only 27%, while in other countries like Spain it is 54%. Regardless of the different rates in each country, this aspiration can not grow and be met unless work or employment policies are reorganized and specific structures allowing the redistribution of the unpaid total workload are created.

In order to achieve the social changes desired by the population, organized political actions are required. But political actions in the traditional sense of the word generate very little enthusiasm in the European population. By way of example, the following table shows the feelings expressed by the Spanish population (men and women) with respect to politics. Distrust is the most common feeling, and enthusiasm is the less frequent one; interest is the second most common feeling among males (as stated by 30.5%), and boredom the most common one among females (as stated by 32.7%).

There is no doubt the politics of institutions (political parties, government, local representation, etc.) as we know it today has little to do with the everyday life of women and their expectations of change, and their lack of interest corresponds with the lack of interest of political representatives in matters that are vital to them.

**Table X.1**  
**Feelings generated by politics in men and women\***

TOTAL		MEN		WOMEN	
1.- Distrust	(38,8)	1.- Distrust	(39,0)	1.- Distrust	(38,6)
2.- Boredom	(28,4)	2.- Interest	(30,5)	2.- Boredom	(32,7)
3.- Interest	(26,5)	3.- Indifference	(24,0)	3.- Indifference	(28,0)
4.- Indifference	(26,0)	4.- Boredom	(23,7)	4.- Interest	(22,7)
5.- Exasperation	(20,9)	5.- Exasperation	(20,4)	5.- Exasperation	(21,3)
6.- Commitment	(9,3)	6.- Commitment	(10,5)	6.- Commitment	(8,2)
7.- Enthusiasm	(4,6)	7.- Enthusiasm	(5,7)	7.- Enthusiasm	(3,6)
Total: (2 possible answers)	154.5	Total: (2 possible answers)	153.8	Total: (2 possible answers)	155.1
Σ positive (interest, commitment, enthusiasm)	40.4	Σ positive (interest, commitment, enthusiasm)	46,7	Σ positive (interest, commitment, enthusiasm)	34,5
Σ negative (distrust, boredom, exasperation and indifference)	114.1	Σ negative (distrust, boredom, exasperation and indifference)	107.1	Σ negative (distrust, boredom, exasperation and indifference)	110,6

**Source:** C.I.S., Study No. 2208, February-March, 1996.

The question was: *Which of the two feelings I will mention do you have with respect to politics?*

Leading the European society towards changes desired by its citizens is no easy task. But we should not forget that, as pointed out by the survey, something widely spread among European citizens is the idea that political, economic and social structures are not neutral. 46% of women and 49% of males believe there are no advantages or disadvantages in being a man or a woman. A small minority (5% of women, 9% of males) believe being a woman has more advantages than being a man. A significant proportion of Europeans, on the other hand, affirm being a man has more advantages than being a woman (as stated by 44% of women and 37% of men). Equality between men and women, which was so profusely quoted in the foundation documents of the current Europe and the European Union, is still a distant objective we must struggle to achieve.

The legal framework can only be fully applied in the sphere of some formal activities. It is particularly applicable in the sphere of the public sector or that of large companies, although its relevance is highly limited in small companies, among family workers, the self-employed, informal activities, those working out of their homes and illegal immigrants, which account for a significant proportion of the actual number of workers in Europe. Women are much more affected by the lack of work regulations compared to men, regardless of how strongly modern Constitutions or Civil Codes proclaim the principle of non-discrimination, like those in Greece, Portugal or Spain, or those from other nations with an older democratic Constitution.

The process to build equality demands a contribution by social movements (women's associations, trade unions, human rights movements, employers, the media) and an intense effort by governments, political institutions, evaluation committees and courts of justice.

These difficulties demand joint and imaginative actions giving way to new forms of production management in Europe, as well as new forms of access to employment and the redistribution of the total paid and unpaid work load allowing European citizens to maintain their current level of well-being.

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## **PRODUCTIVE/REPRODUCTIVE WORK, POVERTY AND RECONCILIATION POLICIES IN LATIN AMERICA: CONCEPTUAL AND PRACTICAL CONSIDERATIONS<sup>6</sup>**

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### **1. Introduction**

A lot has happened since, in the 1970s, the feminist analysis started paying attention to the importance of distinguishing between productive and reproductive work with the aim of analyzing and finding solutions to issues raised by feminism. The main purpose of this distinction was to highlight the invisibility of women's work and its concentration in the reproductive and unpaid sphere. Another objective was that of underlining the effects of this concentration on the conditions in which women lived their work life, and also on the possibilities and expectations they faced in their lifespan. Finally, it was important to compare all this against men's concentration in the sphere of market production and its consequences on gender relations. One of the main tasks was the definition of the concepts of "production", "reproduction" and "work". Something particularly important was understanding the different aspects contributing to social reproduction, including household work and household-related tasks, which have traditionally accounted for women's bulk of work.<sup>7</sup> On the other hand, the debate around domestic work that took place particularly in Anglo-Saxon countries in the mid 70s was interesting in terms of highlighting its importance, not only in maintaining and reproducing the workforce and families, but also in the functioning of the economic system.<sup>8</sup> A large part of these analytic studies derived from conceptualizations of Marxist origin, although they have been used by authors with different theoretical approaches throughout the years.

Starting in the 1980s, the effort to increase the visibility of women's work laid emphasis on the problems of assessing it from a statistical point of view. It became evident that official statistics excluded unpaid reproductive work from both national income accounts and statistics on the active population. Historically, since data collection started in different countries, the objective of this series was, and still is to a large extent, to collect data on economic growth and production, that is, on the goods and services produced and exchanged at a price in the market. The large group of reproductive and unpaid activities not directly associated to the market was excluded from statistical information. This led to a great degree of ignorance about a large part of the economic activity mostly done by women. But after more than two decades of criticizing this situation, we can say multiple efforts have been made to counter these deficiencies by a wide variety of stakeholders, including institutions such as the United Nations and national governments, as well as academicians and research and activist centers. There is no doubt feminism has played a really important role on all these levels and has been the driving force behind these initiatives.<sup>9</sup>

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<sup>6</sup> Lecture delivered at the Conference on "Gender, reconciliation policies between the productive and reproductive spheres and public budget: Situation and perspectives in Latin America and the Caribbean," Mexico City, October 24-26, 2005.

<sup>7</sup> For further information on early contributions, see, for example, Beneria (1979) and Young, Wolkowitz and McCullagh, comps. (1981).

<sup>8</sup> A summary of the debate can be found in Himmelweit and Mohun (1987)

<sup>9</sup> Literature on the topic is vast. As an illustration, see UNDP 1995; Floro 1995; Beneria 1999; Carrasco et al 2004, and Aguirre et al 2005. As far as actions are concerned, we must mention the significant internal effort made by the United Nations to encourage the accounting of reproductive and unpaid work, from the use of the platforms of their international conferences such as Beijing and Nairobi, to the work done in their divisions such as the Statistics Office, INSTRAW and UNIFEM.

This assessment effort has also been accompanied by a higher level of theoretical and methodological sophistication on the subject, mostly in the feminist analysis (Picchio 2003; Beneria 2005a). Even though a lot remains to be done, several government and international institutions have sponsored surveys and statistical series that have allowed a more reliable approach to unpaid reproductive work. The result has been a large increase in quantitative data allowing for a more accurate evaluation of the contributions of unpaid and reproductive work. Some countries such as Canada and the United States have started collecting statistical series on time use by men and women, with details not only on the number of hours worked, but the total use of time, including leisure and transportation. Virtually all countries have estimates based on specific surveys and studies that, despite not being developed periodically, have shed a lot of light on the assessment of total paid and unpaid work by men and women<sup>10</sup>. Information on time use allows for a more rigorous and detailed analysis of gender inequalities compared to previous estimates, with significant implications for reconciliation and development policies.<sup>11</sup>

These conceptual, methodological and empirical achievements have become even more necessary with the predominant trends in labor markets, because they highlight the need to have systematic data on productive/reproductive and paid/unpaid work. These transformations include: a) the growing participation of women in paid work, which reinforces the importance of learning about the distribution of the different types of work, as well as leisure, inside and outside the home; b) both in rich and poor countries, individuals unemployed and marginalized from the core of economic life must adopt survival strategies including a higher level of dependence on non-monetized work or work not included in official statistics; c) economic crises, unemployment and underemployment, the flexibilization of the labor market and computerization lead to cyclic or occasional changes maintaining a fluid connection between activities inside and outside the market; and d) as the modern family evolves due to demographic and economic transformations, new coordinates emerge to understand the productive/reproductive work equation. All these factors explain the need to understand and measure unpaid work, and also to design policies addressing unequal distribution between men and women in order to build gender equality.

## **2. Productive/reproductive and paid/unpaid work**

As conceptual, methodological and empirical achievements have been made, the initial distinction between productive and reproductive work has often been replaced by a similar distinction between paid and unpaid work. Although maintaining the initial distinction is also important, the central nature of the distinction between paid and unpaid work is the result of several conceptual and practical reasons:

- First, as an economy becomes commercial and family income increases, a growing part of reproductive work becomes paid work. Several reproductive tasks are transferred from the domestic sphere to the market, which is the case of child care centers, laundromats or the sale of food in the streets or restaurants. Although the bulk of workers in many of these services is still represented by women, in this case their work is paid and statistically visible, at least to the extent they are part of the formal sector. However, they still represent “reproductive” work to the extent they contribute to maintaining social reproduction and the workforce.
- Second, a lot has been written about the fact that unpaid reproductive work includes an element of care and an emotional relationship between individuals that has no parallel in the market sphere. It is difficult to establish a categorical differentiation between these tasks, but the distinction between paid and unpaid work facilitates the analysis because it is less ambiguous. On the other hand, we often highlight the fact that “production” and “work” exist in the household economy, although we

<sup>10</sup> For an example of recent studies in Spain and Uruguay, see Aguirre et al, 2005.

<sup>11</sup> See, for example, Carrasco, Mayordomo and Alabart, 2004.

refer to reproductive work, precisely to counter the orthodox version defining these concepts with respect to the market.

- Third, household work is not only reproductive, because it has a non-reproductive component to it, which is the case of childless families, where the workforce is “maintained” but there is no “reproduction”, even though it is unpaid in both cases. The same can be said of care for the elderly within the household.
- Fourth, there is unpaid “production”, such as that of voluntary work, which contributes to activities linked to the market economy. Given the extension of voluntary work in many countries, it must be included as part of unpaid work, even if it is not reproductive, with the same objective of analyzing the use of time and understanding gender differences.
- Fifth, in those cases where simultaneous activities are carried out, it is often difficult to clearly distinguish or separate productive and reproductive work. This is the case of a mother selling food that uses part of the food she cooks for family consumption. In this situation, the distinction between paid and unpaid work provides additional information simplifying the analysis.
- Finally, even though women account for the highest concentration in the sphere of unpaid work, many countries have experienced an increase in the number of men doing this type of household-related activities. As countries develop and salaries increase, the tasks for which many families traditionally employ third persons become more costly. Consequently, there is an increase in tasks typically performed by men such as those in the fields of construction, carpentry, electricity and mechanics. From this perspective, it is also important to have information on this type of unpaid work, even if it is not reproductive.

All the above does not mean the distinction between production and reproduction has lost importance. On the contrary, maintaining it is essential, particularly because, from a conceptual standpoint, it connects us to the nature and the role of social reproduction in the economic system and helps us design reconciliation policies. In any event, the objective is to highlight two facts traditional economy had ignored. One is the importance of unpaid reproductive work for social and family well-being. In this regard, quantitative data allowing us to measure work and even estimate its value have highlighted the contributions of reproductive and unpaid work. They have also highlighted the many aspects making it up, with the corresponding implications for a wide array of policies. The second objective has been an increased understanding of the reproductive sphere, which has enriched the economic analysis. The feminist economy, for example, has been very explicit in highlighting how much the orthodox economic analysis ignored, or at least failed to consider. Thus, we inherited poor theoretical models exclusively based on economic rationality: feminism has highlighted the importance of the economy of care, which is less based on these assumptions, for the functioning of societies (Ferber and Nelson 1993; Folbre 1994; Benería 2005). All this has led to rethinking many aspects of the economic analysis and has represented a contribution that has changed our vision of its fundamental themes. It has also expanded what we consider to be the field of the economic.<sup>12</sup>

It is interesting to point out that this reconceptualization process is leading to a conception of the economy that is closer to that the Greek used to have, one that focused on the domestic sphere, as highlighted by some textbooks, to confront this vision to the orthodox “modern” definition. The expanded conception of the economic also leads to an understanding of the individual and social well-being, where unpaid work is a key topic. Antonella Picchio (2003), for example, has defined well-being as:

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<sup>12</sup> There is no doubt that differences exist between work aimed at the market and household work, since the former is done under the competence of exchange, while the latter is subjected to other rules having to do, for example, with care, affectivity, the socially-assigned family responsibility, etc. However, this does not mean they can not be compared, although some economists oppose this expansion of the economic sphere. There is plenty of literature on the subject; a summary can be found in Benería 2005, Cap. 5.

“a social reproduction process that requires material goods and services and paid personal services (provided by the state or the market), as well as unpaid work (in the household or the community). This process takes place in an institutional context that includes families, state bodies, companies, markets and communities” (p. 2).

This definition of social well-being means an analysis of the standard of living of a country or a community should not only include the goods and services produced in the market, but also a clear conceptualization of the contribution made by the sphere of unpaid work. It also means, as stated by Picchio and other authors, that unpaid work must be fully incorporated into the macroeconomic context and the labor market. This is the context where, for example, projects on budgets, as well as time use surveys, have been developed from a gender perspective; and it is also in this framework that social and economic policy must be inserted, including public policies and those to reconcile the different types of work.

### 3. Reconciliation policies

One of the positive effects of a better conceptualization and accounting of reproductive and unpaid work is the fact that they facilitate its reconciliation with the use of time in the labor market. In fact, there is an ongoing debate around reconciliation policies in the EU countries, maybe because the objective of combining paid and household work has become an urgent issue for women, but also for many families. Legislation in this regard has been introduced. Although this legislation needs to be improved, it has represented a step forward and has introduced the subject in the political discourse.<sup>13</sup> In any event, it is rather obvious that, as women's participation in the labor market increases and domestic service becomes more expensive, the importance of these policies also increases in any country or region. The idea is to facilitate reconciliation between household and family work and the different paid activities, and this involves different lines of action, such as, for example: a) the flexibilization of work schedules, both in companies where people work and other institutions having an effect on everyday life (schools, commercial establishments, places of leisure, banking and financial institutions, transportation, etc.); b) assistance to schools and recreation centers so they can expand programs helping families reconcile the use of time (the possibility of having lunch at schools, the design of activities to extend the school day, etc.); c) opening of child care centers where they do not exist and an increase in the number of spots available to meet the growing demand; and d) programs encouraging a more active participation of males in household responsibilities, such as paternity leaves when children are born; e) different types of assistance to families for elderly and child care; and f) other programs that can be specific to cities and regions.

The design of these policies in Latin America may seem less urgent compared to wealthier countries, because resorting to domestic service is easier. However, as it becomes less affordable to a larger proportion of the population, the trend is very likely to be very similar to that currently experienced by other countries with higher labor costs. On the other hand, as maintained below, female out-migration is changing the coordinates of family organization and reproductive work.

### 3. Human development: the capability approach and reconciliation policies

A socioeconomic vision integrating productive and reproductive work or paid and unpaid work requires an effort that is highly compatible with the human development approach introduced by UNDP in their first 1990 *Human Development Report*. Ever since then, the wide dissemination of this approach has followed different directions, one of which has been the feminist analysis. Initially formulated by Amartya Sen, and more specifically known as the capability approach, its clear relevance to the conceptualization of gender inequalities has given way to prolific literature with implications for economic and social policy (Sen, 1999; UNDP 1990 and 1995). Let us remember the general guidelines of this approach.

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<sup>13</sup> The Spanish Reconciliation Law, for example, was approved in 1999.

Sen's point of departure was the idea that development should be interpreted and measured not only in economic terms, such as the growth of the GDP and the per capita income, but in terms of its capacity to transform individuals' development horizons. Even though this idea is not new,<sup>14</sup> Sen gave it a very solid conceptual and theoretical basis built upon his criticism of modern orthodox economic theory –including the theory on well-being – and its lack of connection between economics and ethics. UNDP, on the other hand, gave it an institutional basis that has allowed its dissemination, particularly through their international, regional and national annual reports. Sen actually worked with UNDP to launch the concept of human development and give it a practical application, with a debate around its different aspects that is still going on.<sup>15</sup> Other authors have also contributed to this approach.<sup>16</sup>

For Sen, a key aspect is the development of the capabilities to be and do in every individual. This is a multidimensional process involving many factors that affect the “being” and “doing”, from access to resources to the level of education, as well as psychological factors such as self-esteem and expectations of the future. Although the GDP can be important in this process, it is well known it is not a safe indicator, particularly because that figure does not say anything about the inequality of its distribution, but also due to other reasons, such as the fact that there is not a direct correlation between the GDP and, for example, the level of education or health in many countries (World Bank 2000/2001). There are two important aspects to Sen's notion of “capabilities”. One of them refers to the functioning of individuals (the “doing”), that is, how they handle their lives and the options available for them to do so; for example, how they manage to live their everyday lives. The other aspect is the possibility of seeking broader objectives, expanding horizons –both individual and collective–, and defining and living their own lives the way they want it (the “being” or, we might add, the “becoming”). The relevance of this perspective becomes evident if we think of the really narrow horizons for a really poor girl or a peasant somewhere in the world; their expectations are so limited that it might be difficult for them to envision a different life. In this regard, Sen's perspective is marked by a very positive statement; the idea is not only to eliminate poverty, but to seek “positive freedom”, that allowing individuals to do and build, to dream and achieve what they dream of, that is, to empower human development.<sup>17</sup>

Sen and American philosopher Martha Nussbaum (2003) have pointed out that the capability approach is very similar to that of human rights. However, according to Nussbaum, human rights are more abstract and “universal”, while capabilities are more concrete, individualized and specific with regard to different contexts and needs; this is the reason why Nussbaum prefers this approach, as it is highly useful in developing a gender justice theory and applying it to the specific case of women in their social and cultural environment, in addition to the fact that capabilities have a very direct relevance to human development. Plus, she adds, the capability approach does not have the western problem of bias often attributed to the human rights approach. Still, we must admit the two approaches have a lot in common, and also that the human rights language has been developed, and has often been used successfully, by the feminist movement starting in the 1980s, particularly with regard to women's political and civil rights.

Nussbaum has criticized Sen for not being specific enough when it comes to defining capabilities, not even those considered basic. This has led to a list of ten “basic human capabilities” to “live life with dignity,” defined as general objectives that can be crystallized in each specific society. The list includes objectives such as “being able to live a life with normal longevity, that is, without dying prematurely or without the individual being reduced to a condition such that he/she does not deserve to live it”, or “being able to get an idea of

<sup>14</sup> The criticism of economicist approaches to development has been relatively frequent in many circles, and also by a variety of authors concerned about development. They were part of the “basic needs approach” developed by ILO in the 1970s and used by other institutions, such as some divisions of the World Bank. However, it did not have the dissemination or influence the human development approach had throughout the years.

<sup>15</sup> Some of the human development indices, for example, have been considered incomplete and inadequate to identify key aspects, and are currently being reconsidered to enhance them.

<sup>16</sup> UNDP's *Human Development Report*, published every year, always includes extensive bibliography.

<sup>17</sup> Note that this concept is very different from that of “negative freedom”, that refers to the absence of obstacles emphasized by orthodox economic theory, which is the case of the free market or free enterprise.

what is good, as well as being able to reflect on the planning of our own lives.” However, a reading of this list shows it still seems too general to shed light on the discussion of policies to reconcile productive and reproductive work.

Nussbaum is not the only one interested in crystallizing the capabilities of Sen’s approach. One of the authors who has worked on this subject, Belgian economist Ingrid Robeyns (2003), also put up a list to facilitate the analysis of gender inequality in the specific case of post-industrial western societies. Robeyns came up with a list of fourteen capabilities after following several steps, which included asking different persons and groups what their priorities would be considering the different capabilities. She then compared the final list to others and discussed it with other people interested. This methodology allowed her to achieve a level of specification that reflected the needs and the vision of a post-industrial society, an effort that can be repeated in other contexts. Her fourteen capabilities include those mentioned below and can provide a context more concrete than Nussbaum’s, not only to analyze gender inequalities, but also to design reconciliation policies:

- “to be able to care for children and other people,” in reference to the capability that has been traditionally concentrated in women. Robeyns is aware of the fact that this capability can have ambiguous results in terms of the effect created on the well-being of the person providing care.
- “being able to work in the [paid] labor market or carry out projects, including artistic ones,” in reference to the possibility of performing these functions in equal conditions with men, even when reality is quite different.
- “being able to move,” for example, between different spaces and places, both public and private, without restrictions discriminating on the basis of gender.
- “being able to enjoy leisure time,” in response to many statistics that show that men in many societies have more leisure time than women.
- “being able to be autonomous in terms of using time.” This capability depends on the division of labor in the sense that one type of work can provide more autonomy over one’s own time than others. It is rather obvious that household tasks, and particularly child care, tend to cause a significant reduction in the autonomy of individuals carrying them out, mostly that of women.

My argument here is that the different aspects of these capabilities can help analyze the gender difference and provide a conceptual framework to design public policies, including reconciliation ones. In the case of Robeyns’ analysis, we can add the fact that reconciliation must occur in several directions that have to do with: a) different types of paid and unpaid work; b) work and leisure; c) work, leisure and mobility; d) jobs allowing different types of autonomy in terms of time use. Potential gender differences in each case must be taken into account upon formulating these policies for concrete societies. The fact that women have less freedom to move when or where they want, for example, is an important element to be taken into account. It can also vary between different cultures, countries and regions. Thus, reconciliation policies can be seen as an important instrument to facilitate the “functioning” of capabilities and to expand the array of possibilities for both women and men, while leading to more gender equality. They can also affect men; in other words, they can be an instrument for the “doing” and “being” of each and every individual.

#### **4. The Latin American context: informalization of paid work, poverty and globalization**

We can ask ourselves to what extent Robeyns’ list of capacities would be different for Latin American countries. The thesis in this lecture is that the biggest differences between Latin America and countries in the North in terms of time use reconciliation needs can be found in the predomination of informal economy and poverty in the Latin American region, but also in the consequences of the out-migration phenomenon in many countries. The objective is to figure out how to design reconciliation policies in a reality where, first of all, a significant part of production is beyond the reach of public policies. Second, both production and reproduction have become more global, which means part of their control is being transferred to levels that go beyond the national sphere. The rest of this lecture focuses on these aspects.



#### 4a. Informalization and poverty

The huge growth of informal economy in Latin America starting in the 1980s is a well-known phenomenon. Against the predictions of the analysis of the “informal sector” in the 1970s, the “modern” sector has not only failed to absorb the workforce along its borders; its dependence on this workforce and its use has increased, which has led to a growing fusion between what we consider formal/informal. It is for this reason that the term “informal economy” began being used at the ILO 2002 meeting to refer to the predomination of informalization in the economy of many countries. This process has been intensified by globalization, which has led to a strong competition in global markets, and also by neoliberal policies that have imposed a deep economic restructuring since the 1980s and have highlighted the importance of the market in the regulation of distribution and economic processes. As maintained by Pérez-Sainz (2005), in one first stage of neoliberal policies the informal market absorbed a large amount of work that played an important role in the generation and decentralization of the production of goods and services. However, in one second stage of more saturated markets, this absorption has been more limited, thus creating the phenomenon of “the poor producing for the poor” in highly precarious conditions linked to the persistence of poverty in one population sector. This has even happened in cases where macroeconomic indicators have improved, which shows employment and resource distribution are structured in such a way that economic growth is not automatically conveyed to all social strata, as predicted by the neoliberal economic theory.

An illustrative example is that of Bolivia and Ecuador, where the proportion of the working population considered “informal” has increased since the 1980s and has reached levels well above 50% and even in excess of 65% in the case of Bolivia. Likewise, around 50% of the population have remained poor –with fluctuations depending on economic circumstances–, while the level of extreme poverty exceeded 20% in 2002 (Benería and Floro 2005). The growth of the informal economy in both countries has taken place in the context of a high degree of social inequality,<sup>18</sup> which means both informality and inequality are the backdrop of the social tensions and out-migration that have characterized both countries. With high unemployment and underemployment rates –particularly but not exclusively in periods of crisis– the precarious fiscal situation and neoliberal policies have led to a reduction in the role of the public policies. The result has been that, even in economic growth periods, the capacity of the economies in the region to generate employment has not been enough to absorb the existing workforce.

While Bolivia and Ecuador are a special and typical case among Andean countries, other Latin American countries experience similar problems. In Central America, for example, the export production and maquila industries have contributed to the generation of employment and foreign currency but, as is already typical and well-known, under highly unsteady conditions in the case of work done by a high proportion of women. Lack of compliance with labor rights is common and affects female workers both in their work and everyday life (Benería 2005b). Under these conditions of informality, poverty and unemployment or underemployment, thinking of reconciliation policies is complicated, because the patterns followed in economies in the North reflect a different social reality. In the case of Latin America, it is necessary to consider several characteristics for these policies to be effective:

First of all, and unlike the situation in post-industrial economies or even in the case of formal work in Latin America, the “flexibilization” of production encouraged in post-industrial countries (in terms of expanding the array of possibilities in work contracts, work schedules, etc.) is only relevant to the more formal sector. Most working women are in the above-mentioned conditions of informality and poverty, which means production actually has a

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<sup>18</sup> Estimates on Gini’s coefficient in Bolivia for the late 1990s placed it above 0.60, which reflects a situation of high inequality. Estimates for Ecuador showed an increase ranging from 0.52 to 0.54 between 1995 and 1999 (Benería and Floro 2005).

high level of flexibility but lacks regulations linking it to the public policies that could alleviate reconciliation problems.

Second, the high increase in women's participation in paid work over the course of the last two decades in Latin America has involved many changes in women's work conditions, as well as in gender constructions (Piras, comp., 2004). This has led to an increase in women's importance in the family economy and also to significant changes in gender roles. As shown by a study on poor urban households and homeworking households conducted in 2002-03 (Beneria and Floro 2005) both women and men are aware of the fact that women's importance in the generation of the family income has increased considerably; this includes the perception that it is easier for women to find a job compared to men. However, women's responsibility in household and reproductive work does not seem to have declined similarly, which means that, for them, the need to reconcile different types of work has increased. However, in Latin America this need can be very different for different social groups. For middle and upper-class women, access to domestic services and their cost interfere with their sense of urgency, while poor women must address the reconciliation without these resources.

Third, an informal economy has a significant degree of heterogeneity in terms of the different types of work done, as well as in the different combinations of formal/informal work between the different members in a household. In order to analyze this heterogeneity, in the above-mentioned study on Bolivia and Ecuador we can identify three levels of informality --low, medium and high<sup>19</sup>— and we found that most of the households in the sample (70%) were on the medium level, with a somewhat higher proportion of women (71%) compared to men (70%). Likewise, the percentage of women with a high level of informality was also somewhat higher compared to men (16% and 15%, respectively) while the low level was only made up of men. In any event, the high level of heterogeneity complicates the possibility of designing reconciliation policies, because there are no common patterns as far as work is concerned.

Fourth, in addition to this heterogeneity, there is a lot of fluidity between paid and unpaid work, particularly for women, and also between the different types of work. This is paired with a high level of variability in family income, even in those cases where the average income is above the poverty line.<sup>20</sup> In some cases, the level of variability is predictable because the type of work has low and high periods, such as the street sale of toys and handicrafts during the Christmas season compared to the rest of the year), while in other cases it is not possible to anticipate the variation, which involves a high level of risk and insecurity for the family budget. In this regard, it is important to distinguish between poverty and vulnerability because, statistically and on average, some households may not seem that poor; still, they must face a high level of risk, debts and the burden of payments, as well as problems in maintaining a minimum level of consumption in low-income periods.

Finally, there is a lot of fluidity between the informal and formal economies, both in the public and private sectors, and between paid and unpaid work, as a result of situational changes. In times of economic crisis the market economy contracts, employment declines and households must make up for the decline in income with survival strategies. During the last two decades, the feminist literature has highlighted the implications of economic crises for women's work, both in Latin America and other regions (González de la Rocha, 2000),

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<sup>19</sup> We define low informality as that including regular, paid or independent work, with a duration of more than 60 months and a minimum of 19 workdays a month; medium informality refers to independent work with a duration of 24 - 60 months and an average of 12-18 workdays a month and home-based work with a contract of more than one year; finally, high informality includes precarious formal or informal employment or self-employment, classified as temporary and highly irregular or with work available less than 12 days a month, as well as homeworking for a period of less than one year.

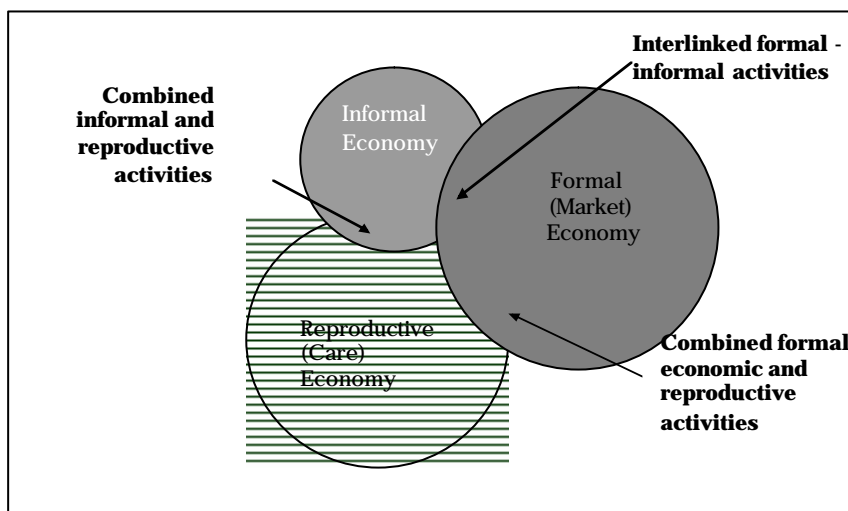
<sup>20</sup> For example, using a "variability index" on income with a value ranging between zero (maximum stability) and one (minimum stability), it was estimated that, in Bolivia, the index reached 0.609 for women and 0.551 for men. In Ecuador the corresponding figures were lower (0.452 and 0.430), thus indicating a lower variability compared to Bolivia, although in both countries it was higher for women than for men. This lack of income security leads to the borrowing of money and the resulting burden of having to pay the debt with interest, a responsibility often falling on women.

particularly in periods of structural adjustment. As shown by figures 1a and 1b, this includes the intensification of informal work, as well as household work.

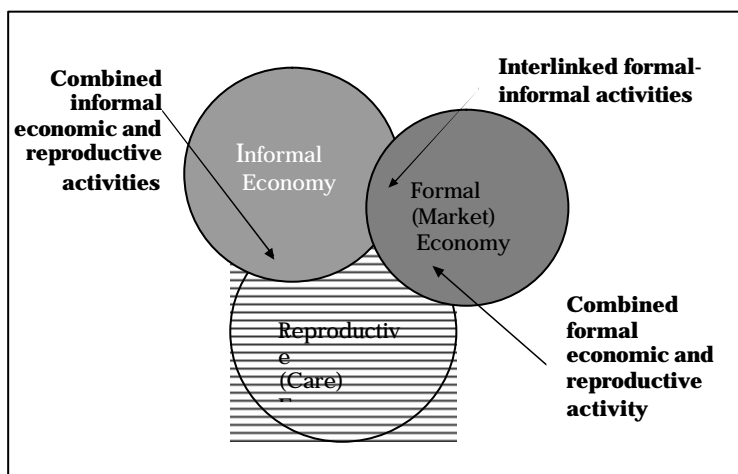
**AREAS OF ECONOMIC ACTIVITY AND TIME USE**

(Source: Benería and Floro, 2005a)

**Fig. 1a. Economic growth period**



**Fig. 1b. Economic crisis period**



In the light of these circumstances characterized by unsteadiness and a significant fluidity between sectors for work in urban households, reconciliation policies must adapt to the needs of these changing situations. Policies designed under formal work conditions can not be very useful where work is unstable and highly heterogeneous. The only permanent element is that of unpaid work in the household sphere. We must seek policies that are not linked to steady jobs and, therefore, are compatible with informality, unpaid work and the instability of production relations described in the case of urban poverty. Let us take a look at several possibilities.

First, the most common denominator to facilitate reconciliation between the different types of work could be any policy assuming responsibility for child care. This points to the importance of creating and promoting child care centers, access to schools and increasing programs that extend the possibility for families in general, and women in particular, to use primary and secondary schools during work hours. Given the concentration of women in

household work, we can logically expect these programs to be of special benefit to them. Second, the same can be said about the health area: any increase in the quantity and quality of health services helps increase family well-being, but it also saves time and reduces the anxiety created by the difficulties in reconciling the different types of work. Third, community services targeted at children and families –such as sports centers and playgrounds- and neighborhood or women’s organizations –such as popular kitchens- can also facilitate the reconciliation of different types of time use. Fourth, other interventions can also help families save time, for example, through urban policies such as the promotion of efficient public or private transportation and improvements in infrastructure such as increased access to telephone services and paving streets to facilitate transportation and cleaning in rainy seasons. Finally, we must not underestimate all sorts of advertising campaigns promoting equal responsibilities between men and women in the division of household work and family responsibilities.

#### **4b. The globalization of reproduction**

Since the 1970s, a significant part of the literature and debates around globalization have focused on the fragmentation, on an international level, of the productive processes, as well as on their multiple effects on global competition, production relocation, de-industrialization in some cases and industrialization in others, transformations in labor markets, the feminization and precariousness of employment, the maquila effects in Latin America, the changes generated by the growing domination of Asian economies, etc. On the other hand, particularly since the 1990s, we have witnessed the globalization of processes linked to reproduction. The growing increase in South-to-North migration, and particularly the feminization of out-migration, responds, to a large extent, to factors significantly affecting the way in which families get organized in both regions, including care and reproduction tasks.

These processes are already well-known and I will only mention them here. On the side of wealthier countries, the so-called care crisis is determined by a variety of demographic factors, including: a) the high level of women’s participation in paid economic activity, which has created a growing demand for domestic services, including elderly and child care; and b) more specifically in Europe, low birthrates and increased life expectancy have contributed to population aging and the relative shortage of care labor. Consequently, it is easy for women from the South to find jobs in the service sector and the domestic economies in the vast majority of countries in the North.

As far as emigrant countries are concerned, economic crises in many countries, and particularly unemployment and underemployment, the persistence of poverty and the deterioration in the standard of living (even if it is only relative compared to that of wealthier countries) lead to the out-migration that, in many countries like Bolivia, Ecuador, the Philippines, México and Central America, has become one of the main foreign currency sources. In the case of the Philippines, for example, it has been estimated that two thirds of migrants are women, many of whom leave their children in their country, either under the care of the father or, even more frequently, of other women, usually relatives (Parrenas 2002). This has led to an intense debate tending to blame migrant women for abandoning their families despite their big efforts to help them, particularly through remittances. In the case of Ecuador, Gioconda Herrera (2004) has conducted an in-depth study on the historical background of out-migration and the national crisis that has caused the exit of many women and young people.

The care crisis has been solved in the North, at least partially, via the “import” of immigrant labor, particularly female labor. Thus, part of the increase in women’s labor participation in the North has been possible thanks to the replacement services of immigrant women, who are shifting from doing unpaid reproductive work in their households of origin to doing relatively paid work in the receiving country. In the case of household work, obviously, this replacement only occurs in households with the capacity to purchase these services; in other words, it only benefits a specific population sector. On the other hand, the transfer of service-related work from the South to the North does not reduce the needs for reproductive

tasks in the South.<sup>21</sup> This involves an intensification of work by the individuals assuming these tasks, which can entail deterioration in care, particularly as a result of its transfer from the mother to other individuals. On the other hand, the debate around the negative effects of women's out-migration on their children points to multiple repercussions that are often contradictory and not easy to evaluate (Parrenas 2002).

It is rather obvious that the globalization of reproduction has implications we are only beginning to understand, including its consequences for reconciliation policies. The transfer of reproductive work from the South to the North, for example, can change the coordinates where this reconciliation must take place. A woman in the South leaving her family to do household work in a home in the North must not face the same time pressures; on one hand, she has left her own household tasks in the hands of other persons but, on the other, she must face all the demands, rules and legal/illegal conditions in the receiving country. Reconciliation policies in the North may not have a direct benefit for the immigrant employee, because they are designed to meet the needs of an average household. On the other hand, in the South these policies must bear in mind the new pressures affecting the use of time by the individuals taking over the migrant's work.

## 5. Final considerations

This article has outlined some differences between Latin American and post-industrial countries in terms of their implications for women's human development and the policies to reconcile the different uses of time. It has been maintained that the high level of informalization in Latin American economies, as well as the persistence of poverty and the growing phenomenon of out-migration, are the basic differentiation factors these policies must take into account in the Latin American case. From the perspective of the capability approach, poverty and informalization affect human development, because they reduce the horizons of a large proportion of the population. In this regard, reconciliation policies must be seen as a way of promoting gender equality, as well as women's human development. However, I have only briefly mentioned the background of these problems: the high level of economic inequality and social differentiation prevailing in the continent and the globalized world. That is the result not only of the historical inequality in the distribution of resources in Latin America, but also of the technological progress and the current world trends resulting from globalization and the predominance of the market in the distribution of resources.

One of the main problems is the high capacity of new technologies to create wealth without generating enough employment for the existing workforce, a problem also seen at the core of the most advanced economies.<sup>22</sup> This adds to the predominance of the financial sector in modern economies, and also to the "victory" neoliberal globalization has represented to capital as far as work is concerned. The result has been an increase in the concentration of wealth and, therefore, of existing inequalities. This is the context in which we discuss reconciliation policies: seeking solutions within existing social and economic coordinates, but without touching the background. For purposes of this article, however, it would seem important to mention these fundamental problems of distribution (and also redistribution) that affect not only the capabilities of every individual, but the possibility of achieving true gender equality.

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<sup>21</sup> It is worth mentioning that there are not enough studies providing data on these processes that can be generalized and also that, on the other hand, their short-term effects, and particularly their long-term ones, are not easy to project. It might be, for example, that out-migration leads to lower birthrates in emigrant countries, which would affect the reproductive work needs of families. Still, there is no doubt that out-migration represents a contradictory process with positive and negative effects on the population involved.

<sup>22</sup> Over the course of the last three years, for example, the monetary value of the benefits of the seven largest companies in Silicon Valley, California, has increased by 500%, while employment generated by the same companies in that area has declined by 2.55% (Markoff and Richtel 2005). This is not a unique case, but characterizes many of the trends we are observing.

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## **THE IMPACT OF FISCAL POLICY ON GENDER EQUALITY, THE TAX STRUCTURE, EXPENDITURE AND INCOME IN EUROPE**

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In principle, we can consider taxes are a paradigmatic case of indirect discrimination, since fiscal discrimination, which in theory goes beyond the sex of taxpayers, has an unobjectionable appearance of neutrality, with no differentiation between men and women. However, this is not the case because, when it comes to income taxes, if the tax system is not of an individual nature it affects some taxpayers more than others as a result of their marital status and/or the type of family they belong to.

If we consider the principle of tax equity states that any receipt of income in the family unit must be taxed at the same tax rate, regardless of who gets it, there is no doubt fiscal discrimination exists if this does not occur. In this paper I introduce an index that attempts to measure the existing level of discrimination against the second receiver in the different forms of family taxes currently in force in different EU countries.

I also attempt to highlight the importance of institutional support to people care in assessing its impact, along with that generated by fiscal penalties in the case of personal income tax.

### **Lack of neutrality in the different European Union tax legislations from a gender perspective**

Since the early 1980s, the European Commission has made an attempt to achieve equal treatment for men and women in all the fields of community policy. In this regard, Action 6 of the new 1982-1985 Community Action Program<sup>23</sup> highlighted the need for measures to correct the harmful effects of tax legislation on the labor market, particularly in those member countries whose tax system discouraged the entry of married women into that market.

### **Fiscal discrimination against the entry of married women into the labor market in the European Union.**

The European Commission identified several areas where tax systems generate a negative effect on married women. The main ones included sensitive points such as aggregating income in the family unit, the *a priori* transfer of reductions and deductions to the spouse, the impossibility for each of them to report their own income, and maintaining the spouses' joint liability. This 1981 report concluded by recommending individual taxes as a key element in achieving an equal treatment of men and women and, thus, urged member states to include the fiscal system reform in their agenda.

In this regard, the objective of this paper is to empirically confirm some of the recommendations in the European Commission report, particularly the advantages of individual taxation, from the standpoint of the equal treatment of men and women. The analysis confirms the fiscal penalty imposed on the second income receiver in the family unit in the case of income taxes in different countries of the European Union.

Tax harmonization in the European Union has led to a quite homogeneous tax structure in its member States; but the same can not be said about individual income tax, which continues to be an exception, given the discrepancies in its composition. Still, the acceptance of the

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<sup>23</sup> *New Community Action Programme 1982-1985* [COM (81) 758 final]

individual model has become more common over the last few years; in fact, most member States have chosen to implement individual or optional taxation.

The truth is that a hypothetical and simple classification of fiscal systems –whether individual, joint or optional reporting has been adopted– can not be established. The reason is that the simplicity of this classification is nothing but a mirage, because the only common trait of individual taxation, in the sphere of the European Union, is its complexity and diversity. In fact, no individual taxation system is the same, and the joint tax return system also differs in each country.

Based upon this consideration, and considering the passive individual –that is, the one income is attributed to, whether an individual or a family unit— as the only classification criterion, it would be worth establishing a distinction between *individual taxation* systems and *family or joint taxation systems* (which consider the joint income of all the individuals making up a family).

On the other hand, income accumulation within the family unit can be designed in very different ways, which leads to different tax variations. It might be that the sum of the family’s joint income is considered similarly to that for unmarried individuals (that is, subjected to the same tax scale), in which case the system is called *cumulative tax*. However, if the total family income is divided into a coefficient, in an attempt to mitigate the excess tax, the system is known as *splitting* (if the coefficient is divided into the 2 spouses) or *family quotient* (if the coefficient considers the total number of individuals making up the family unit). There is one third possibility, the so-called *optional tax*, a system adopted by those countries that, upon evolving into individualized systems, continue to allow for joint taxes, which is the case in Spain. This latter variable allows joint taxpayers in a single-parent or two-parent family to choose between an individual tax return or a joint family tax return.

Based on the taxpaying unit, and according to the above-mentioned options, the following classification can be made within the European Union:

<u>Taxpaying Unit</u>	<u>Tax system</u>	<u>Forms</u>
Individual	Individual tax	Individual
Family	Family tax	Cumulative <i>Splitting</i>
Individual /family	Optional tax	Individual/Cumulative Individual/ <i>Splitting</i>



Based on this classification, tax systems in the EU countries would be organized as follow:

Individual taxes	Comments
Austria, Denmark, Finland, Greece, The Netherlands, Italy, United Kingdom, Sweden	Family members file tax returns using a single document. Capital income accumulation on highest-income spouse.
Joint Tax	Comments
Belgium (*)	“Marital quotient”: income earned is taxed separately. If one of the spouses does not generate income, a percentage of the other’s income is assigned to him/her.
France	Family quotient
Luxemburg	<i>Splitting</i>
Portugal	<i>Splitting</i>
Optional tax	Comments
Germany	Individual/ <i>Splitting</i>
Spain	Individual/Cumulative
Ireland	Individual/Cumulative/ <i>Splitting</i>

(\*) It is considered a joint tax because the family is the passive subject.  
(Source: prepared by the author based on OECD’s *Taxing wedges*, Paris, 2000 and *Fiscalidad Europea Básica*, Editorial CISS, 2000)

If we consider the tax equity principle states any receipt of income within the family unit must be taxed at the same tax rate, regardless of who receives it, there is no doubt fiscal discrimination exists if this does not occur. In the following section I will introduce an index attempting to measure the existing level of discrimination against the second receiver in the different forms of family taxes currently in force in the European Union.

**Family tax discrimination index**

If we consider the tax equity principle, according to which the receipt of a given income within the family unit must be subjected to the same tax rate, regardless of the member receiving it, discrimination against one of its members will exist if this condition is not met.

Therefore, measuring its intensity is of interest, as it allows for comparisons between different tax systems.

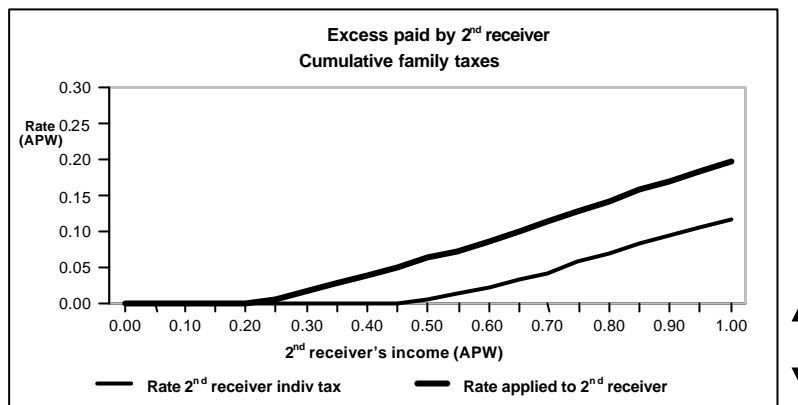
The characteristics of individual income tax are defined by the group of elements and parameters making it up: taxable income, deductible expenses, tax base reduction, types of rates, deductions, etc. The fiscal penalty on income generated by the second receiver can be determined through the excess tax, E, paid by this taxpayer, compared to the tax rate he/she would have to pay in the case of optional taxation, as shown in the following formula:

E = rate applied to 2<sup>nd</sup> receiver - rate for 2<sup>nd</sup> receiver in individual taxation  
which expressed as a percentage of the rate applied to the 2<sup>nd</sup> receiver would be:

$$E (\%) = [\text{rate applied to 2}^{\text{nd}} \text{ receiver} - \text{rate for 2}^{\text{nd}} \text{ receiver in individual taxes}] / [\text{rate for 2}^{\text{nd}} \text{ receiver in individual tax}]$$

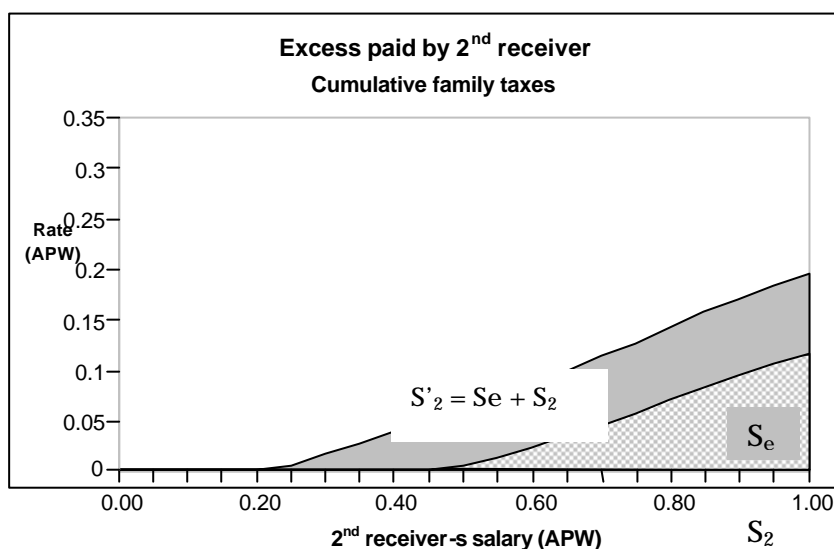
The following graph shows this excess for cumulative family taxes, for different APW income levels<sup>24</sup>, the thick line showing the tax debt for the second receiver and the fine line that if the receiver paid individual taxes. The difference between the two shows the excess tax (the vertical arrow).

<sup>24</sup> The salary unit used is the average wage for a full-time worker in the manufacturing sector (an average production worker, APW), according to the definition provided by OECD, considered as a standard group that allows for the simultaneous analysis of different countries in a homogeneous fashion. Its amount is determined by the OECD and its values have been used in this study. The APW for 2002 was 16.219 €/year for Spain.



(Source: prepared by the author)

Thus, the excess tax faced by the second receiver in the case of cumulative taxes is shown by the area between the curves representing both rates ( $S_e$ ), as shown in the following graph:



(Source: prepared by the author)

Where no excess tax exists, both curves overlap and the area between them equals zero; however, if discrimination takes place, the emerging area allows us to appreciate the existing excess tax.

The relationship between area  $S_e$  (excess tax) and the area determined by the line indicating the rate for the second receiver,  $S_2$ , allows us to identify the degree of discrimination experienced in these cases. Its intensity can be measured through the relationship between both areas  $S_e / S_2$

The values adopted by  $S_2$  range from zero to  $S'_2$  (the area defined by the values of the rate applied to the second receiver and equal to  $S_e + S_2$ ), this being the reason why values in this relationship range from infinite ( $I = S_e / 0$ ) to zero ( $I = S_e / S_2 = (S'_2 - S_2) / S_2 = (S_2 - S_2) / S_2 = 0 / S_2$ ).

This fact involves a certain difficulty in measuring the degree of discrimination, this being the reason why we chose the relationship between area  $S_e$  (excess tax) and that defined by the line showing the rate applied to the second receiver  $S'_2$ . Therefore, the intensity of the excess tax can be measured by means of index (I),

$$I = S_e / S'_2$$

which can also be expressed as,

$$I = (S'_2 - S_2) / S'_2$$

Thus,

$$I = 1 - (S_2 / S'_2)$$

with  $S_2$  being the area defined by the rate for the second receiver in case individual taxes are paid.

The disadvantage of this index is that its variation range is between 0 and 1. If no discrimination existed, it should be confirmed that  $S_e = 0$ , that is,  $S'_2 - S_2 = 0$  and, therefore,  $I = 0$ . On the contrary, if  $S_2 = 0$ , that means there is no individual taxation, because that possibility is not considered (similarly to compulsory cumulative taxation, with no mechanism to correct the excess tax), with the condition  $I = 1$  being met in this situation. Thus, the extreme values  $I$  can adopt range from a minimum of 0 (where there is no discrimination) to a maximum of 1 (in case the highest possible level of discrimination occurs).

The index calculated in this manner provides a measure of the relative discrimination for income received by the second receiver. Because it is calculated as a relationship between areas, it becomes a dimensionless number and represents a valid means to make comparisons between countries with different tax systems.

From an analytic standpoint, the index can be expressed as follows:

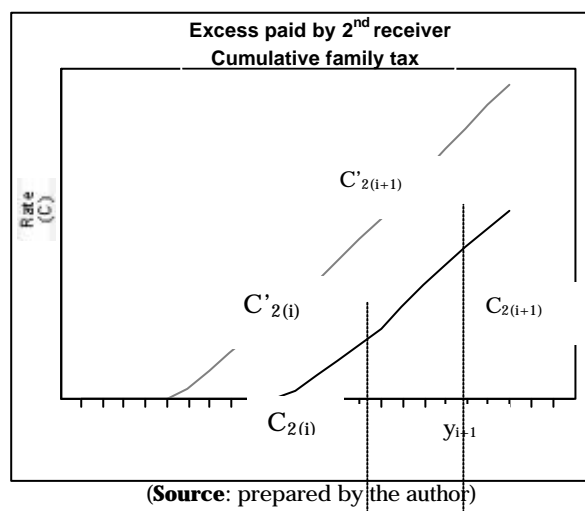
$$I = [ \int f_2(y) \cdot dx - \int f_2(y) \cdot dx ] / \int f_2(y) \cdot dx \quad [1]$$

with  $f_2(y)$  and  $f_2(y)$  being the functions representing the individual and applied rates for the second receiver.

For discontinuous functions, such as those used in this paper, the area corresponding to excess tax is determined by the expression:

$$I = S_e / S'_2 = [(C'_{2(i+1)} - C_{2(i+1)}) + (C'_{2(i)} - C_{2(i)})] / (C'_{2(i+1)} + C'_{2(i)})$$

as shown by the following graph:



Therefore, the index values, as stated in the former expression, range from zero to one. The minimum (zero) corresponds to tax systems that do not discriminate against the second

receiver, which increases the index value as the penalty increases. Thus, a tax with an index higher than another shows the former is more discriminatory than the latter.

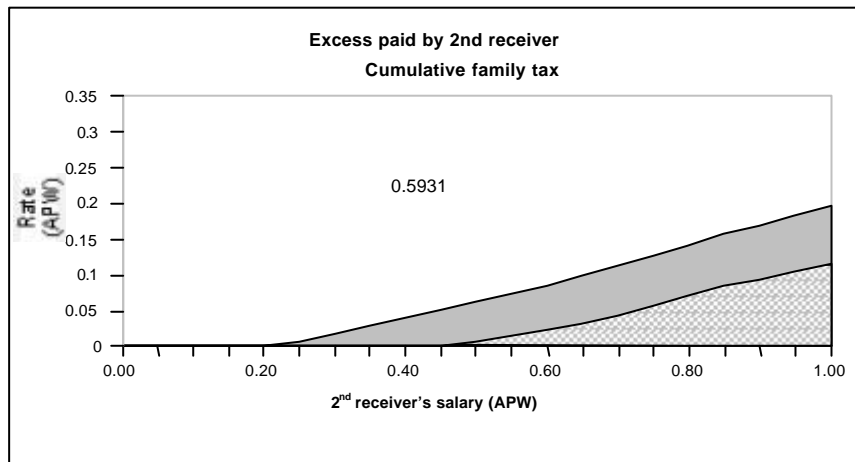
**Calculation of the fiscal discrimination index for different countries in the European Union**

This section explains how the index is applied to the different incomes taxes in the European Union countries for 2000: through the graphic representation of areas  $S_e$  and  $S_2$ , as well as the value of index I, calculated based on expression [3], in the case of a childless married couple where the main receiver gets a gross income equivalent to 1 APW. We must remember that, in developing the discrimination index proposed, we are only considering income received by the members of the family unit,  $Y_1$  e  $Y_2$ , omitting all the rest.

**Cumulative tax**

We have taken the Spanish IRPF as an example of cumulative taxes, under the assumption of joint tax returns. As already explained, the excess tax faced by the second receiver results from the fact that his/her income is taxed, as a minimum, at the marginal rate for the main receiver, with no reductions, because the rate he/she should get (the personal minimum) is being used by the spouse. If an individual tax system was applied to this receiver, the amount corresponding to the personal minimum and the inferior marginal rate in the tax scale (18% or 15% since 2003) could be applied.

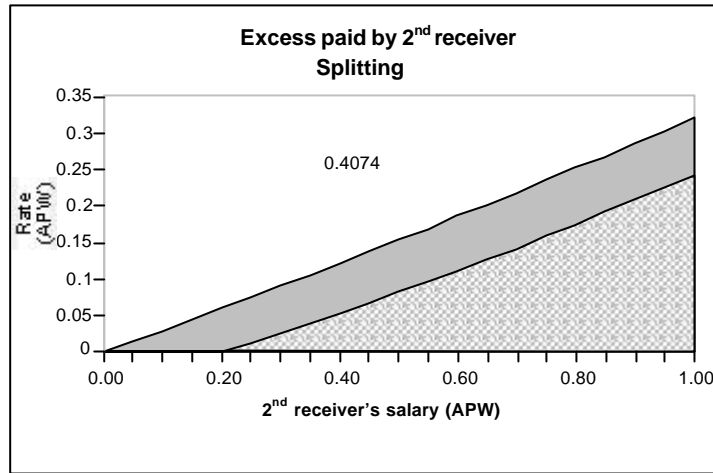
The following graph represents areas  $S_e$  (gray) and  $S_2$  (points), with the index value calculated by means of the expression  $I = S_e / S_2$  reaching 0.5931, the second highest among the twelve European countries studied in this paper although, due to the lack of space, I have only included the graphic representation of a very limited number of them. I must stress that, in the Spanish case, this discrimination becomes more significant as the main receiver’s income increases, a consequence of applying a higher marginal rate.



(Source: prepared by the author)

**Germany: *splitting***

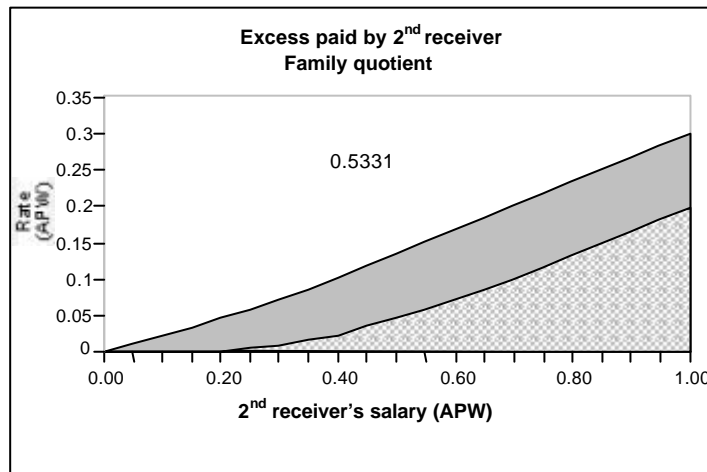
The German *splitting* has a discrimination index of 0.4074, which can be classified as medium compared to other EU countries. It is not as high as that of cumulative tax, but it shows the transfer of the tax burden from the main receiver to the second one is significant for labor incomes around 1 APW, because the second receiver’s income is added to the spouse’s income (that is, 50%) and is subjected to a marginal rate higher than that applicable if individual taxation applied.



(Source: prepared by the author)

**France: family quotient**

The French family quotient is a form of *splitting* where the coefficient is a function of the family typology and the number of dependants. For childless marriages, the quotient is 2. Thus, we would expect the discrimination index for the French tax to be identical to the German one. But that is not the case because, as already stated, the degree of discrimination of one tax not only depends on the taxpaying unit adopted, but also on the rest of the parameters making it up.

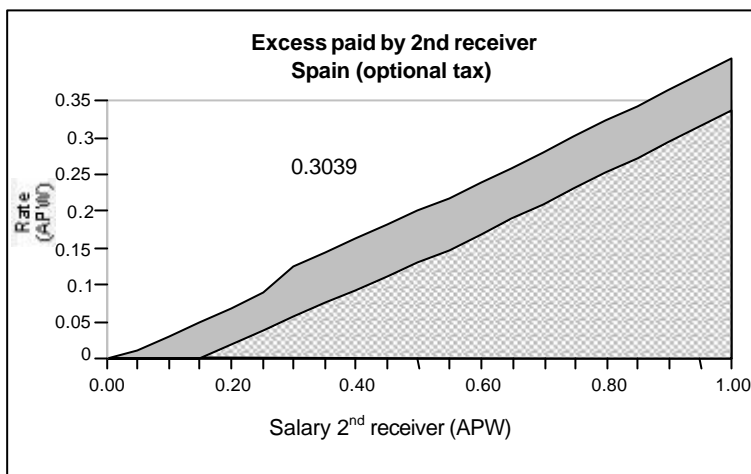


(Source: prepared by the author)

Thus, the French family quotient applied to a childless marriage has a discrimination index of 0.5331, which is higher than the German one or, in other words, the French tax discriminates the second receiver more than the German tax, in the assumption made here.

**Denmark: individual**

In the case of the Danish tax, discrimination is generated as a result of a deduction in the personal rate. In case the rate is not completely used by one of the spouses due to lack of income, the excess is automatically transferred to the other spouse.

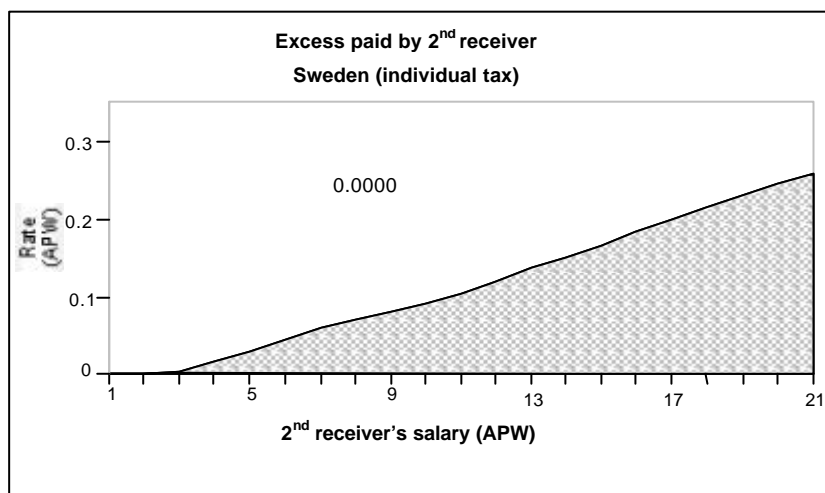


(Source: prepared by the author)

As a result of all this, the Danish tax has a degree of discrimination of 0.3039

**Sweden: individual**

Sweden has the clearest example of individual taxes. The Swedish personal tax is completely individualized and does not involve any reductions, deductions or income transfer between members in a family unit, which makes it a non-discriminating tax. Another of the characteristics of this tax is the null effect of personal and family circumstances on the tax liability calculation: direct expenditure –made via the social policy and an abundant offer of services for people throughout their lifespan– replaces fiscal expenditure.



(Source: prepared by the author)

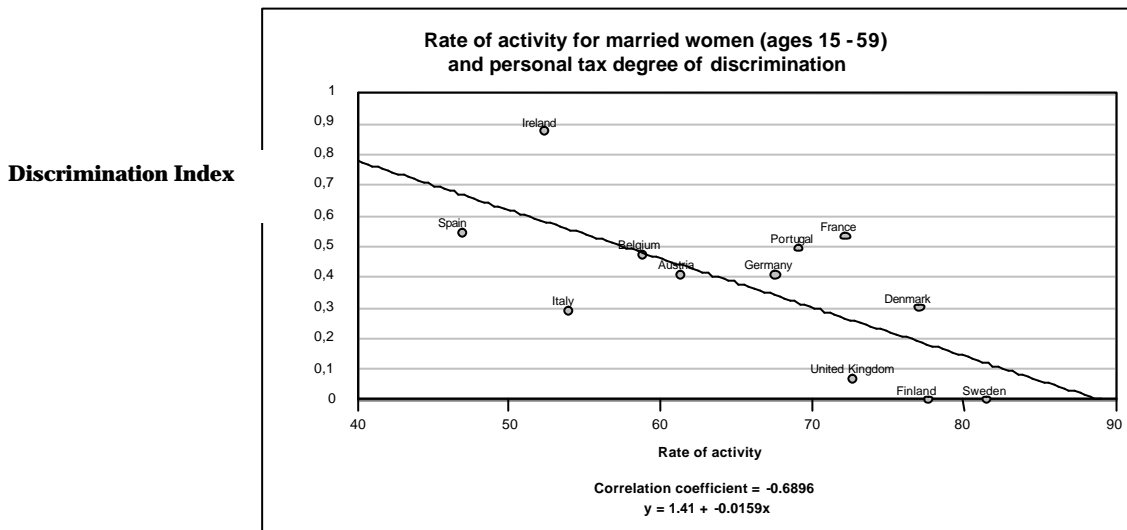
As can be seen in the previous graph, the penalty index for the second receiver in the Swedish case is zero.

**Values of the fiscal discrimination index in twelve European Union countries**

The analysis of the different countries so far shows those countries with a lower index of discrimination on the second receiver's income are the ones that have adopted individual taxes, and those with the highest are those with family taxes as a base. This highlights the fact that all forms of taxes other than the individual tax somehow harm the second income receiver in the family and pose an obstacle to his access to, or permanence in, the labor market.

If we compare the variable for the different fiscal discrimination indices in twelve EU countries against the variable “rate of activity for married women”, as shown in the following graph (although they were not included in these pages due to the lack of space), we get the following relationship:

<u>Country</u>	<u>Rate of activity</u>	
	<u>Married</u>	<u>Index</u>
Sweden	81.5	0.0000
Finland	77.6	0.0000
United Kingdom	72.7	0.0698
Italy	54.0	0.2907
Denmark	77.1	0.3039
Germany	67.6	0.4074
Austria	61.3	0.4076
Belgium	58.8	0.4724
Portugal	69.1	0.4945
France	72.2	0.5331
Spain	46.9	0.5475
Ireland	52.4	0.8777
Correlation	-0.6895	



(Source: prepared by the author based on Eurostat: *EU Labour Force Survey results 2001. Data 2001, Luxembourg 2002*)

Each point in the graph represents a country, its situation being shown by the rate of activity for married women (horizontal axis) and the personal tax discrimination index (vertical axis). The higher the rate of activity, the farthest to the right the country’s position in the graph; as its fiscal degree of discrimination increases, the higher its position will be. Thus, a country with a high rate of activity for married women and a low fiscal discrimination index, such as Sweden, should be on the right bottom section of the graph.

Therefore, three different areas can be identified: the first one includes countries with a rate of activity for married women below 60%; a second area includes rates between 60% and 80%; and one third area includes those countries with values above 80%. If we pay attention to the area where each country is located, we can see that countries with discriminatory fiscal systems (and high degrees of discrimination), such as Ireland and Spain, show low rates of activity for married women while, by contrast, those with a lower degree of discrimination such as Sweden, Finland and Denmark, have high rates of female activity, in the neighborhood of 85%. Countries with intermediate fiscal discrimination indices have rates of activity between 65% and 77%.

The correlation coefficient between these two variables is  $-0.6895$ , which seems to indicate the existence of a certain relationship between them. Nevertheless, it is necessary to understand that fiscal policy is not the only determinant of a higher rate of female labor participation, because there are other factors related to the existence of people care services that also influence married women's decision to continue or not in the labor market and allow women and men to reconcile their professional and family life.

Weighing the number of years of implementation would be interesting, considering the effect of the fiscal individualization process is not immediate, but requires a certain period of time to achieve the desired effect. Consequently, the effect of its implementation over the course of decades can not have been the same as that after a limited number of years.

Therefore, future studies should consider:

- 1) the number of years elapsed since its implementation
- 2) the intensity or degree of individualization.

2, a: That is, if the process has also been extended to capital income like in Sweden or Denmark or, on the contrary, like in the Netherlands, that income is attributed to the spouse with the highest income.

2, b: If a single document must be filled out, with the resulting loss of privacy.

### **Special reference to the Danish and French cases**

According to Margaret Maruani<sup>25</sup>, Denmark and France show a similar evolution in the graphic representation of female activity curves over recent years. However, their tax systems differ significantly, considering that individual taxes exist in the former and joint taxes, adjusted via a family quotient, persist in the latter.

This evolution would seem to contradict what we have outlined in these pages and might show the limited relevance of the tax unit in income taxation in the female work offer. This is considering the values of the fiscal discrimination index are  $0.30039$  and  $0.53331$ , respectively; that represents a difference of more than two tenths (23 hundredths), which is lower than we might expect in a classification exclusively and strictly based on analytical categories determined by the tax unit (individual or family). We can also see this difference is smaller than that between Sweden and Denmark (three tenths or 30 hundredths), both of them countries with individualized tax systems.

Therefore, new analysis parameters must be introduced in income taxation to identify the intensity of the fiscal penalty between countries with similar fiscal systems (individualized and non-individualized).

Finally, before concluding this section I would like to highlight the importance of institutional support provided for people care, measured with respect to the economic effort made in terms of social expenditure compared to the GDP. The use of indicators on coverage in the delivery of public services for specific population groups also allows us to consider other reasons in addition to the impact of personal income taxes within public policies, as explained in the following sections.

### **Analysis of social policy from the perspective of reconciling the professional and family life**

There is no doubt that the degree of female participation in the labor market depends, to a large extent, on the potential obstacles posed by inappropriate fiscal policies, but

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<sup>25</sup> Margaret Maruani: Trabajo el empleo de las mujeres. Editorial Fundamentos , 2002, pages 28-29



something unquestionable is the fact that its analysis does not exhaust all the reasons explaining women’s variable behavior upon entering (or not entering) the EU market. The design of social policy, on the other hand, is a key factor when it comes to facilitating (or not) the reconciliation of the professional and work life for women and men, along with the presence of institutional measures, such as appropriate school hours encouraging the implementation of a more equalitarian distribution of care time between both sexes.

The following table shows the budgetary effort in the field of child care made by different countries with respect to the Gross Domestic Product:

**Table 3**  
**Social benefits for the child care family function (% of GDP)**

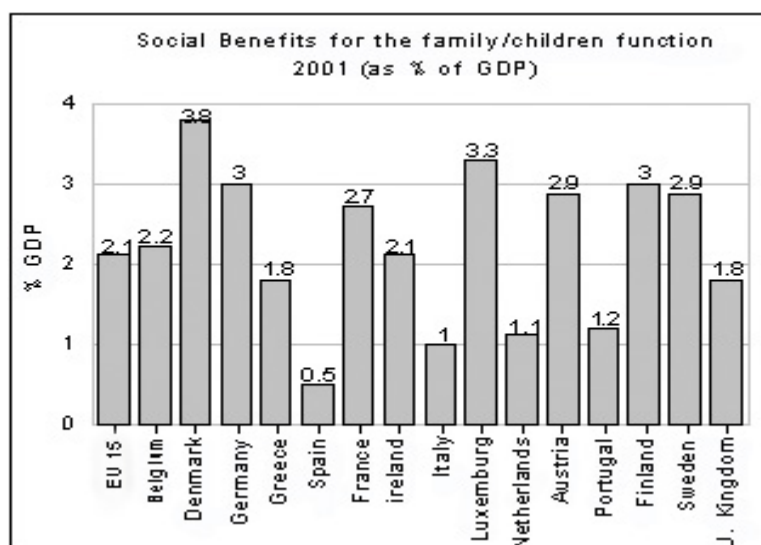
	<b>1980</b>	<b>1985</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>
EU-15			2.0	2.0	2.1	2.1	2.1	2.3	2.3	2.2	2.2	2.1	2.1	2.2
Belgium	3.1	2.7	2.3	2.3	2.4	2.3	2.3	2.3	2.4	2.4	2.4	2.3	2.2	2.2
Denmark			3.4	3.5	3.7	3.9	3.9	3.8	3.7	3.8	3.8	3.7	3.8	3.9
Germany	2.5	1.9	2.1	2.2	2.2	2.1	2.1	2.7	2.9	2.8	3.0	3.0	3.0	3.1
Greece			1.7	1.7	1.7	1.9	1.9	1.9	1.8	1.9	1.8	1.9	1.8	1.8
Spain	0.7	0.4	0.3	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5
France	2.9	2.8	2.7	2.7	2.9	2.9	2.9	2.9	3.0	2.8	2.8	2.7	2.7	2.7
Ireland	1.7	2.4	2.1	2.2	2.2	2.2	2.2	2.2	2.1	1.9	1.8	1.7	2.1	2.4
Italy	1.4	1.2	0.9	0.8	0.8	0.8	0.8	0.8	0.9	0.9	0.9	0.9	1.0	1.0
Luxemburg	2.6	2.1	2.3	2.4	2.8	2.9	3.0	3.0	2.8	3.0	3.3	3.4	3.3	3.7
The Netherlands	2.6	2.2	1.7	1.6	1.6	1.4	1.3	1.3	1.3	1.2	1.1	1.2	1.1	1.2
Austria	3.3	3	2.7	3.0	3.2	3.5	3.3	3.1	2.9	2.7	2.9	3.0	2.9	2.9
Portugal			1.0	1.0	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.2	1.1
Finland	1.9	2.6	3.9	4.2	4.1	4.5	4.1	3.8	3.6	3.4	3.3	3.1	3.0	3.0
Sweden			:	:	4.6	4.5	4.0	3.7	3.5	3.5	3.4	3.4	2.9	3.0
United Kingdom			2.1	2.3	2.4	2.4	2.4	2.4	2.3	2.3	2.0	1.8	1.8	18.0

(Source: Prepared by the author based on Eurostat: *European Social Protection Expenditure and Receipts. Data 1991-2002*, p 79, Brussels 2005. For 1980 and 1985 data, Eurostat: *European Social Protection Expenditure and Receipts, Data 1980-1997*. Brussels, 2000 P. 58)

In the case of Spain we can see a dramatic decline throughout the period, with a sudden loss of specific weight over the first five-year period in the decade of the 1980’s that still persists. Italy shows a gradual decline year after year, but without reaching the exiguity of the Spanish case.

If we take a look at the following graph, we can see the relative importance assigned to this function in each country:

Graph 9



(Source: Developed by the author based on Eurostat's European Social Protection Expenditure and Receipts. Data 1991-2002, Brussels 2005, p 79)

- With a predominant position in 2001, we have Denmark, Luxemburg, Finland and Germany, with social expenditure in the field of family care equal to, or above, 3% of their Gross Domestic Product (GDP); next, we have Sweden (2.9%) and France (2.7%). The following four have a situation we could consider intermediate, with an economic effort between 2.2 and 1.5% of the GDP, and in descending order of expenditure we have Belgium, Ireland, the United Kingdom and Greece. The rest of the countries show an economic effort equal to, or below, 1.2% of the GDP. The low figures for Italy and Spain, with 1% and 0.5% of their GDP, call our attention.

There is doubt as to whether public expenditure in the field of child care encourages women's entry into the labor market, but the form of achieving this objective is not the same where economic transfers are preferred, compared to those situations where public child care services are delivered through nurseries or specialized home assistance.

OECD's Report, *A caring World. The New Social Policy Agenda*<sup>26</sup>, points out that:

- "Expenditure in family social services (which includes child care) is generally small in most OECD countries, with the significant exception of Nordic countries. However, these gross totals are difficult to interpret, because child care is supported in many different ways. In France, taxable expenditure is important (see OECD, 1996j); Australia provides financial support for child care services, and the United Kingdom provides a "free area" in most internal job benefits, thus reducing the net cost of child care".

As explained in the previous section, public expenditure in the field of child care in the European Union differs from one country to another, but once adopted as part of public policy, a second significant problem arises, from a gender perspective, upon attempting to answer the following questions: 'What are these budget items spent on?' and/or 'What are the priorities of this social expenditure?' There is no doubt that all the different measures make a different contribution to reconciling family and work life, and also that there is a difference resulting from the existence of economic transfers (paid maternity or parental leaves, or leaves for the father only –for example, the father's month in Sweden- that tend towards a more equitable distribution of care work in an attempt to change the sexual division of labor in the family); or from the provision of child and disabled care services or services for care of elderly dependants in permanent care centers, or care provided by specialized individuals in their homes.

<sup>26</sup> (*Un mundo de cuidados. El programa de la Nueva Política Social*). European Commission, Directorate General V

If the political will to implement them exists, all these hypothetically feasible alternatives demand a profound reflection by the different social forces, as well as an in-depth debate both on a political and social level. Individuals with political responsibilities can no longer turn their back on, or ignore, the reality of the everyday life of women with a double work shift and an active participation in the labor market.

It might be that people care is not perceived as a social activity from a collective standpoint, and also that the lack of sensitivity associated with a deformed perception of the current socio-economic reality is reflected in budgetary policy, with limited allocations to achieve it. Unfortunately, this attitude still persists in Spain and, to a lesser extent, in Italy, which ultimately shows that these tasks remain invisible in both countries, beyond the National System of Accounts and political debate. They remain in the private family sphere, without actually being of public interest or, at least, not enough to demand an economic effort consistent with its magnitude.

In the case of child care centers for workers, the number of spots shows a decline between 2002 and 2003, from 18,648 to 13,124, even though data for some provinces are not available.

#### ***Chile care coverage for children 0- 3***

	<b><u>Public and private centers</u></b>		<b><u>Public centers</u></b>	
	<b><u>Year</u></b>	<b><u>0 - 3</u></b>	<b><u>Year</u></b>	<b><u>0 - 3</u></b>
Germany	2000	10		
Germany - FR			1996	2.2
Germany - DR			1996	41.3
Austria	1998	4	1994	3
Belgium	2000	30	1993	30
Denmark	1998	64	1994	48
Spain	2000	5	1993	2
Finland	1998	22	1994	21
France	1998	29	1993	23
Greece	2000	3	1993	3
The Netherlands	1998	6	1993	8
Ireland	1998	38	1993	2
Italy	1998	6	1991	6
Luxemburg	NA	NA	NA	NA
Portugal	1999	12	1993	12
United Kingdom	2000	34	1993	2
Sweden	1998	48	1994	33
Norway	1997	40	1995	31

**Source**, prepared by the author based on: for public centers, *European Commission Care in Europe*, p. 27 (taken from Deven, Inglis, Moss, Petrie, 1997 Table 1.1) and for public and private centers, *OECD Employment Outlook*, June 2001, p. 144

The public care deficit translates into a lack of possibilities for reconciliation and an increase in gender inequality.

Now well, in other cases, where sufficient budget allocations exist for the provision of care services, it is necessary to analyze, *a posteriori*, if these allocations consider women's interests, as explained above, as part of budget analyses from a gender perspective. It would be unfortunate to see this economic effort wasted in supporting obsolete schemes proposed by an ideology advocating the role of the traditional housewife in the bourgeois family (with a single income receiver as the exclusive subject of direct social rights),

beyond the actual experiences of most women both in the European Union and the rest of the world in the 21<sup>st</sup> century.

### Social expenditure for elderly care

As regards the Spanish public expenditure allocated to the elderly, we must stress the fact that this is a fundamental budget item as a result the progressive aging of their population and the number of votes represented by this group in any electoral battle. Its evolution since the 1980s is not negative, contrary to social expenditure in the field of child care; it actually increased by approximately 2.5% of the GDP, starting in the early 80s, as shown in the following table:

**Table 4**  
**Evolution of social expenditure for elderly care as a % of the GDP**

	<u>1980</u>	<u>1985</u>	<u>1990</u>	<u>1991</u>	<u>1992</u>	<u>1993</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>
EU 15						10.6	10.7	10.8	10.9	11	10.9	10.9	11	10.9	11
Belgium	6.8	7.3	7.4	7.8	8	8.5	8.5	8.5	8.6	8.6	8.7	8.7	8.5	8.8	8.8
Denmark			10.6	10.7	10.7	11	11.8	11.8	11.9	11.6	11.3	11.1	10.8	10.9	11
Germany	10.8	11.1	10.6	10.6	10.8	11.1	11	11.3	11.5	11.4	11.5	11.5	11.6	11.8	12
Austria	9	9.9	10	10	10.1	10.5	10.6	10.7	10.7	10.9	10.8	10.9	11	11.3	11.5
Greece			9.3	8.8	8.8	9	10.5	10.7	11	11.1	11.8	12	11.8	12.7	12.2
Spain	6.2	7.5	7.4	7.6	8	8.4	8.4	8.5	8.6	8.5	8.5	8.3	8.5	8.3	8.3
France	8.1	9.4	9.5	9.8	10.1	10.5	10.7	10.8	11	11	10.9	10.9	10.7	10.8	10.6
Ireland	4.7	5	4.3	4.4	4.4	4.3	4.1	3.7	3.3	3.1	2.9	2.7	2.6	2.8	2.8
Italy	8.3	10.3	11.2	11.6	12.6	12.8	12.6	12.6	12.4	12.9	12.8	12.9	12.8	12.7	12.9
Luxemburg	8	6.6	6.7	6.9	7.1	7.1	9.1	9.4	9.3	8.9	8.3	7.8	7.2	5.5	5.9
The Netherlands	7.5	8.5	9.9	9.9	10.1	10.2	9.4	9.5	9.6	9.6	9.5	9.6	9.5	9.3	9.5
Portugal			4.8	5.2	5.5	6.1	6.2	6.9	7	7	7.1	7.4	7.7	8.1	8.6
Finland	6.1	7.3	7.3	8.4	9.4	9.7	9.2	8.9	9.2	8.5	8	8.2	7.9	8.1	8.4
Sweden						13.1	12.7	12	12.3	12.1	12	11.7	11.3	11.5	11.7
United Kingdom			8.2	8.8	9.3	9.5	10.6	10.6	10.8	11	10.7	10.7	11.6	11.3	11.3
Iceland				4.7	4.9	5	4.9	5	5.1	5.2	5.3	5.4	5.6	5.5	6.2
Norway			8.4	8.5	8.8	8.7	7.9	7.7	7.4	7.3	8	7.9	7.1	7.4	7.4

(Source: For 1995-2002 data, Eurostat: *Social protection expenditure and receipts. Data 1991-2002*. Luxembourg 2004, p. 77. For 1985-1994 data, Eurostat: *Social protection expenditure and receipts. Data 1991-2000* Luxembourg 2003, p. 77

Despite this positive evolution, the result obtained, measured in terms of care coverage for that group, is insufficient if compared to other countries in the European Union.

**Table 5**

	<b>% of people above 65 in institutional care</b>	<b>% of elderly people receiving care services in</b>
Austria	4,7(0)	3,0(0)
Belgium	4,0(S)	6,0(0)
Denmark	5,7(0)	17,0(0)
Finland	7,2(0)	24,0(0)
France	3,0(S)	7,0(S)
Germany	5,0 (R)	3,0(S)
Greece (°)	0,5 (S)	
Iceland	alto (R)	High (R)
Ireland	5,0 (S)	3,0(S)

Italy	2,0(S)	1,3 (R)
The Netherlands	10,0(S)	8,0(0)
Norway	7,1(0)	14,0(0)
Portugal	5,0 (R)	1,5 (R)
Spain	2,8(0)	1,0(S)
Sweden	5,4(0)	13,0(0)
United Kingdom	5,1(0)	13,0(0)

(O) OECD. Data for 1986-94, (S) Anttonen, Sipilä (1996). Data for 1985-92, except for Belgium: 1981, (R) Experts Report. Data for 1994 for Germany, 1995 for Iceland and 1994 for Portugal (\*)  
 20 pilot projects on homecare underway and 112 starting in 1998 (Source: European Commission (DG V/D/5): *Care in Europe*. Brussels, 1998, p. 35)

In spite of this limited coverage, the European experts' network considers that, in some Continental or Southern countries, the lack of social services for this age group does not have the same effect on women's employment and the lack of child care services:

*“If we discount for the fact that all these countries are moderately good providers of care services to older people ( and the handicapped ), we come to the conclusion that in Continental and Southern countries the impact on female employment and earnings of care responsibility towards older people is not as strong as it is for children, but is significant nevertheless”<sup>27</sup>.*

**Index of reconciliation between the family and professional life for men and women to evaluate public policy**

Bearing in mind the above explanations, and in an attempt to evaluate its impact, a composite index of reconciliation between the family and professional life for men and women has been developed. The variables used are shown in the following table:

Variables used in developing the reconciliation index:

Country	Fiscal		Child care		Elderly care	
	Discrimination		% coverage	Pub. Expendit.	% coverage	Pub. Expendit.
	Index					
	A	B	B1	C	C1	
Sweden	0	33.0	2.9	18.4	11.5	
Finland	0	21.0	3.0	31.2	8.1	
United Kingdom	0.0698	2.0	1.8	18.1	11.3	
Italy	0.2907	6.0	1.0	3.3	12.7	
Denmark	0.3039	48.0	3.8	22.7	10.9	
Germany*	0.4074	2.2	3.0	8.0	11.8	
Austria	0.4076	3.0	2.9	7.7	11.3	
Belgium	0.4724	30.0	2.2	10.0	8.8	
Portugal	0.4945	12.0	1.2	6.5	8.1	
France	0.5331	23.0	2.7	10.0	10.8	
Spain	0.5475	2.0	0.5	3.8	8.3	
Ireland	0.8777	2.0	2.1	8.0	2.8	
Minimum	0	2	0.5	3.3	2.8	
Maximum	0.8777	48	3.8	31.2	12.7	

(\*) Germany: proportion of children in public centers in the former Federal Republic in 1994

A = Index of fiscal discrimination in personal income tax (prepared by the author)  
 B = Proportion of children under 3 receiving public care services. *Care in Europe 1998*, p. 27 (taken from Deven, Inglis, Moss, Petrie, 1997. Table I.I)

<sup>27</sup> European Commission (DG V/D/5): *Care in Europe*. Brussels, 1998, p. 35

B1= Social benefits for the family/children function (% GDP), 2001. European Commission. *European Social Protection Expenditure and Receipts. Data 1994-2002*, p 70. Luxemburg 2003

C = Proportion of elderly people receiving institutional and home care. OECE: *A caring World*. Paris 1999, pag.120

C1= Social benefits for elderly function (% GDP), 2001. *European Social Protection Expenditure and Receipts. Data 1994-2002*, p 79. Luxemburg 2003

Each column expresses the different values reached by the different variables in each country. The values are adjusted to a scale ranging from 0 (corresponding to the minimum value in each column) to 1 (maximum value in each column). The different values obtained for each country, included in Table I, were calculated by means of the following expression:

$$(V_i - \text{minimum}) / (\text{Maximum} - \text{minimum})$$

with  $V_i$  being the value of each of the variables obtained for each country  $P_i$ .  
In the particular case of the fiscal penalty index, we have taken

$$1 - (V_i - \text{minimum}) / (\text{Maximum} - \text{minimum})$$

in order to identify the maximum value  $V_i$  with the fiscal system least harmful to reconciliation, similarly to the rest of the variables considered in the index.

**TABLE I**

<u>Country (Pi)</u>	<u>F</u>	<u>N</u>	<u>N1</u>	<u>M</u>	<u>M1</u>
Sweden	1.0000	0.6739	0.7273	0.5412	0.8788
Finland	1.0000	0.4130	0.7576	1.0000	0.5354
United Kingdom	0.9205	0.0000	0.3939	0.5305	0.8586
Italy	0.6688	0.0870	0.1515	0.0000	1.0000
Denmark	0.6538	1.0000	1.0000	0.6953	0.8182
Germany*	0.5358	0.0043	0.7576	0.1685	0.9091
Austria	0.5356	0.0217	0.7273	0.1577	0.8586
Belgium	0.4618	0.6087	0.5152	0.2401	0.6061
Portugal	0.4366	0.2174	0.2121	0.1147	0.5354
France	0.3926	0.4565	0.6667	0.2401	0.8081
Spain	0.3762	0.0000	0.0000	0.0179	0.5556
Ireland	0.0000	0.0000	0.4848	0.1685	0.0000

(\*) Germany: proportion of children in public centers in the former Federal Republic in 1994

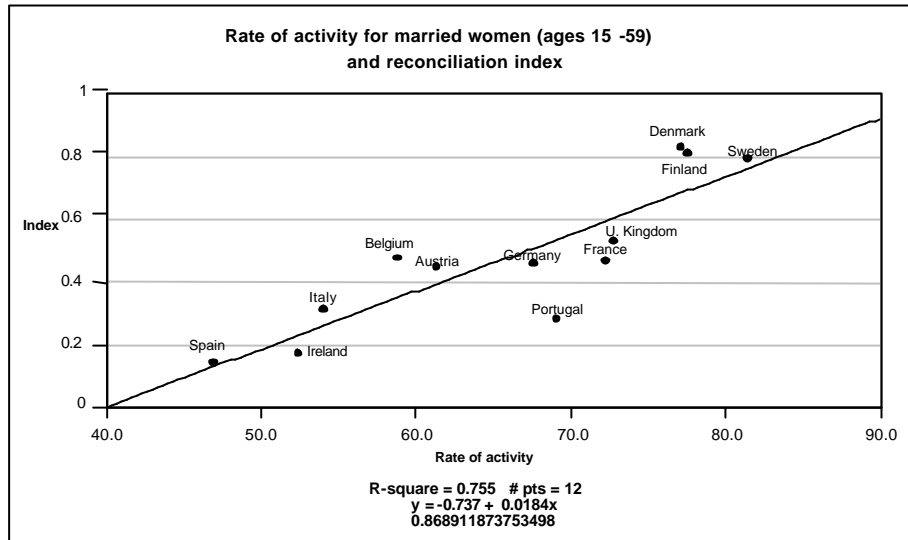
The different values in the table above are weighed differently (as indicated in each column heading) in order to achieve the reconciliation composite index:

	<b>Fiscal Penalty Index</b>	<b>Child care</b>		<b>Elderly care</b>		<b>Reconciliation index</b>
		<b>% coverage</b>	<b>Pub. Expendit.</b>	<b>% coverage</b>	<b>Pub. Expendit.</b>	
	<b>6/16</b>	<b>3/16</b>	<b>3/16</b>	<b>2/16</b>	<b>2/16</b>	
	<b>F</b>	<b>N</b>	<b>N1</b>	<b>M</b>	<b>M1</b>	
Sweden	0.3750	0.1264	0.1364	0.0677	0.0909	0.7963
Finland	0.3750	0.0774	0.1420	0.1250	0.0947	0.8142
United Kingdom	0.3452	0.0000	0.0739	0.0663	0.0492	0.5346
Italy	0.2508	0.0163	0.0284	0.0000	0.0189	0.3145
Denmark	0.2452	0.1875	0.1875	0.0869	0.1250	0.8321
Germany*	0.2009	0.0008	0.1420	0.0211	0.0947	0.4596
Austria	0.2009	0.0041	0.1364	0.0197	0.0909	0.4519
Belgium	0.1732	0.1141	0.0966	0.0300	0.0644	0.4783

Portugal	0.1637	0.0408	0.0398	0.0143	0.0265	0.2851
France	0.1472	0.0856	0.1250	0.0300	0.0833	0.4712
Spain	0.1411	0.0000	0.0000	0.0022	0.0000	0.1433
Ireland	0.0000	0.0000	0.0909	0.0211	0.0606	0.1726

Source: Prepared by the author

The following graph shows the high correlation (0.8689) existing between the reconciliation index and the rate of activity for married women in the European Union (the analysis includes 13 countries):



<u>Country</u>	<u>Married women Rate of activity</u>	<u>Index</u>
Sweden	81.5	0.7963
Finland	77.6	0.8142
United Kingdom	72.7	0.5346
Italy	54.0	0.3145
Denmark	77.1	0.8321
Germany	67.6	0.4596
Austria	61.3	0.4519
Belgium	58.8	0.4783
Portugal	69.1	0.2851
France	72.2	0.4712
Spain	46.9	0.1433
Ireland	52.4	0.1726

Determination coefficient,  $R^2 = 0.7550$

Correlation = 0.8689

Determination coefficient  $R^2$  is the square of the correlation obtained, and it shows what proportion of the dependent variable (rate of activity for married women) is explained by the independent variable (reconciliation index).

## Conclusions

Labor statistics confirm the female participation in the labor market is quite different from male participation in all the European Union countries, except for Nordic countries. Women's incorporation into the active life is influenced by their lifespan; men join the labor market once they reach the legal age required or once they graduate, and they stay in it until the age of retirement; women frequently quit as a result of marriage, birth and child care, and sometimes re-enter the market once this stage of their life is over.

Therefore, I believe it is important to establish a difference between women's entry into the workforce considering their marital status and the number of children in their care, which most of the times are not identified in men's work decisions. Thus, the rate of activity for married European women is below 60% (47% in Spain) compared to 84.4% in the case of married men (87.7% in Spain); in addition, 39% of married women work part-time, while only 3.7% of married men have this type of work shifts. Women between the ages of 20 and 34 with children under 2 have a rate of activity of 57.2%, while the male rate for the same age range is 96.4%.

The tax equity principle assumes individuals must pay taxes based on their economic capacity. If this does not take place within the family, that is because fiscal discrimination exists against one member of the family unit. The fiscal penalty –or excess tax- faced by the second receiver attempts to show and quantify its existence to assess the degree of discrimination in personal income tax existing in each country. This penalty would be determined by the difference between the rate paid by the second receiver and the one he/she should pay in case of paying taxes either personally or individually.

From this perspective, the analysis of tax systems prevailing in the European Union highlights the fact that joint taxes, in any of their multiple forms (*splitting*, family quotient, accumulation...), generate an effect affecting second income receivers in families that influences their decisions when it comes to staying (or not) in the labor market or increasing their participation in it, which openly violates the principle of efficiency. The equity principle is also violated upon choosing this type of tax, because it leads to clear indirect discrimination against married women (second female receivers), as reported by the European Commission in 1981.

The graphs on these pages show the excess tax rate paid by the second receiver (measured with respect to the rate paid through individual taxes). They also show the fiscal system penalizing the second receiver the most is that of cumulative taxes, followed by the German splitting and, to a lesser extent, the French family quotient, as a result of the higher tax faced by the taxpayer who is single and has no family burdens.

Sweden and Finland are among the countries that have chosen compulsory individual taxes, with strictly individualized systems not considering any transfer between spouses, which means they do not interfere with the second receiver's available income. By contrast, the remaining systems alter that income, to one extent or another, by allowing the transfer of deductions and reductions between both of them, that is, the use of related fiscal rights.

The index explained here, which measures the fiscal penalty to the second receiver (based on a quantification of the excess tax applied to this taxpayer compared to individual taxes) allows for a comparison of the level of discrimination in the different personal taxes. Its application to the different countries in the European Union confirms the above-mentioned conclusions, since the highest figures correspond to Ireland with 0.8777 (optional between accumulation, *splitting* and individual) and Spain, with 0.5475 (optional between accumulation and individual), followed by France with 0.5331 (family quotient). By contrast, the countries with the lowest indices are Sweden (individual) and Finland (individual).

If we compare the data on the rates of activity for married women, we can see that the countries with the highest fiscal discrimination indices (Ireland and Spain) are the ones also showing the lowest rates of activity for married women. By comparison, those with the



lowest indices (Finland, Sweden and Denmark) have higher rates of activity, close to 85%, with a correlation coefficient of -0.6895 between both variables.

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## **CHILDCARE AND GENDER BUDGETS: PUBLIC POLICIES AND OUTCOMES IN CANADA AND BEYOND**

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Universal access to high quality child care is critical to gender and class equality. In today's presentation, I will highlight some of the conceptual, historical and political dimensions of childcare, laying out how and why childcare plays such a pivotal role in women's equality. Yet having declared that childcare is centrally important, there are also some qualifications to be explored. I want to make some observations about the complex and double-edged nature of childcare. I do so to set up the preconditions under which childcare is a progressive, rather than a coercive, public policy and social service.

My comments on childcare, public policy and outcomes focus on Canada and similar liberal welfare regimes. I recognize that some of my generalizations will be inappropriate to other countries and other arrangements (O'Connor *et al.*, 1999). By way of a caution from Canada, you should know we are moving agonizingly slowly on child care. One of the presenters this morning was kind enough to say that Canada has a very good reputation when it comes to women and children, but there is a huge gap in our country between what we wish we had and what we actually live with on the ground. This grows clear from the finances: a universal child care system would cost Canada perhaps \$11 billion/year yet we spend less than \$1 billion/year (Friendly & Rothman, 2000).

### **The Context of Childcare and 'Reconciliation'**

Canada and similar countries confront some shared challenges which shape childcare debates and possibilities. One challenge is the shift to post industrial economies. As shorthand, we can consider this a shift from better to worse jobs, in the context of an increasingly cleaved labour market, the decline of the family wage, the rise of contingent and part time work and a growing emphasis on 'flexibility.' Concurrently in many European countries (and also in Canada, although to a lesser degree), economic restructuring is accompanied by ageing populations and immigration issues. All countries, however, confront the demographic shift of lower birth rates and increased numbers of lone-parent households. We see, too, widespread change in gender regimes. Most obviously, changing gender regimes are associated with high rates of female labour force participation, including high rates of maternal employment, and growing numbers of two-earner households. In Canada, about 72% of mothers are in the labour force and employment rates are higher for mothers with partners than for lone mothers.

These economic and demographic shifts combine with a moment which could narrowly be called the "fiscal crisis of the welfare state." More fully, the political environment includes rethinking the rights of citizenship. New political and fiscal realities have authorized changes in spending, such that across most provinces in Canada, there has been a redefinition of single mothers as 'employable' and a loss of their right to be on social assistance while their children are young. Political discourse today in Canada and in other liberal developed nations, revolves around notions of responsabilization, a trend to retreat from social redistribution in favour of individual responsibility. This has particularly harmful effects for very poor women, who experience the coercive dimensions of welfare-to-work policies.

The final conjunctural element is globalization of social policy, through transnational and supranational bodies, as well as through economic policies such as free trade. Canada was

recently on the end of an OECD visit as part of Organization's work on early childhood development, and we received some very fine advice that has assisted childcare policy development. More often, globalized policy and fast policy transfer isn't so well received or wanted, and I'll return to this point later in my talk.

On this skeleton of social, political, and economic arrangements, the concept of 'reconciliation' has appeared. I want to point to some of the problems with reconciliation. In the English world we say "reconciliation" more often than *conciliation*, but I have been pondering the use of conciliation today and I would appreciate a discussion of what the different language might denote.

Reconciliation flags the 'reconciling' of carework (paradigmatically seen as women's work) to the demands of production (paradigmatically seen as men's work). What generally happens in most talk about reconciliation are efforts to adapt women (and particularly mothers) to a labour market which remains virtually unchanged. Under the guise of 'reconciliation,' there are few efforts policies or programs actively trying to make men's lives more like women's. So, in practice -- despite the equity inflections of those who designed the concept -- it tends to represent the adjusting of women to male-stream labour markets. Moreover, 'reconciliation' is generally presented as an advance over prior arrangements, as a progressive development and an element of new family-friendly arrangements.

The centre-piece of reconciliation, so defined, is the promotion of women's paid employment, and for this, universal childcare is a precondition. How, then, is carework organized under reconciliation? What frequently occurs are policies to 'make work pay,' and to create more parity between men's and women's life course by making women's life course more like traditional men's life course.

By contrast, we could imagine 'reconciliation' operating differently. It could -- really, *should* -- be the centerpiece of what Nancy Fraser has called a 'universal caregiver' model (Fraser, 1997). In a universal caregiver model, both women and men are conceived of as care providers. But such a system would require significant investments. To compensate carework, as well as waged work (what an earlier generation called 'wages for housework'), such allowances must be equivalent to a breadwinner wage -- and these costs are politically resisted in liberal welfare states. As Fraser notes, only a 'universal caregiver' model breaks down the notions of breadwinning and caregiving as separate roles, coded masculine and feminine respectively. Only when women and men are equally seen as wage earners and care providers would men's 'free care ride' be eliminated, since men of all classes shirk carework and domestic labour, enjoying more leisure time than women who work the 'double-shift' of paid work and unpaid domestic care. Genuine gender equality can only exist under conditions that enable both parents (in two-parent households) to combine breadwinning and caregiving

Thus, we arrive at the Janus-face of childcare. In its coercive aspect, childcare services become a vehicle to compel women to adapt to a male-stream labour market, while continuing their asymmetric domestic burden of care responsibility. Yet, there is also the redistributive potential in childcare services. In its equity aspect, childcare broadens and collectivizes the social responsibility of the care of children, enabling both women and men to equally share in wage-earning and caregiving

It should be clear that I advocate childcare in order to redistribute carework, to socially recognize and value care of children, and to support reduce or eliminate gender inequalities in the distribution between women and men of paid and domestic responsibilities. Simultaneously, I urge us to be mindful of the coercive dimension of reconciliation and associated services. This is the dark face that underwrites 'workfare' -- the withdrawal of social assistance to parents of young children, and their redefinition as employable (and hence, ineligible for state support). It is also the approach to childcare service that is in play by those jurisdictions that do not prioritize high over low quality childcare, and are indifferent to whether or not childcare is provided by public, non-profit

or commercial facilities. If all that is needed is that children receive custodial care, then training and pedagogy is unimportant, and early childhood educators do not deserve professional-level wages and working conditions.

Thus, it matters very much *how* child care operates, the conditions under which it is delivered, and the policies that underwrite it.

### **Historical Considerations**

Historically, childcare has been defined out of the realm of politics: it was the very hallmark of that which was private. Caring for children has been widely and deeply understood to be a private family responsibility. More precisely, childcare historically (and still today) is seen as the responsibility of mothers.

Where out-of-home-childcare did arise, at least in Canada, the US, England and Australia, it was created by the charitable sector. Nursery services were premised on maternalism. Early founders of creches and nurseries sought to create services for women who were forced into the market by virtue of economic desperation. In this model, maternal employment was a grave problem, but was less a mortal sin than allowing one's family to starve, or one's children to be seized by social workers. The preferred option was to restore conditions that would enable women to leave paid employment, and so relinquish their claim to needing childcare. Paradoxically, early Canadian, American, Australian and British childcare providers had the very distinct desire to do their organizations out of existence (Brennan, 1998; Riley, 1987; Rose, 1999; Schultz, 1978).

Such residues of maternalism and opposition to maternal employment eventually found their way into modern welfare states -- most notably into provisions that deserving single mothers of ought to qualify for 'pensions,' and be exempted from paid work whilst their children were young. We can argue, too, that the residue of maternalism and ambivalence to maternal employment inform paid parental/maternity leaves (Benoit, 2000). Recently, this dimension of the social contract has been revised: mothers of young children have been redefined as employable across both Canada and the US, and there has been a push to either return women, or get women, into the labour market. The challenge is that low paying and non-standard jobs (and, particularly in the US, loss of benefits such as health and dental care) typically mean that leaving welfare rarely pays: thus, the 'welfare to work wall' -- and a raft of programs designed to hoist mothers over it.

Against the generally understood model of expanding entitlements in the postwar welfare state, with new citizenship rights and entitlements -- childcare was one of the first casualties. While childcare was a wartime provision in many nations, it was not incorporated into universal and normative public postwar programs and policies in Canada, the US, the UK, or Australia. The necessity for poor and single mothers, particularly widows, to work was accepted but there was no sense that child care was a good thing for mothers, a good thing for children or ought to be permanent. Childcare was based on supplicant principles, means testing and targeting.

So, for the last half-century, childcare services have been provided privately -- by the for-profit private sector of entrepreneurs who operate commercial childcare facilities, or the not-for-profit voluntary sector. One rarely-observed dysfunction of this community-based third-sector model (which in Canada provides about 80% of the nation's centre-based spaces) is that time-crunched parents must design, develop, fund, operate and oversee their non-profit board of directors if they are to have childcare services to use.

This history of childcare's institutional grounding in the charitable sector has left profound political legacies. It has meant that child care has largely been absent from post war welfare states. The post war welfare state has assumed that children would care for themselves or their mothers would care for them, that the citizen who needed to be met by the new welfare state was a male citizen-worker or a female unpaid caregiver. This meant, of course, that state spending and public budgeting could largely disregard the care needs of children,

relying on families and other private arrangements.

Further, we see in Canada, and other liberal welfare states, a cleavage of childcare from education, certainly from education for under-sixes. We spend in Canada about \$42 billion/year on public education from Kindergarten to University; we spend less than \$1 billion/year on child care and the ratios of those spending tell you something about the public acceptance of education and the lack of acceptance of childcare.

### **Who is Childcare For?**

When this history and political positioning are grasped, it becomes easy to see why childcare is so under-developed in Canada and elsewhere. Yet, surprisingly, childcare has come under close and highly contested scrutiny from a number of quarters in recent years.

A major force in this new interest has come from developmental science. In North America, we've witnessed an increased political attention to childcare under the guise of new brain science arguments. Such arguments stress the importance of the early years (usually 0 - 3, but often 0 - 6), and have highlighted the neurological dimensions of childcare. A key text in this has been an authoritative publication, *From Neurons to Neighbourhoods*, whose title succinctly captures much of the interest (Shonkoff & Phillips, 2000). "Brain science" has, interestingly, brought new and influential stakeholders to advocate for more childcare. I am quite dubious of these claims and of the politics that motivate them, but I acknowledge that they have an influence on current politicians and on current choices. In Canada, recently, 'brain science' arguments have been part of a confluence of influences that have generated new policy and proposals to increase public funds.

Another strong and compelling argument for childcare draws on child development claims that early learning and care improves child outcomes. The evidence base here is quite strong, particularly for the positive development associated with children marginalized by poverty. For example, the relatively easy-to-measure degree of 'school-readiness' correlates with good childcare, and seems to be strongly linked to greater school success and lower drop out rates. Children with developmental delays can be identified and supported earlier, contributing again to positive outcomes. One risk with this line, is that it leads quite directly to promotion of targeted over universal services. A second problem with the 'better outcomes' approach is that it prioritizes the child's future productivity over the child as citizen in the here and now. In positioning today's children only as tomorrow's workers, children's needs as child-citizens are disregarded. The advantage is that this thread affiliates closely with the well-established social mandate to 'educate' children. In this model, though, there isn't necessarily a need to simultaneously accommodate parental employment -- hence a range of half-day, or part-time 'child development' or early childhood initiatives can and are being argued to be commensurate with childcare.

A third line of argument is advanced by the 'business case.' Arguments from economists about the value of 'investing in children' often synthesize neuroscience and development outcomes to claim that new dollars spent on the early years will generate the most positive returns on investment. Typical justifications are modeled along the lines of economic returns, for example,

*Early childhood development programs are rarely portrayed as economic development initiatives...and this is a mistake. Such programs often appear at the bottom of economic development lists. They should be at the top. Studies find that well-focused investments in early childhood development yield high public as well as private returns (Rolnick & Grunewald, 2003).*

In policy debates, gender and social equity arguments are less powerful than the three preceding 'brain science,' 'better outcomes' or 'business case' paradigms. Good pedagogy, which is a blend of both care and education, supports social solidarity and social cohesion. It contributes positively to children's development and education, while supporting parents (including parental employment). As Rianne Mahon has argued in her

review of the OECD and its ambivalent reconciliation agenda, “for gender and generational equality and social justice, the child-centred vision needs to be incorporated into a broader strategy for ‘sharing’ work and family life” (Mahon, 2005)

Underlying arguments for and against childcare are assumptions that the ‘client’ of childcare is, variously, the child, the mother, the family, or the employer. When child care is conceived of as an equity issue for children, one set of (unsatisfactory) services becomes authorized. When it is seen as merely being a service for employers, or for only poor and disadvantaged families, we see very different sets of (also unsatisfactory) child care arrangements. It is only the epistemic community advancing gender and social justice which simultaneously advocates that that childcare is equally for parents/mothers and children -- both a mothers’ right and a child’s interest, to borrow Sonya Michel’s evocative phrase (Michel, 1999)

### **Childcare Delivery in Liberal Regimes**

Canada, like other Anglo-American liberal regimes, relies primarily on the informal sector to provide care. The vast majority of children who need non-parental care in Canada get it in the grey market: there are no regulations, no standards, no quality, no training, no tax receipts, no employment standards in the informal sector of relative-care, neighbour-care, and self-care. Less than 15 percent of Canada’s children has access to regulated, licensed childcare (Friendly & Beach, 2005)

The numbers make this clear. Canada has approximately 750,000 licensed child care spaces to serve its 4.8 million children aged 0-12 years (Friendly & Beach, 2005, Tables 4, 9 and 10). About 80 percent of centre spaces are non-profit, delivered through the voluntary sector mainly in the form of community-based, parent-run boards. Only a small portion of Canada’s non-profit centre spaces are publicly operated, generally by municipalities (primarily in Ontario) or school boards (such as Quebec’s school-age programs) (Doherty *et al.*, 2003, p. 28). Canada relies on non-profit organizations and privately owned businesses to provide most of its child care services. Reliance on these non-state providers is not the norm among the countries that have developed child care systems that delivery high quality universal programs.

Four-fifths of Canada’s spaces are provided by the third or voluntary sector. Both as cause and consequence of this, Canada has a very limited public role. The state (through provinces and territories) ensures minimum safety, minimum standards of health, minimal training requirements, and minimum standards. Parent-run voluntary sector services provide most of the spaces, and parent fees provide the bulk of the sector’s funds. In Canada, as in all liberal regimes, child care is a user-fee service. The political assumption is: ‘you had your children; if you want child care, you should pay for it.’ For very low-income children (always well-below Canada’s unofficial poverty line) there are partial fee subsidies. On the whole, what we see in Canada are services provided by the market and paid for by parents, with very minimal public support. The result is severe fragmentation and a patchwork of wildly varying quality, availability and affordability (OECD, 2004). This would seem to generate pressure for urgent political reform

However, under North American Free Trade Agreement (NAFTA) and World Trade Organization (WTO) rules, the potential for public management and reform of childcare grows less likely, rather than more certain. Social services are bound by international trade rules. The only exemption under NAFTA are services established or maintained for a “public purpose” – and child care is specifically mentioned under his list. Under US interpretations, child care provided by private companies would not be considered a social service established for a ‘public purpose.’ Trade rulings are bindable and enforceable, and they accord foreign investors a virtually unqualified and unilateral right to claim damages. Under NAFTA, governments are limited in their ability to impose consumer-dominated boards of directors, to circumscribe the for-profit sector, and to specify any other measure or regulations that is ‘more burdensome than necessary.’ According to one legal opinion, the General Agreement on Trade in Services (GATS) Agreement of the World Trade

Organization “would seriously limit if not prevent Canada from establishing an early childhood education and care program as a public service” (Shrybman, 2004).

To sum up, delivery of childcare services is provided by a small regulated child care sector. Most public funding is on the demand side, as money goes to parents rather than to investments in services. Spending through the tax system, for example, greatly exceeds spending directly on programs.

A logical outcome of such a setup is privatization. In Canada, for-profit childcare provides about one-fifth of the country’s centre-based spaces. There are numerous reasons to be concerned about for-profit childcare (Prentice, 2005).

The research evidence on commercial (for-profit) childcare is clear: it is overwhelmingly associated with lower quality of care for children, poorer wages and working conditions for staff, is badly distributed by neighbourhood (rarely entering low-income communities, since operators must rely on parent fees to make the service profitable), and the active rejection of children with expensive special needs, including the rejection of children with disabilities. Where for-profit childcare predominates, there is very little infant care (since infant care is expensive), little extended hours care, few rural or remote services -- all the while skimming public funds, where they have been made available, in the accumulation of privately held assets that may be kept, and do not need to be returned if an owner closes down a privately held centre. Commercial child care tends to be a poor quality for children, much worse quality for staff who earn lower wages and poor pedagogy for children.

### **Gender Based Analysis, Gender Budgets and Childcare**

So what would this mean if we were to think about child care, gender based analysis and public budgets? First, currently, there is a markedly gender inequitable allocation of public resources in our budgets. This gender inequity occurs despite Canada’s many international human rights commitments. I have mentioned the high rate of mother’s employment and the fact that Canadian women still experience an earning gap (Statistics Canada, 2006). Single mothers and their children experience very high poverty rates. These realities have not yet been fundamentally accepted by politicians, decision makers and our budgeters. Canada does not yet have gender responsive budgets at either the national or sub-national levels.

Childcare is highly compromised by access, by affordability and by quality -- and these challenge affect the families and children lucky enough to already be in the very small regulated sector. So if we want gender responsive public budgets, we would need to think about the challenges of moving what has formerly been an ‘off the books’ service into the public sector. This would, at a minimum, require a paradigm shift from demand-side to supply-side funding.

Childcare is very bitterly contested in Canada. It tends to be fought over politically as though it were a private luxury consumption, rather than a public good. Childcare advocates, feminists and labour activists have thus far largely been unsuccessful in changing the terms of public debate so that childcare is seen as an important investment. As mentioned earlier, where investment thought has been taken up, it tends to be in the narrow productivist way that tells us children are important to invest in today because they will be future producers tomorrow -- not because they have rights now and certainly not because their mothers have entitlements.

As a result, gender and generational equity issues remain contested and in flux. Where social movement activists have been able to make some gains has been around economic arguments. Among childcare advocates, the ‘business case’ framework is emerging as a key hook. One well-known Canadian research study has relied on cost-benefit analysis, showing that \$2 of return flows from every \$1 spent on childcare (Cleveland & Krashinsky, 1998). This and related figures, and their logic, has helped to make progress over the past half-decade.



When done for redistributive reasons, good childcare contributes to civil society, to equity (gender, class and generation) and is particularly important for poverty reduction for women. Good childcare, done well, is an important contributor to social cohesion and social inclusion, life long learning and the sorts of early childhood experiences that help minimize marginalization. When done right, childcare has the capacity to be a lynchpin service that would help us build caring communities. In Nancy Fraser's vision, childcare services help us "to imagine a social world in which citizen's lives integrate wage earning, caregiving, community activism, political participation, and involvement in the associational life of civil society -- while also leaving time for some fun" (Fraser, 1994, p. 62).

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**SESSION 2:**

**GENDER, FAMILY AND THE LABOR MARKET IN LATIN  
AMERICA AND THE CARIBBEAN**

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## DOMESTIC STRUCTURES, FAMILY CYCLES AND INFORMAL NETWORKS FOR THE RECONCILIATION OF THE PRODUCTIVE AND REPRODUCTIVE SPHERES

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*Our bus stops from time to time. It's just that somebody wants to get off the bus. If the person getting off is a young woman with one or two children (childless women are an oddity), the sight before our eyes will be one full of charm and agility. First, the woman will tie the infant to her back with her percale shawl (the child, deeply asleep all the time, does not react). She will then squat down and place her inseparable earthenware bowl or basin, filled with all sorts of foods and other products, on her head. She will then straighten up, with a movement similar to those of a tightrope walker taking the first step on a tightrope; swaying, she finally regains balance. She grabs the sleeping mat with the left hand and leads the second child with the right one. And, thus, walking with light and rhythmic steps, she heads towards a path surrounded by bushes, a path leading to a world I am not acquainted with that I may never understand.*

Ryszard Kapuscinski, Ebony

### Introduction

The recognition of tensions between work and the family –the productive and reproductive spheres- is not new. In the early 1980s, Jelín and Fejoó (1981) suggested the existence of cross-pressures between women's reproductive tasks and the activities they perform to increase, though meagerly, income in their domestic groups. The incompatibility between reproductive and productive work has been one of the factors that has helped us explain the ups and downs of women's presence in the sphere of paid labor, as well as the high concentration of women in self-employed activities and in those that, despite involving the payment of a salary, are performed within households (García, Muñoz and Oliveira 1982, González de la Rocha 1986, Benería and Roldán 1987). Changes taking place since the year in which Jelín y Fejoó wrote about this subject have not eased tensions but, on the contrary, have increased them.

In effect, women's participation in labor markets increased significantly all throughout the Latin American region, particularly in the 1980s, when the economic crisis forced women to increase their labor participation in an attempt to make up for the losses caused by the deterioration of male income and, thus, mitigate the damage caused to poor domestic economies by the crisis (González de la Rocha 1988, García and Oliveira 1994).

Within the framework of reconciliation policies, and based on the need to design public policies aimed at solving tensions and countering the reproduction of gender inequalities (Ariza and Oliveira 2004), it is appealing to think that social networks help reconcile the pressures women must undergo in their multiple roles as workers and care providers in the domestic sphere. There is no doubt anthropologic studies conducted in the 1970s and 1980s documented the huge advantage of using social networks (among other mechanisms) to survive in a hostile economic environment through reciprocal supports that contributed to reconciling the increasing pressures experienced by women. Thus, co-resident daughters freed their mothers from domestic work so these could join the ranks of salaried work. Neighbors became babysitters, and other women in the network were able to provide information on better jobs and supports to solve everyday problems and emergencies (Lomnitz 1975, González de la Rocha 1986, 1994).

We can not deny female labor participation has increased, although at different paces, throughout Latin America. A recent study, however, shows women's labor participation is still weak, particularly if we compare Latin American women to women in other regions in the world, as only 52% of them are income generators and support their family economies (Schkolnik 2004). The fact that women in Latin America have joined the ranks of salaried workers, basically in the informal sector, has not freed them from the reproductive tasks they have traditionally been in charge of. In Mexico, the country this article focuses on, one can not explain the survival of low-income domestic groups (both rural and urban) without considering women's efforts to act not only in the reproductive sphere and as income generators, but also to support their families and transform them into units benefiting from social policy programs. Women have had to evolve into tightrope walkers trying to achieve some balance in settings characterized by risk conditions produced and perpetuated by poverty. Poor women living in Mexican cities, towns and settlements work hard in exchange for a salary and, on their own, produce consumer goods; take care of children, the elderly and the sick; perform most domestic activities (household *chores*) and must fulfill the joint responsibilities of social policy programs.<sup>28</sup>

The starting point for this article is the premise that the increase in extra-domestic activities, in addition to the permanence of traditional reproductive tasks, produces growing tensions between the productive and reproductive spheres (González de la Rocha and Escobar 2002, Escobar and González de la Rocha 2003, Ariza and Oliveira 2004, Schkolnik 2004), and here we suggest that, although such tensions have increased, it is not correct to assume the existence and permanence of social networks as instruments for the reconciliation of demands in those spheres. We suggest that, paradoxically, at a time where those reconciliation mechanisms are needed the most, many women and men are facing the deterioration of their social networks. The erosion of social exchange, of the individual and domestic capabilities to establish and maintain social relationships and take advantage of resources flowing through these networks, is part of the spiral of disadvantages (González de la Rocha 2000, 2001, González de la Rocha *et al.* 2004, González de la Rocha and Villa Gómez 2005 and in the press). These can be caused by different factors: on one hand, the reduction and deterioration of actual well-being assets and resources and, on the other, the processes of aging and disease.<sup>29</sup> The social isolation emerging in these processes as a result and a cause at the same time opposes the idea of reconciliation via the use of networks. From this perspective, it can be affirmed there are signs of a *crisis in the reconciliation* between the cross-pressures resulting from the productive and the reproductive that can lead to a major crisis in the field of the political economy of mutual supports and care.

The ideas outlined in this paper are part of a deeper reflection resulting from a long research process. Studies on domestic groups as scenarios of survival, as well as those conducted to assess the impact of economic crises and structural adjustment on households, were key elements in describing and explaining the importance of social exchange through horizontal and reciprocal networks of relationships and the crucial role of women in the political economy of mutual supports and care. Subsequent analyses revealed the perverse association between increased poverty and social isolation (González de la Rocha 2000, 2001). Recent research, on the other hand, provided an opportunity to further the knowledge about the factors and processes leading to social isolation situations.<sup>30</sup> The purpose of this paper is to show, in the light of recent evidence, that women's cross-

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<sup>28</sup> It has been suggested that social policy programs have been designed based on the traditional family pattern, which is clearly obsolete, where women are only caregivers and service providers for their families (Schkolnik 2004, Molyneux 2005, González de la Rocha 2005).

<sup>29</sup> The idea of the spiral resulted from empirical observations on the increasing and cumulative effects of the erosion of work (more limited family and individual capabilities to generate income via paid work; fewer possibilities to carry out activities on their own) in spheres other than that of work and, specifically, on the establishment and maintenance of reciprocal support social relationships. The image of the spiral represents the helical (and non-rectilinear) nature of this process, where social isolation (the output) increases the intensity of the force behind it (individuals have fewer contacts to get jobs and other types of resources).

<sup>30</sup> I refer to the project *Aislamiento social en contextos urbanos* ("Social isolation in urban contexts"), led by Mercedes González de la Rocha and funded by the Vice Ministry of Planning, Evaluation and Prospective Studies of the Ministry of Social Development, which was implemented in 2004.

pressures between paid work and domestic work have increased and there are situations and contexts where social networks no longer reconcile those pressures. In this regard, I have included a section addressing the changes experienced by domestic groups in the last few years, followed by another discussing social support networks. Finally, the conclusions summarize the key points of this reflection.

### **Domestic groups**

Domestic groups -mostly shaped by affinity and consanguinity kinship ties- have been conceived as survival and reproduction scenarios. Most of the research on families and domestic groups conducted in the past, both in urban and rural contexts, has developed the idea of the family as a social institution capable of meeting the needs (in terms of material things, affectivity or support) of the individuals making it up.

In the 1980s, studies on the social organization of low-income domestic groups suggested that, in spite of their internal inequalities, they are scenarios for the implementation of the so-called *survival strategies*, which were so popular a couple of decades ago. These studies highlighted the participation of adult women -which is crucial to the reproduction of domestic groups-, and the “help” from young women and female children in reproductive tasks, as well as those aimed at generating income. Thus, mothers have been the ones responsible for reproductive work combined, if necessary, with paid work or self-employment. Many studies, on the other hand, highlighted the fact that female children and young women absorb significant domestic workloads -taking care of household chores- so that mothers are freed from those tasks and can generate income with fewer pressures. In this regard, we can say that it is in domestic groups where this type of organization between mothers and daughters takes place. Even if the latter are too young or they are children, women are the ones in charge of reconciling incompatibilities between the productive and reproductive spheres (Oliveira). It can also be suggested that reconciliation attempts are private (in the absence of suitable public policies) and women are the ones dealing with it through a female division of labor. We also affirm here that the relationship between the public and the private, the productive and the reproductive, is not only conflictive for adult women (in terms of incompatibilities of work schedules, responsibilities and cross-pressures), but also for female children and young women, and increasingly (as explained below) for elderly women. The complement to this approach is a methodological statement: the need to bear in mind, in the analyses of reconciliation policies and the social mechanisms actually implemented to reduce the clash between work and the household, the variable including age and/or generation, in addition to gender.

The most significant changes experienced by households in Mexico are more evident in urban areas and can be summarized as follows: in terms of domestic structure, although nuclear homes are still a majority (70.8% in urban areas in 2002), their proportion has declined as other types have increased. In fact, the proportion of one-person households has increased in urban areas (from 4.6% in 1989 to 6.5% in 2002), and the same has happened with childless nuclear households (from 6.3 to 8.3% in the same period). Extended and single-parent nuclear domestic groups with female heads of households increased from 6.4 to 9.4% in urban areas in the above-mentioned period, and the proportion of nuclear and extended households headed by females is close to 24% (see Arriagada 2004 for an analysis of changes in the structure of households and their transit through the domestic cycle stages for Latin America -changes in the proportion of young and older households in different moments in contemporary history- and Ariza and Oliveria 2004 for Mexico). According to the authors consulted, this is the result of century-old trends in demographic change and changes resulting from socio-economic processes. The size of domestic groups is now smaller than it was several decades ago, and the same applies to the percentage of households in full expansion in the domestic cycle. By contrast, the proportion of households in more advanced stages of the domestic-reproductive cycle has increased significantly: domestic groups in the expansion stage declined in terms of percentage points from 21.4 to 19.1 between 1989 and 2002. On the other hand, those in the consolidation stage also reduced their presence, from 41.7 to 35.9%, while older

households (in the fission or *exit* stage) increased dramatically in the same period, from 13.8 to 23.1% (data for Mexico, urban areas, taken from Ariza and Oliveira, op. cit.).

These processes have a clear effect on the composition of households and the implications those changes may have in private attempts to reconcile women's paid activities and their reproductive workloads. In context like the Mexican one, where the solution of tensions between the productive and the familiar has been left in the hands of the persons experiencing them (particularly women), the difference in the capacity to confront and "solve" cross-pressures will depend on the capacities of individuals, which are shaped by different domestic-family environments. In other words, by way of hypothesis, we suggest that there are some domestic scenarios (different types of household depending on their structure, composition, and domestic cycle) that are more appropriate for a successful solution than others. First, it is necessary to point out that, although there is a smaller number of children to care for, feed, educate and attend to in case of disease (respiratory and intestinal diseases, as well as "infant" viral epidemics such as chicken pox, mumps, etc.), the presence of elderly people increases. The larger number of elderly people is often associated with a larger number of sick individuals, in this case, victims of chronic diseases. Health care expenses (payment of doctor's fees and purchase of drugs) can be high enough to throw the members of those households into poverty. Furthermore, diseases affecting the elderly population increase the burden of care provided at home (mostly by women). A study completed in December 2005 (Escobar, González de la Rocha y Cortés 2005) documented the processes and factors leading to high-vulnerability situations. That analysis led to the construction of three domestic scenarios characterized by a very high level of vulnerability:

- 1) Households in advanced stages of the domestic cycle where we find a combination of aging and disease processes, high health-related expenses and income-generating capacity deterioration processes.
- 2) Young domestic groups in a full stage of expansion, the main characteristic of which is the imbalance between those members with an income-generating capacity and their dependants in different contexts, particularly those characterized by a lack of well-paid jobs.
- 3) Domestic groups made up of two generations, grandparents and grandchildren, without the presence of the members of the previous generation (a situation occurring particularly in rural communities with high levels of migration of the workforce resulting from the lack of local work options). In this third scenario, the vulnerability characteristics of the two other scenarios converge, precisely due to the presence of elderly people, on one hand, and dependant children and young people, on the other, without representatives of the generation in the middle (the so-called *doughnut* households).

The reconciliation of cross-pressures becomes more complex in each of these scenarios. Not all elderly women have stopped being responsible for socializing new generations. The responsibility of providing care (services, domestic work) to their grandchildren, just like in *doughnut* households, falls on them. This happens in a context of deteriorating income-generating capacities (at best, they get remittances from their absent children), and deteriorating health and physical conditions. On the other hand, young households, although with fewer children compared to households in the past, are the typical spaces where domestic and labor demands must be confronted. The decline in fertility has encouraged women's entry into labor markets; however, they have not freed themselves from the burden of care for dependant members because, although they currently have fewer children to care for, they are being increasingly required to care for the elderly (co-resident or not). Nevertheless, there are cases where the family no longer represents the unending source of support documented in the bibliography. Women who must divide their time between paid work, their domestic workloads, and the care and socialization of their offspring, for example, do not always have the resources (including time) to care for the elderly. Or those women who, in an effort to generate income, leave their young children at



home, locked up. Or those who, as a result of the need to fulfill the joint responsibilities of a social program, are forced to leave pending household chores or lose one-day's salary because they failed to complete tasks. In all these cases, the existence of several adult women (which is the case in large domestic groups, for example) can be a factor to encourage private reconciliation arrangements. Also, receiving support from solid networks of social relationships between women with kinship ties, or neighbors brought together by physical and social proximity and, particularly, by trust and the certainty they will be reciprocated, is a crucial active in solving these conflicts. However, as already pointed out in this text and as will be explained in the following section, reflections aimed at designing public reconciliation policies must not count on these resources as allies they can always trust.

### **Social Networks**

Social networks have been perceived as the solution to adversity in contexts of poverty both in Mexico and Latin America. Social relationships established between individuals and domestic groups (along with the family) are described in bibliography on the subject as buffering the impacts of poverty, crises and, in general, the economic change resulting from changes in labor and income, changes in agricultural production capabilities and, in general, transformations in the material foundations of the everyday life of the members of a society.

Social relationships, particularly those built on the basis of trust and reciprocity, have been a topic receiving a lot of attention in anthropology and substantivist economy (Mauss 1966, Polanyi 1968, Lomnitz 1975). In spite of some differences that have emerged in bibliography on the subject, there is a relative consensus around networks as the social web, an analytical abstraction made up of individuals related to each other, where resources flow. Social and material resources can be mobilized via mechanisms and responses based on individuals, the family or broader social groups (associations, organizations, communities) for the solution of everyday and extraordinary problems, and also in reciprocal exchanges that are part of economic transactions embedded in social structures and dynamics (Polanyi 1968). In his research on the forms of survival of the urban poor, Lomnitz (1975) documented the importance of reciprocity and trust for social exchange in the context of the urban Mexico of the 1970s. For Lomnitz, reciprocity is a particular form of exchange that differs from the market exchange and is linked to the existence of social fields or networks that translate into economic structures that maximize security in a context characterized by economic insecurity. It is there, in the core of these networks, where goods and services flow reciprocally. Trust, on the other hand, is an ingredient of social exchange based on the capacity to establish a relationship of reciprocity and the willingness to fulfill the obligations implicit in that relationship. In the analysis by this author we can find two of the elements that would later provide guidelines for the construction of the concept of social capital.<sup>31</sup> Reciprocity networks, according to Lomnitz, offer the possibility of using social resources not only as survival mechanisms, but also for production purposes (the mobilization of resources in social relations in Bourdieu). Trust is both a requirement and part of the networks' construction process (trust in the observance and enforcement of cultural rules as a component of social capital in Putnam).

Access to social relationship networks and the exchanges within them, on the other hand, are shaped by gender and kinship rules (Pessar 1999). Networks, as suggested by authors such as Portes and others, are both inclusive and exclusive, and gender differences play an important role in them. Studies on the social networks of Mexicans migrating to the United States show the differential construction of male and female networks (Hondagneu-Sotelo 1992, 1994; Pessar *op. cit.*). Other research has shown the existence of different networks that men and women, members of the same households, construct with different means and objectives (González de la Rocha 1994).

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<sup>31</sup> The concept of *social capital* has not been addressed in this paper. For a discussion of this concept in the framework of social programs to fight poverty, see González de la Rocha 2005.

Thus, the counterparts of poverty and the economic crises reproducing and magnifying it seem to be the solidarity, cohesion, reciprocity, support and trust that nourish poor men and women's social networks. In theory, social networks play a crucial role in the private arrangements to reconcile the cross-pressures resulting from work and the family, the production and generation of income and reproduction. However, here I suggest that reflection on the processes and mechanisms to reconcile the productive and reproductive spheres, as well as that for the design of public policies aimed at that reconciliation, can not rely on an overly enthusiastic emphasis on social networks as solving mechanisms and as a *natural, inherent and always existing* component of the poor's portfolio of resources.

In different regions in Mexico and other countries there is empirical evidence of the situations, contexts and processes that lead to a loss of solidarity, reciprocity and support between neighbors, relatives and *compadres*. Bearing in mind increasing economic and social pressures give rise –among other phenomena– to the premature separation of the members of domestic groups and the declining cooperation between the members of a family (González de la Rocha 2000, 2003), we can not rely on the premise of the permanent existence of networks as the accomplices of survival (which is the way they have always been understood) or the reconciliation of private and public tensions. The uncritical (naive) use of these ideas (the always existing networks operating as buffers) entails the danger of overlooking the contexts, situations and processes where the erosion and deterioration of social exchange relationships (horizontal and support) predominate over the emergence of social support networks (González de la Rocha 2000, 2001, 2003). Recognizing the limits of the poor's resources and “strategies” has led to a criticism of theoretical approaches, such as that of survival strategies, because they are limited in terms of explaining the situations and contexts (precariousness and labor exclusion, unemployment) associated to processes of deterioration in networks, the atomization of domestic groups and increasing social isolation (for an analysis of the impact of unemployment on the atomization of nuclear families and the social web of a working-class neighborhood, see Bazán 1999). It is worth asking ourselves about the implications of these processes for reflections on social networks as *reconciliation* mechanisms. The traditional position emphasizing support between women to perform the tasks demanded from them by the family and society would respond that, in effect, social networks are reconciliation mechanisms. But analyses on social isolation contexts and situations, which are the basis for this reflection, affirm that reconciliation is ineffective.

Different studies have shown the fragmentation (in some cases incipient and in others more widespread) of social life, segmentation processes (particularly in cities) and social isolation (see ethnographic studies by Bazán 1998, 1999 and González de la Rocha 2000, for Mexico, and Auyero 2000 and Feijoo 2001, for Argentina). In the past, the cases of social isolation were considered *deviant*, as atypical cases in a context where most low-income domestic groups were scenarios of emerging strong social relationships. Recent studies, however, show that social isolation is currently a much more common phenomenon, as it affects a larger number of cases. Loneliness, which is the result of the deterioration of social relationships, is no longer atypical, although this is not a trait that can be generalized. The lack of actual support for the solution of everyday and extraordinary problems is a phenomenon the seriousness of which becomes evident upon confirming the benefits of social support networks when these flourish in social and economic contexts encouraging them.

The capacity to build social relationships, far from being natural, is constructed and, regardless of what we may desire, is not unlimited. It is crucial to know the factors and processes that form part of the spiral of disadvantages the result and cause of which is isolation. The objective of the project *Aislamiento social en contextos urbanos*, mentioned in the introduction to this text, was to identify these factors and processes. First of all, as documented in other texts (González de la Rocha 2000, 2001), labor exclusion and precariousness are elements that unleash processes of accumulation of disadvantages, one of which is social isolation. However, there are other less-known factors and processes that can also unleash these spirals and lead to the deterioration of the capacities to establish and/or maintain social relationships with those with whom, otherwise, a reciprocal

exchange of supports would exist. This research discovered new and different elements of social isolation overlooked by specialized bibliography. Aging, often linked to chronic diseases, emerged as a crucial factor to understand social isolation situations. Another critical stage in the life of individuals, that of youth, which is associated with drug use, is also a stage –in the particular situation of drug use– that leads to the breaking of family ties and links to institutions. The processes of impoverishment and estrangement (social and economic between the parties in a relationship), as documented by Lomnitz (1975) in the 1970s, are also elements that explain social isolation situations and the processes of breaking (or weakening) of social relationships that used to be solid in the past (González de la Rocha and Villagómez 2005, and in the press).

Even though the above-mentioned research was not designed to identify cross-pressures and their potential solutions (reconciliation), case studies can serve as guidelines for the reflection on the reconciliation of tensions between the productive and the reproductive. Despite the many questions still unanswered that only *ad-hoc* research may be able to answer, we can suggest the hypothesis on the difficulties of implementing arrangements to reconcile the forces emerging from the productive and reproductive spheres, income-generating work and the household. The individuals and families falling in the different classifications of social isolation (those excluded from the labor market or entering it in precarious conditions with social networks weakened as a result of not having the resources to nourish them; the sick and the elderly; the victims of impoverishment processes with highly limited social relationships; young people trying to quit drugs, who reject their peer groups, the family and other institutions and are rejected by these, and live alone in one-person households) do not have solid and active social networks buffering those pressures. In fact, the counterfactuals supporting this hypothesis are the women that, in that same research, have steady jobs with benefits, are part of domestic groups where we find support and supportive family arrangements for the carrying out of domestic tasks and child care (particularly between mothers and daughters, or between co-resident sisters-in-law), and are also part of solid social constellations where different goods and services flow (information about jobs, support to get them, child care while mothers are at the workplace, etc.).

## Conclusions

If women continue to increase their presence in the labor market and young women and female children do the same in school (as a result sought by some social programs such as *Oportunidades*), who is left to reconcile cross-pressures in a context like the Mexican one, where men do not have an active participation in the production of services and goods consumed in the household?

New domestic configurations have emerged from the experimentation and implementation of social arrangements that are more suitable to give a solution, at least partially, to the multiple complexities of domestic life. From the discussion in this text we can point to a possible answer to the question made in the former paragraph: grandmothers (see also Escobar 1999). In effect, the results of recent research by a group of anthropologists of *CIESAS Occidente* have shown the emergence of new forms of household and family organization. Specifically, the so-called *doughnut households*, made up of a grandmother –or both grandparents– and their grandchildren, without the presence of the generation between them: that of the children/parents (Escobar Latapí, González de la Rocha and Cortés 2005). This domestic arrangement can be a solution to the reconciliation of cross-pressures in those cases where absent figures (the children's parents) are the household's actual breadwinners. The absent breadwinning parents must not face the domestic and reproductive pressures involved in the everyday raising of the children, and grandmothers are not subjected (provided they limit themselves to receiving remittances) to the pressures of the labor market. Thus, *doughnut* households reconcile pressures through a form of social organization that has chosen to geographically separate work in the household (where the workers' children live). Obviously, this is a temporary private arrangement mostly involving elderly women (tired and worn out) as the ones in charge of providing care for the generation of children and young people. Once this arrangement is no longer functional

(when grandmothers get sick or once they die) mothers become, once again, the center of cross-pressures until another private solution, usually an agreement between women, is set in motion.

The most evident conclusion of this reflection is that social networks actually function as buffers to domestic and productive pressures. However, future public policies designed to reconcile the clash of pressures emerging from work and the household can not rely on the premise that there are already private and social arrangements that participate in reconciliation tasks. What I have suggested here is that there are contexts where that premise is not only naive, but false. But there are other reasons for the design of public policies independent from the private arrangements that women have put in practice. Young women have the right to decide to continue their education instead of continuing to *reconcile* domestic pressures so their mothers can make a salary. Adult women, overloaded with work, may find themselves in the need to no longer participate in social support networks because they simply lack the resources, either material or in terms of time or energy, to be part of a mutual relationship of support. Grandmothers, toothless and worn out by life, teach us that, regardless of their age, women are willing to take care of domestic burdens, whether their own or someone else's. But the question still remaining is, until when?

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## **GENDER AND FAMILY-WORK RECONCILIATION: LABOR LEGISLATION AND MALE SUBJECTIVITIES IN LATIN AMERICA**

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### **Introduction**

One of the pillars that have characterized the social construction of male and female identities in modern societies has been the prevalence of a sexual division of labor matrix assigning adult males the responsibility of providing family income and women the obligations of reproduction in the domestic world, including childcare and childraising. Over the course of the last few decades, this model has been altered by changes in family structures and dynamics, an increasing female participation in the paid labor market, the flexibilization of work conditions, the educational advancement of women, changes in the direction of social policy, and demographic, legal and cultural changes. Multiple factors have affected the "man provider/woman housewife" social organization model that, at the same time, has led to a redefinition of economic provision patterns in households and the denaturalization of some of the structuring in social gender relations.

In Latin America, the rate of "domestic activity" among female spouses, understood as the percentage of the female population whose main occupation is that of household tasks, has declined almost by 20% in less than ten years, from 53% in 1994 to 44.3% in 2002 (ECLAC, 2004). In Argentina, data for the metropolitan region of Buenos Aires shows that the "dual breadwinner" model, where both members of the adult couple work and generate income to meet household needs, has virtually doubled over a 20-year period, from 25.5% of the households in 1980 to 45.3% in 2000 (Wainerman, 2003). On the other hand, the percentage of households headed by women has increased in almost all the countries in the region and also in the different social strata, a fact that has also increased the proportion of families where women are the only income-generators (ECLAC, 2004).

This transformation incorporates an old problem of the feminist agenda into the current public debate: how to reconcile the responsibilities of family life with those of the paid work sphere?<sup>32</sup> This concern has spread to different contemporary societies. But while a significant part of European social policy has already focused the discussion on the reconciliation of family and work life, understanding it as a specific public policy issue (Ellingsaeter, 1999; Crompton, 1999), these debates are only incipient in Latin America, and they almost always focus on the sphere of policies targeted at women.

In this paper I will analyze the structuring of the family-work reconciliation in labor legislation and male subjectivities. The central question on how to reconcile the responsibilities of production and reproduction will be addressed on two levels: 1) what are the institutional mechanisms available to facilitate the reconciliation of these responsibilities?, and 2) who is the subject of reconciliation in these institutions and contemporary male representations?

Thinking about reconciling productive and reproductive work in Latin America involves particular biases. First of all, because the increase in female participation in the sphere of

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<sup>32</sup> This question has been present for more than two decades in the research on the way in which responsibilities are distributed between men and women in families and the labor world, with a strong emphasis on the focus on women (see, among others, Jelin and Feijoó, 1980). At present it has acquired a new meaning as a result of new approaches attempting a joint interpretation of family and work life (Crompton, 1999; Wainerman, 2003; Ariza and de Oliveira, 2003 among others).

paid work took place within the framework of deep economic and institutional transformations produced by neoliberal policies that restricted social protection systems and expanded labor flexibility, which increased the levels of work informality and precariousness, social and economic inequality, and the persistence of high levels of poverty in the region (ECLAC, 2004). A particularly relevant fact in this regard is that only 50% of the working women in the region participate in the formal sector of the economy (Valenzuela, 2004). It is worth mentioning that only a portion of the total number of female workers are able to associate their participation in the paid market with some of the rights facilitating the reconciliation of work and family responsibilities.

Second, because in Latin America, the “cradle of machismo” (Valdés and Olavarria, 1998), traditional social representations of the differential responsibilities of men and women regarding domestic work and childraising still persist to a large extent. And this not only filters family contracts for the distribution of care activities and childraising, but also the public policy targeted at the world of work and families.

Several authors have affirmed that there is a close relationship between the orientation of state policies -particularly with regard to the role played by the market and the responsibilities assigned to families- and the shaping of gender identities (Creighton, 1999; Esping-Andersen, 1996 y 2002; Folbre, 1994, Sainsbury, 1999, among others).

Research on unemployment, on the other hand, has also shown the existing link between public policy and social representations. Benoit-Guilbot (1994, in Kessler, 1999) pointed out, for example, that even though the level of female unemployment is higher than that among males in almost all Europe, the rate is even higher in those countries where the level of female participation is lower (like Spain and Italy). In these countries, the “hegemonic attitude of giving priority to male employment” is visible both in public programs and among employers. Likewise, collective representations influence the decision of giving priority to the use of adult or young males. Again, countries like Spain and Italy are less tolerant of unemployment of the elderly and more open to the late incorporation of young people, whereas in others, like Germany and the Netherlands, priority is given to young people’s entry into the workforce to the detriment of the elderly. In both examples, certain types of social structuring, this permeates social representations and translates into different public policies.

From this perspective, it is interesting to consider both the way in which social institutions encourage the structuring or maintenance of a given matrix of care and provision responsibilities by gender, and the representations of this structuring developed by individuals.

In this article I will attempt to prove that, in Latin America, both in institutions regulating the family-work reconciliation and social representations, *the subject of reconciliation is not a neutral individual, but “a female” individual*. Affirming that the subject of reconciliation is not “neutral” is platitudinous to some extent. An individual seldom is. Nevertheless, when it comes to the reconciliation of family and work responsibilities, it is particularly interesting to see the way the institutional scaffolding develops among women, transforming them into the priority subject of reconciliation responsibilities and rights. Thus, it not only encourages the prevalence of an almost retrograde domestic care model, but also encourages practices hindering the demand for female work in the formal market by linking the costs of childcare permits and services exclusively to the hiring of women.

My point is that while policies aimed at the reconciliation of family and work responsibilities basically focus on women, they will hardly lead to sustainable and significant achievements in the transformation of gender inequalities<sup>33</sup>, both in the sphere of the employment market and the sphere of reproduction. Furthermore, I consider the failure to consider the analysis

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<sup>33</sup> By “gender” I will understand the social and cultural construction organizing notions of the “inherent” in the masculine and the feminine based on the sexual difference (Lamas, 1996). I consider the concept involves definitions that encompass both the individual sphere (including subjectivity, the construction of identities and the meaning assigned to bodies by culture), and the social and institutional sphere (which influences the division of labor, resource distribution and the recognition and protection of men and women’s rights).



of men and the way male subjectivities are created both institutionally and symbolically not only contributes to perpetuating the invisibility of the men as "gendered" individuals, but also reinforces the fact of keeping them in a position of privilege in the order of social gender relations (Connell, 1987 and 1995; Kimmel, 1997).

I will refer, in the first place, to the regulation of work relations as one first attempt to reconcile family and work. To that end, I will introduce part of the results of a research project developed for ECLAC's Women and Development Unit, within the framework of the ECLAC-GTZ project "Labor Policies with a gender approach", along with Laura Pautassi and Natalia Gherardi (2004), where we highlighted and analyzed labor legislation in six Latin American countries (Argentina, Chile, Costa Rica, Ecuador, El Salvador and Uruguay).<sup>34</sup> A new analysis of that data will allow me to summarize the way in which those regulations contribute to the structuring of gender identities and highlight the representation of the masculinities present in those institutions.

Second, I will do a brief analysis of the representations different men have with respect to their own position and that of women in the work sphere and family life. To this end, I will share some results of two studies conducted in different contexts. Since they do not have a common methodology, they must not be taken as empirical evidence of my hypotheses, but only as examples. On one hand, I will use discourses found in workshops held with Colombian male public officers (in the cities of Bello and Bogotá)<sup>35</sup>. On the other, I will explain some of the preliminary results of an analysis of 31 in-depth interviews with men from popular and middle-income sectors in Buenos Aires' Metropolitan Area.<sup>36</sup> I will make an attempt to introduce the exploration of male representations of the work and family world as a field still requiring further analysis, but without which other attempts made to promote reconciliation policies will always be incomplete.

Is it possible to develop forms of reconciliation between family and work life that are equitable in terms of gender, without structuring a new "sexual contract"? (Pateman, 1995). This is the question driving me to start this analysis. In the following pages I will try to contribute by pointing out some of the multiple dimensions that should be considered to answer it.

## **I. Family-work reconciliation in labor legislation<sup>37</sup>**

The regulation of paid work was the first attempt to reconcile family responsibilities and women's entry into the labor world. This regulation was very specific in terms of gender, distributing right and responsibilities to men and women in a differentiated fashion.

One of the first Conventions of the ILO (Convention No. 3 of 1919) established rules regarding maternity leaves and the protection of pregnant women's work. This, which was a breakthrough in terms of social rights, also established a particular way of protecting women's labor rights. The recognition of female work was directly related to their reproductive capacity and its protection. And the subsequent expansion of these rights has never questioned the *subject* thereof, thus leaving, to some extent, the responsibility of the social reproduction function in the hands of women.

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<sup>34</sup> See Pautassi, Laura, Eleonor Faur and Natalia Gherardi (2004) *Legislación laboral en seis países latinoamericanos. Avances y omisiones para una mayor equidad*, Santiago de Chile, CEPAL, Unidad Mujer y Desarrollo, Serie Mujer y Desarrollo, N° 56.

<sup>35</sup> These workshops were held in 1998 and 1999. Three events were held with the participation of approximately eighty local public officers and technicians linked to non-government organizations with a high level of education (high school and university in general). These workshops were aimed at encouraging reflection, from a male perspective, on the way gender inequalities are structured in different scenarios of social life. They allowed the exchange of ideas and interesting discussions among participants. Their *in extenso* systematization was published in Faur, 2004.

<sup>36</sup> These interviews were held with employed and unemployed adults from different social and educational backgrounds, between 2002 and 2003. Their analysis is still in a preliminary stage, as it is part of more extensive research. In this paper I will share some preliminary observations.

<sup>37</sup> The information and a significant part of the analysis introduced in this paragraph are based on a study conducted for ECLAC's Women and Development Unit, in the framework of the CEPAL/GTZ project on "Labor Policies with a gender approach", published in Pautassi, Laura; Faur, Eleonor, and Gherardi, Natalia (op. cit.).

Labor legislation supported this foundational notion around women's work by focusing on the regulation of mechanisms allowing the combination of work and child care, or by "protecting women" from night work. In the meantime, other perspectives linked to the family-work reconciliation, understood as the recognition of a more extensive group of responsibilities linked to the sphere of reproduction, would be almost completely set apart from these regulations.

In 1981, ILO's Convention N° 156, which made reference to equal treatment and opportunities for workers with "family responsibilities", represented a new achievement in the international scene. At least two innovations can be found in that instrument: 1) the subject of rights in this Convention are not only women, but also working men with family responsibilities; and 2) the Convention expands the notion of family responsibilities, recognizing that both children and other family members require specific care. The ratification of this Convention is not that widespread yet; it only has 36 ratifications on an international level, and nine in Latin America. On the other hand, its provisions have not permeated labor legislation in Latin America. For the time being, the canon of reconciliation policies present in legal frameworks in Latin America is that of mitigating the collision between income and the presence of women in the world of paid work, reproduction and newborn care.

As pointed out by Ellingsaeter (1999: 41), public policies that tend to harmonize family and work usually offer three types of mechanisms: "time to provide care, money to provide care and child care services". An analysis of Latin American labor legislation shows that none of these mechanisms is equally distributed among workers, and the main differences found are based on gender belonging or the type of work done by women, which is significantly permeated by their socioeconomic status.

The analysis of this legislation reveals a particular way of symbolizing and structuring social gender relations and identities. As affirmed along with Pautassi and Gherardi (2004: 36): "...while labor regulations are based on the "male" assumption of a "male worker" model, the recognition of women as workers is not dissociated from their position as mothers."

Thus, men used to receive "family allowances", money transfers for male workers with a legally constituted family, under the assumption that they are the ones responsible for the role of providing for the household. Meanwhile, working women were granted a different type of rights related to: a) employment protection during pregnancy and puerperium; b) maternity leaves, and c) the availability of child care services at the workplace.<sup>38</sup>

Argentina, Chile, Costa Rica, Ecuador, El Salvador and Uruguay show differences and similarities in the way in which labor legislation protects these rights. Legislation in all of the different countries analyzed includes provisions regarding dismissals of pregnant women without grounds and maternity leaves. Some (not all) also refer to the obligation to provide childcare services at the workplace. As will be seen, it becomes evident that, through these institutional mechanisms, references to family care responsibilities focused almost exclusively on women. Labor legislation was a reflection of social relations prevailing, but also a form of reproducing the cultural patterns of distribution of care responsibilities and resources between men and women.

### **Employment protection during pregnancy (and pregnancy protection at work)**

As far as the gestation period is concerned, there are two different mechanisms present in the legal frameworks analyzed. One first reference has to do with protecting pregnant women's employment by preventing dismissals without grounds by employers. Some legislation also prohibits jobs putting the health of women or the fetus at risk.

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<sup>38</sup> It is interesting to point out that, while resources transferred via family allocations depended on the legal legitimacy of family bonds, maternity-related rights were not exclusively associated with married women; they were based on the link between mother and children.

The regulation of the “maternal privilege” (the protection from dismissal) is found in legislations in Argentina, Chile, Costa Rica, Ecuador, El Salvador and Uruguay, although the applicability and scope of this right are highly variable. The type of sanctions applied to employers violating this right also varies.

More specifically, in Chile this maternal privilege extends throughout a woman’s pregnancy and up to one year after the end of the maternity leave (that is, up to fifteen months after the delivery); in Argentina the working woman’s job is protected for up to seven months and a half after the delivery; in Costa Rica protection from dismissal extends “throughout the lactation period”, although the length is not specified, and in Ecuador and El Salvador the protection only applies until the end of the post-natal rest period. In Uruguay the maternal privilege covers a period not specified by the law, but jurisprudence has pointed out that the protection period must be of 6 months as of women’s return to work.<sup>39</sup>

The second mechanism found in the different legal texts analyzed relates to women’s health and pregnancy protection in the work sphere. Thus, Chile, El Salvador and Uruguay prohibit work that may hinder the good development of pregnancy, while in Costa Rica the prohibition to carry out “dangerous or unhealthy” activities extends to all working women, whether pregnant or not; an unpleasant aftertaste of the “protectionist” paradigm for women that took priority in employment policies over a large part of the 20<sup>th</sup> century.

Now well, an important exception to this protective rule is found in legislation on domestic service (one of the priority branches of activity for poor women in Latin America). In this case, employment protection during pregnancy is virtually inexistent. On one hand, because it is an activity usually carried out in conditions of informality, thus excluding female workers from access to labor rights. But also because there is legislation, like that in Ecuador, that explicitly states the exception of the maternal privilege for female domestic servants<sup>40</sup>. Other laws, like that in Argentina, include a special provision to regulate domestic service but lack this mechanism<sup>41</sup>. And others, like that in El Salvador, states that contracts for female domestic servants can be verbal, thus leaving the definition of the rules regulating the work relationship at the employer’s discretion.<sup>42</sup> These considerations openly violate the principles of equality and non-discrimination that the constitutions in the countries analyzed recognize in their texts.

Another worrying aspect is that of finding that the differential treatment in the regulation of the maternal privilege focuses precisely on the most disadvantaged women in the social scale and, consequently, on those in need of better equal opportunity mechanisms. This discrimination reflects the way in which class and gender belonging are shaped, through institutions that do not always assist in reducing disadvantages, and often do nothing but reinforce them.

Everything pointed out so far shows that labor legislation in the Latin American countries analyzed has incorporated, though only to a certain extent, the principles of employment protection during pregnancy stated in ILO’s Convention No. 3, protection from the risk of dismissal for women in that situation. However, this did not happen equally or universally, and this deficit particularly resounds in the context of work flexibilization and precariousness in the region. Thus, the maternal privilege only operates in the case of female employees in the formal sector of economy, and in several countries it excludes female domestic servants, which clearly represents a discriminatory restriction of rights.

While the maternal privilege is a benefit justifiably limited to working women, it is also interesting to see the form of distribution of other rights related to family care responsibilities that, hypothetically, could promote men and women’s joint responsibility

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<sup>39</sup> See Pautassi, Faur and Gherardi, op.cit.

<sup>40</sup> Labor Code, Title III, chapter I.

<sup>41</sup> Decree No. 326/56 of 1956.

<sup>42</sup> Labor Code, Arts. 71 and 76.

through the availability of child care time and services. In the following pages I will refer to paternity and maternity leaves and the provision of childcare services and areas.

### **Maternity and paternity leaves**

Maternity and paternity leaves are based on the recognition of the fact that after birth or adoption, time is required to care for the baby, the mother's physical recovery and the establishment of the parent-children relationship. In effect, childcare requires time, and leaves are designed to guarantee both the employment and the income of workers during a period of time where responsibilities in the productive sphere are suspended.

The legislation in the six countries analyzed provides for *maternity* leaves, with some variations as to the duration of the leave (which ranges from 12 weeks, in the cases of Argentina, Ecuador, El Salvador and Uruguay, to 18 weeks in Costa Rica and 4 months in Chile).

By comparison, *paternity* leaves only have a minimum expression in the legislation analyzed. Three of the six countries (Costa Rica, Ecuador and El Salvador) completely lack paternity leaves. Argentina has a two-day leave, while Uruguay has three-day leaves exclusively limited to government employees; there, it is also established that the same will be granted only if "required" by the worker.

Uruguayan Law 17.292 (25/1/2001) recently recognized the right to a special leave for six continuous weeks for dependant workers adopting, or legalizing the adoption of, one or more minors. It is highly positive to find this license for Uruguayan parents. The odd thing is that, at present, adopting parents have longer leaves than those with biological children, something rather absurd in the regulation of these benefits.

The case of Chile deserves special attention. Until 2005, fathers only had a one-day leave. This leave was extended, and in August 2005 four extra days were added through a law that states the following:

*"Without prejudice to the provisions of article 66, the father will be entitled to a four-day paid leave in case of birth of a child, which he may use at his discretion either as of the time of the delivery, in which case continuous days will be applied, or distributed within the first month as of the date of birth. This leave shall also be granted to the father adopting a child, counted as of the corresponding final decision. This right can not be waived. (Law No. 20.047. Sole article).*

On the other hand, Chile provides another type of additional protection to parents of children "requiring home care due to serious disease". In these cases, leaves can cover up to one year after the birth of a child and up to 10 days a year in case of serious disease in children under 18. The law also states that this leave can be used by the mother or the father, at the mother's choice.<sup>43</sup> Another characteristic of the Chilean legislation is that it states that, in case the mother dies, both the leave and the protection from dismissal is transferred to the father, which reflects some efforts –though still incipient– to democratize family responsibilities between men and women.

### **Table 1**

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<sup>43</sup> Art. 199 of the Labor Code.

**Maternity and paternity leaves in six Latin American countries<sup>44</sup>**

	<b>Mother</b>	<b>Father</b>	<b>Comments</b>
<b>Argentina</b>	90 days	2 days	Project to extend paternity leaves to 15 days
<b>Chile</b>	18 weeks (126 days)	5 days	Up to 1 year for the mother or the father (at the mother's choice) if the child has a serious disease
<b>Costa Rica</b>	4 months (120 days)	-	Project to extend paternity leaves to 15 days
<b>Ecuador</b>	12 weeks (84 days)	-	-
<b>El Salvador</b>	12 weeks (84 days)	-	Leave of 2-15 days a year "to fulfill family obligations rationally demanding the worker's presence" It does not make reference to childbirth, but disease or death of a relative.
<b>Uruguay</b>	12 weeks (84 days)	3 days for biological fathers and 6 weeks (42 days) for adopting fathers	Leave for biological fathers limited to the public sector in case it is "required".

**Source:** Prepared by the author based on Pautassi, Faur and Gherardi (2004)

The different cases analyzed would seem to indicate that, as far as parental leaves are concerned, the current perspective is linked to the protection of "biological motherhood", that is, protection during the gestation period, delivery and lactation, and clearly for women/mothers (Ellingsaeter, 1999). There are only a few rules regarding care for older children, and there are not enough of them encouraging the involvement of fathers in this type of tasks (Pautassi, Faur, Gherardi, op.cit.).

Nobody denies there are biological reasons for the adoption of leaves for women after they have given birth to a child. Therefore, it is legitimate to base these leaves on the recognition that women need a certain time for physical recovery after a delivery and, at the same time, to facilitate breastfeeding. However, childcare for small children involves a series of activities that can be carried out by both men and women and, clearly, do not end by the third month of a baby's life. From this perspective, it would be desirable to have longer parental leaves in general, and paternity leaves in particular. Somehow, a different approach is required to overcome the "biological" perspective, "politicize" maternity and paternity, and move towards a significant extension of leaves for care and their democratization between the genders.

Now well, while maternity leaves come hand in hand with labor rights -and, consequently, with women's entry into the formal market- and not the group of rights linked to citizenship - and therefore extendable to the overall population-, women's broad participation in the informal sector, as well as the lack of continuity in the time of leaves for male and female workers in the formal sector, means that many families must find private strategies in order to stay in the labor market. Thus, reconciliation strategies are often left in the hands of families or women, who must hire childcare services in the market or get them via community or family support networks.

In the Latin American case, the paradox is that middle-class women often rely on the hiring of female domestic workers who, as already explained, perform household maintenance and childcare tasks in conditions of complete informality and with no protection of their rights (Pautassi, Faur y Gherardi, op.cit.). Thus, the societal matrix of care responsibilities transfers childcare to other women, but labor legislation itself deprives domestic service of the benefits of a work contract in several countries in the region.

These countries have leaned more heavily towards the definition of policies recognizing the validity of a dual-breadwinner family scheme, encourage a joint childcare model and

<sup>44</sup> The extension of leaves is expressed as stated in the corresponding legislations. The number of days appears in parentheses to make comparisons easier.

structure paternity leaves in very different forms. Sweden, for example, was the first country –in 1974- to grant both parents the right to take six-month leaves so they could have the time to care for their children, and since 1995 they have leaves of up to 15 months, with a one-month “quota” for each parent (Sundström and Duvander, 2002). The Norwegian model, on the other hand, also includes interconnected leaves for both parents, for a total of 52 weeks with 80% of the salary, or 42 weeks with full salary. In both cases, there is a “maternity quota” (3 weeks before and 6 weeks after birth) related to the protection of the biological aspects of motherhood. There is also a four-week “paternity quota” aimed at encouraging a greater involvement of males in childcare, which means it will be lost for both in case the father fails to take it. The rest of the time can be distributed indistinctly between the father and the mother, depending on their preferences. In addition, men and women have an annual ten-day leave (each) to care for sick children under 12 (Ellingsaeter, op.cit.).

In synthesis, the regulation of leaves in the different countries analyzed still shows a bias with respect to the differential distribution of responsibilities between men and women. Their leaves are relatively short compared to countries with higher well-being levels, and they focus almost exclusively on women. Even in those countries providing a certain level of benefits for men, it is clear that leaves are only granted to allow for a few days of paternal presence after birth, rather than being an incentive for male joint responsibilities in childcare. In addition, the legislation analyzed shows an increasing gap between women of different social strata and occupations, for example, in the case of informal female workers in general and those working in domestic service in particular.

**Childcare centers and childcare services**

The analysis of regulations to childcare centers and services also shows significant variations among the six countries analyzed. In three of them, regulations force employers to make childcare areas available depending on the number of female employees employed (around 20 women in the case of Chile and 50 women in the case of Argentina). Only one of the six cases analyzed, Ecuador, establishes childcare services must be made available if more than 50 workers are employed (regardless of their sex).

Meanwhile, labor legislation in El Salvador and Uruguay does not regulate care services for the children of workers protected by the law (although programs in that regard have been implemented El Salvador). In Costa Rica, on the other hand, a law has been approved to regulate the use of childcare centers (Law 7380) that translated into a public policy intended to be universal and, therefore, does not tie the availability of childcare services to having a job in the formal sector.

**Table 2**  
**Childcare services associated with entry into the formal labor market**

	<b>Applicability criteria</b>
<b>Argentina</b>	50 female employees
<b>Chile</b>	20 female employees
<b>Costa Rica</b>	Breastfeeding areas at the workplace: 30 female employees  Childcare centers as a policy independent from labor policy.
<b>Ecuador</b>	50 workers employed
<b>El Salvador</b>	-
<b>Uruguay</b>	-

Source: Prepared by the author based on Pautassi, Faur and Gherardi (2004)

The regulation of childcare centers linked to women’s employment is discriminatory from several standpoints: on one hand, the law takes for granted that the working *mother* will be the one going to the workplace with her child, and it does not grant male workers the same right. Furthermore, it allows the employer to hire a number of female workers lower than

that provided for by the law in order to avoid the extra burden of running a childcare area. Thus, it indirectly discourages the hiring of female workers.

On the other hand, the fact of linking childcare services to formal work is, again, an ineffective mechanism in Latin America where, as already explained, the proportion of working women in the formal sector is barely 50% for an average of 14 Latin American countries (Valenzuela, op.cit.). Of this percentage, the number of those working for companies or organizations with the size required to open childcare centers or areas is even smaller. This situation reflects the obstacles many families, particularly those in popular sectors, must face to get childcare services.

In summary, we can see the right to childcare services and state resources for childraising activities, recognized in international legal frameworks<sup>45</sup>, must go through a series of mediations in national regulations hindering families' access to said services.

### **Representations of masculinities present in labor legislation**

The analysis conducted here allows us to highlight the fact that the limited number of mechanisms existing in Latin American legislation to promote policies for the reconciliation of family and work life not only focus on women working in the formal sector, but also rely on notions of masculinity virtually unrelated to care for family members.

This can be confirmed in the legislation analyzed. None of the mechanisms to reconcile family and work responsibilities in it recognize or encourage the father's participation in child care, with rules similar to those applied to the mother, even though both childcare leaves and the availability of childcare centers for workers' children should be rights granted to both fathers and mothers in equal conditions.

Our analysis shows, however, that paternity leaves are minimal and not generalized. On the other hand, childcare centers are mostly associated with the workplace of women, not that of both workers. Bearing in mind that the likelihood of having a formal job is higher for males than it is for women, this provision is, to say the least, problematic, because it fails to give male workers the possibility of having an childcare area at their workplace, or their partners to have access to this resource in case their own workplace does not provide one. Thus, not only does this restrict a right significantly facilitating the reconciliation of productive and reproductive responsibilities for both workers, but also encourages employers to give priority to male workers as a result of the lower costs hypothetically involved in hiring them.

This structuring seems to be based on the representation of the male worker as a *subject with responsibilities related to income-provision, but not to care for other family members*. Since there are no "biological" arguments backing up this type of regulations, it is clear that these institutional mechanisms are the result of a particular form of "politicizing fatherhood" or, rather, not politicizing it in the context of the countries analyzed.

Meanwhile, some labor regulations still show a particular emphasis on males as the sole providers of the household income. The following provision in Costa Rican regulations is amazing:

*"In no case shall the Ministry of Labor and Social Security authorize contracts to work abroad for: (...) c) married men, if they fail to prove they have made the necessary arrangements to provide for their women and their legitimate or natural children, or if the contract does not state that a sum appropriate to this end to be remitted every month or paid here to said relatives will be deducted from his salary (...)"* (Costa Rica's Labor Code, Art. 43).

However, this provision, which is undoubtedly well-intentioned (securing men's financial responsibility for their families), lends itself to some questions: What was the assumption in

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<sup>45</sup> See the Convention to Eliminate All Forms of Discrimination Against Women (CEDAW), Article 11, and the Convention on the Rights of the Child, Article 18.

this case? That families can not be self-sustainable without men's contribution? That women continue to be full-time housewives? That women make less money than men and, therefore, their income and that of men must be balanced? We do not know; what is clear is that the image of men as the breadwinners remains almost intact in laws like this.

### **Change trends**

Coupled with some cultural changes celebrating the gradual involvement of males in raising their children, the subject of paternity leaves is beginning to become part of the public agenda. At present, in two of the six countries analyzed –Argentina and Costa Rica- there are bills to extend paternity leaves to 15 days, although they have not been passed.<sup>46</sup> Recently, two Argentine municipalities (Rosario and Morón) extended paternity leaves to 15 days, although these regulations, for the time being, are only applicable to municipal public employees.

As already explained, Chile also extended paternity leaves from one to five days, allowing men to use the leave within the first month of the biological or adopted child's life. They also grant special parental leaves during the first year of a child's life in case of serious disease.<sup>47</sup> Somehow, the “familialist” perspective of society and Chilean institutions, expressed in the first article of their political constitution<sup>48</sup>, also enables this type of mechanisms. Although the biggest responsibility is deeply rooted in the role of women, there is a gradual expansion of the institutionalism enabling males to get a little more involved in family life. We are apparently witnessing a certain sign of change, though weak and not yet based on the logic of joint responsibility of men and women with respect to family care responsibilities.

In the Latin American region, except for Uruguay and the adoption leaves mentioned in previous pages, the country with the longest paternity leave is Cuba, with 15 days. This makes you wonder if in this region –where we find a combination of shrinking state services, a strong concentration of capital and high levels of inequality, informality and precariousness- moving away from the market logic is a necessary condition to grant some social rights to workers.

### **Reconciliation from an institutional perspective**

The way in which public policies structure rights related to childcare not only assumes more or less respect for the rights of women, men and children in each country. It also favors the consolidation of different forms of reconciling family and work responsibilities, as well as specific gender relations dynamics (related to provision and care) within families. All this inevitably contributes to the creation or the reproduction of certain subjective traits in gender identities, both among women and men.

Labor legislation in the six countries analyzed (Argentina, Chile, Costa Rica, Ecuador, El Salvador and Uruguay) shows significant ties to a model of differential responsibilities for men and women, where men establish themselves as the providers of financial resources and women as those responsible for family care. Although it recognizes the existence of paid work by women, it shows a highly differential distribution of workers' rights and benefits, which also applies to female workers from different social classes (like domestic servants). Furthermore, labor legislation would seem to be based on a heterosexual family model with a complete conjugal core. And the set of social representations and provisions in

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<sup>46</sup> In Argentina, the project to extend paternity leaves was preliminarily approved in late 2003.

<sup>47</sup> In spite of the above-mentioned mechanisms made available to men by the law, these leaves are seldom used by the father. In 2001, over 117,000 women used this benefit, as opposed to only 19 men. The year with the highest number of leaves used by fathers was 1997, with a total of 92 (see Pautassi, Faur and Gherardi, 2004, with data from SERNAM; <http://linux.sernam.gov.cl>).

<sup>48</sup> Chile's political constitution states that: “the family is the fundamental core of society” and also that “it is the State's obligation (...) to protect the population and the family; foster the strengthening of the latter (...) and guarantee individuals' rights to participate in national life with equal opportunities” (Art. 1).



this legislation shows laws are a social and discursive practice, and not only a system of rules and regulations (Birgin, 2003).

The criteria followed by the different institutions analyzed associate childcare and child raising responsibilities with the biological processes of motherhood, rather than cultural constructions and, thus, perpetuate the assignment of responsibilities –and related rights– to the short period of time where pregnancy, delivery and puerperium take place.

Notwithstanding these cultural considerations, it is worth mentioning that, in practice, this development has not been complete in Latin American countries. On one hand, because it took place in the framework of limited or stratified “social states” (Filgueira, 2005) where, for example, sufficient childcare areas were never made available despite the existence of regulations in that regard. On the other hand, because these rights never applied to all or most working women (or men) in markets where informal work and self-employment are a historic constant.

A major change of approach would involve both the structuring of a new societal consensus and the creation of institutional incentives to effectively universalize the protection of rights related to work and family life in equal conditions for men and women. Therefore, guaranteeing these rights will involve, in some cases, the provision of free quality childcare public services, while in others an attempt must be made to increase the recognition of administrative rights, setting in motion the transfer of financial resources to both male and female workers to ensure the time necessary to care for their children and, hopefully, other members of their families.

As long as access to these rights is stratified in terms of linkage (or not) to the formal labor market, and it is segmented in terms of gender, the family-work reconciliation mechanisms will continue to shape gender identities and relations permeated by hierarchical patterns, not only between men and women, but also between women with different social backgrounds.

With this backdrop, in the following section I will review contemporary male representations of the family-work reconciliation. This analysis is an attempt to provide an approach supplementing the one developed so far, and also to propose new questions regarding the possible conditions to reconstruct the “sexual contract” that would seem to prevail in the assignment of rights and responsibilities between the genders, particularly when observation focuses on the world of domesticity and childraising.

## **II. Family-work reconciliation and male subjectivities**

So far, we have seen that labor policies in particular, and public policies in general, are not unknown to those representations referring to certain patterns of the sexual division of labor and overstating the “man provider-woman caregiver” seal or, at best, that of “dual breadwinner -female care”.

In general terms, we can relate the stakeholders’ effective possibilities of family-work reconciliation to at least three types of resources and situations: 1) institutional mechanisms available; 2) resources available to hire care services in the market, and 3) the form of organization of family contracts and the distribution of work and responsibilities among family members.

In this latter area, family negotiations take place in contexts permeated by the voices and perspectives of different stakeholders representing different levels of power, negotiation capacity and autonomy (Jelin, 1998; Di Marco, 2005; Arriagada, 2002). From this standpoint, the analysis of collective representations can become an input leading to an adjustment in the definition and implementation of public policies, based on the assumption that reconciliation requires women and men jointly participating in the productive and reproductive spheres. And also that, in order to achieve this common willingness, it will be necessary to achieve a more active encouragement of male participation through a set of labor, family and cultural policies aimed at achieving this objective.

In this section I will analyze several representations of contemporary men in their transit through the productive and reproductive sphere. I will attempt to introduce some of their images of women's work and identify their images of "reconciliation". I will also explore if this is a valid concept upon focusing on men. The interest of focusing the analysis on men is based on their indubitable intervention (by action or omission) in the everyday practices of the family-work reconciliation. It is worth emphasizing that none of the cases described below represent an attempt to generalize, as they are not representative. Also, they can not be compared to each other. I am simply introducing them as exploratory cases allowing us to identify some of the representations prevailing in contemporary male subjectivities.

### **Being a man is being a provider (and that is important)**

If the basis for labor legislation was the figure of the male full-time worker with a family "he is responsible for", that means this institutional structure must have permeated the way in which men perceive themselves in their role as providers, but not that much as caregivers. Since their rights as workers have to do more with what they provide to the family group (in terms of social security rights or resources), and barely nothing with what families might require from them in terms of care services or time, it is not surprising to find that this matrix of responsibilities is also present in male subjectivities.

The mere fact of entering the labor market knowing that rights related to family care (maternity leaves, childcare services, etc.) are associated with women's work, and not theirs, is a significant piece of information in the analysis of the construction of male subjectivities. The image of women's differential responsibilities in the family sphere permeates the discourse of many male adults who, in their reflections, show a particular emphasis on the *division* between the productive and reproductive spheres as one of the themes in the construction of their identity.

Thus, the model of societies based on men-providers and women-housewives is still present in the images –sometimes nostalgic– of many contemporary men. That model appears in our respondents' representations as one shaping clear and supplementary gender identities and giving a clear image of what it meant "to be a man" in the past. For them, paid work was an unavoidable responsibility, and it was not perceived –like in the case of women– as something affected by the transformations of the personal or family lifespan, or their households' socio-economic condition. On the other hand, their role as providers of financial resources exempted them –even under the law– from a significant part of the activities linked to raising children and household responsibilities.

By way of example, in our workshops in Colombia we frequently found that most participants mentioned the "moment they assumed responsibilities" as one of the rituals "to become a man". These responsibilities were associated with "*working, having a family and providing for it.*" Perceiving themselves as the breadwinners not only defines the parameters of their financial contribution, but also fulfills a dual symbolic function. On one hand, it affirms their masculinity from an individual and social standpoint; on the other, it gives them certain privileges over other members of their families (privileges they themselves recognize). In the above-mentioned workshops the participants also stated that their position as breadwinners in the family sphere leads them to perceive an "*importance greater than that of women and the rest of the family members*".<sup>49</sup>

Josep-Vicent Marqués affirms that "being a man is being important" (Marqués, 1997). We can add that one of the pillars holding up the hierarchized image of masculinity has been that of men as income-providers for their families: the bread-winner. An image we have seen in the gender matrix of labor legislations that is also permeating male subjectivities.

Now well, if the relatively superior importance of males in social representations is partially based on the provision of financial resources, the fact of being considered a provider

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<sup>49</sup> See Faur, 2004, p. 128.

assumes having a family (heterosexual and with children, of course) is a previous condition. In this regard, the institutional framework also operates by making social rights extensible to the family group provided the existence of a legally recognized family bond is proved.

The institutional legitimation of this male position is not consistent with the evidence that, for men, unlike the case of women, the family-work combination is not a conflict. Working, on the contrary, is part of the role they must fulfill *as men* in their families and society. This role is recognized as such –with no conflict or the need to reconcile family care responsibilities– in the legislation analyzed in former pages and also in collective representations.

Along the same lines, Ariza and de Oliveira (2003) have pointed out that, in Latin America, although different family models have been legitimized, there still prevail more traditional conceptions of the value of the male role as income-provider and its association with attributes of protection, legitimate authority and moral support for families. These findings are also consistent with a large part of the studies on masculinities and gender identities conducted in the region, including those by Viveros (2001) for Colombia, Olavarria (2001) for Chile and Fuller (2001) for Peru.

### **Men and women's work: reconciliation or conflict?**

Considering the representation of the “provider man” model is so widespread and is part of the basis legitimizing hierarchies between the genders, what do men think of women's entry into the labor world and the restructuring of the provision model? Do they accept it? Do they reject it? Do they justify it? Do they promote it?

We have seen that labor legislation *simultaneously* regulated women's entry into the labor world and the mechanisms deemed necessary to increase their possibilities of making family and work compatible. In looking at male representations we can see there is a growing acceptance of female work –something unthinkable decades ago<sup>50</sup> although with connotations and variations. We also find that, like in labor legislation, reference to female work is coupled with the evaluation of their role as family caregivers.

In a large number of cases reference to women's work (particularly when making reference to their partners) is a little surprising. In other words, some men, although few, refer to female work as something completely normal, or perceive it as women's “own right”, while many ask themselves whether it is good or not for women to work, even though this practice is spreading. That question shows that, for many men, women's entry into the labor world – from the perspective of family organization- still has a “non-obvious” nature. And when it comes to references to women's productive work, over and over again, we find a reference to their reproductive activities as part of an amalgamated and indivisible image (a reference similar to the representations the legislation analyzed is based on). We must highlight this perception is virtually inexistent when men refer to their own work, which is not only a lot more naturalized, but it is also represented as an area independent from the time requirements demanded by children and family life.

While reference to women's work is almost always associated with their household responsibilities, the positions of different men with regard to these still show some significant differences and, therefore, we can not speak of a single hegemonic discourse or “male subjectivity” as a homogeneous concept that can be treated in singular.

A closer look has allowed us to identify at least three positions among male respondents. These are associated, on one hand, with their social and education levels, but also with the objective willingness their families find to use public or private mechanisms for the reconciliation of productive and reproductive demands. Thus, we have identified different types of representations, which we will explain in the following pages:

- the acceptance of work and reconciliation by women,

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<sup>50</sup> See Jelin and Feijoó, 1980

- the “pragmatic” acceptance of family work –not feeling comfortable with reconciliation, and
- the opposition to women’s work –the perception of family and work as irreconcilable spheres.

### Acceptance of work and reconciliation by women

Of the men interviewed in Buenos Aires, in the context of a severe socio-economic crisis, those who accepted women’s entry into the paid work market did it after considering the availability of an additional source of income for the household, or considered it as something normal, particularly in those cases where women’s work preceded the conjugal contract. This was particularly found in the group of respondents with higher education and socio-economic levels.

*M: She already worked. When I met her she had two jobs, one in the morning and another in the evening, and once we married she kept one. But she continued to do the same activity.*

*I: And when Macarena was born, did she take a leave and then went back to work?*

*M: Yes, yes. She continued to work regularly... Since she worked in the morning, the work shifts... She got to work at eight. Macarena slept. She would be back by noon, (...) the baby woke up at ten, so she was without her mom for two hours; another person took care of her. And then, when she entered kindergarten Graciela was also a kindergarten teacher. She went to kindergarten and her mom worked at a kindergarten. It was a different one, but they had the same schedule. Graciela picked her up once she got off her job. Thus, their schedules were pretty much the same and the baby didn’t suffer that much because her mother worked, which is what happens when the mother works for eight hours, or has to work for eight hours”. (Employed. University graduate. 47).*

It is interesting to note that this respondent considers his wife’s working as something natural. In his response, however, he fails to mention the fact that *she* is the one that has to adapt her schedule to care for the child. In this account we can identify several mechanisms linked to reconciliation, all of them in the sphere of women’s responsibilities. We can see, on one hand, that she went from working full-time to working part-time even before her child was born. Also, that as a result of her work as a teacher and, therefore, in the formal sector of the economy, she had the maternity leave benefit, a subject absent in the man’s account.

We can also identify two care strategies during the early years of the child’s life. Before she entered kindergarten, the mother hired somebody to take care of the child at home, a “replacement” for the mother (the reference to hiring in the market while the daughter was “without her mother” is clear). The child then enters kindergarten and the mother is the one picking her up once she gets off work. No reference is made to childcare centers (they may not have access to one or it might be the family’s decision). Instead, as is common in a large part of Latin American middle-class families, both leaving the main responsibility in the mother’s hands and hiring a person to provide care services is naturalized. Something else not discussed is the fact of having to hire that service in the market, in contexts where –unlike the above-mentioned European markets– leaves are not long enough to cover the child’s first year of life.

The acceptance of female work, couple with strategies to reconcile the productive sphere, was also a topic not addressed in the workshops with Colombian government officers. There, participants analyzed the different external pressures men and women experience upon entering the sphere of paid work. Also, in these debates reference was made over and over to women’s domestic responsibility, which appeared in its historic and essentialized form. Thus, participants affirmed women’s entry into the sphere of paid work must be balanced with “their” domestic responsibilities.

It was interesting to find that, when the analysis focused on the strictly productive world, the participants in the workshops had a hard time identifying obstacles to the promotion of women in hierarchical positions. But this difficulty disappeared once they were encouraged to reflect on the way in which the work-family tension operates in women’s lives. In that moment, several of them recognized that the biggest responsibilities women usually have in the family environment actually operate as an obstacle to their professional development.

Still, the most interesting aspect found in those workshops was the way in which participants -public officers- imagined potential mechanisms allowing the reversal of these trends. They suggested organizations should have “appropriate regulations” to guarantee “women’s fundamental right to participate on different levels”; they also suggested Supervising Committees to follow up on rules created to that end and talked about organizational and regulatory details to reinforce women’s participation in decision-making positions in their organizational spheres. Notwithstanding the above, none of them suggested proposals regarding the promotion of strategies to encourage male involvement in family care, for example, by extending paternity leaves or leaves in case of a child’s disease. This absence confirmed, once again, that the notion of raising children as a responsibility of “mothers” is deeply-rooted in male social representations.

Similarly to labor legislation, it would seem that, according to the representations of these government officers, it is easier to consider equality as a principle applicable, or desirable, strictly in the labor sphere, as opposed to developing a comprehensive perspective of the public and the private world as spheres that require a restructuring of responsibilities for an effective quest for equality.<sup>51</sup>

### **“Pragmatic” acceptance of female work: feeling uncomfortable with reconciliation**

Some of the male respondents in Buenos Aires expressed more conflicting positions regarding women’s work compared to that in the previous case. Their accounts strongly reflect the tension resulting when two significant mandates are out of balance in their representations: 1) the traditional sexual division of labor, and 2) the need for resources contributed to be sufficient to provide for the family. Thus, we can identify emerging discourses where certain men affirm they would prefer women not to work, but accept it because the situation makes it necessary:

*“To tell you the truth, I don’t like the fact that she has to work. But right now I kind of have to shut up, I can’t tell her anything because it’s really necessary.”*

*Interviewer: And why don’t you like the fact that she has to work?*

*“It’s not a macho thing ... (if my wife was around, she would say, ‘It’s a macho thing’). I have a very clear picture, for example, of my old man, my family, and the way I would have liked it to be. My old man working and my woman with me at home. It’s not the fact that she can become a professional or not, but I believe a mother should stay with the children and a father should go out, work and bring money” (Employed, high-school graduate, 28).*

It is rather obvious that, in this case, the partner’s work is neither accepted nor valued, but barely tolerated, based on the recognition of the need for additional income, at a significant subjective cost for the man, who would seem to perceive a certain deficit of authority as a result of not being able to provide the resources necessary for the household’s functioning. We can see the respondent does not even feel legitimized to express his disagreement (“*I have to shut up*”), which would indicate that, if he was able to provide for the household from a financial standpoint, at least he could ask his partner not to work. The idea of women as the ones exclusively responsible for childcare is powerful in this account, and it is interesting to note that it does not compete at all with women’s education, although it competes with their work.

Another respondent expresses a similar tension upon thinking of his partner’s work, but adds a new twist to his own analysis of the situation. An interesting element found in this case is the fact that the woman imposes her perspective, in response to which this respondent can no longer find an opportunity for a different type of negotiation and finally accepts, and even values, the new life model:

*“When my second daughter was born, I would have loved to tell my wife she didn’t have to work anymore... She even told me, “No, I don’t want to quit my job. Who told you I want to quit working?” It’s just that men were raised, we were raised, with a series of... Look. When I was a kid I always imagined a*

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<sup>51</sup> For an observation on the form in which the “principle of equality” is present in the legislation analyzed, see Pautassi, Faur, Gherardi, op.cit.

*nice wooden house, working hard at an office, a bride with a white gown, a party, and that was it. Reality showed me that everything happening to me is a lot nicer, a lot more interesting... but that imaginary is there all the time, it appears all the time” (Employed, high-school graduate, 41).*

Still, in both accounts we can see, once again, that the representation of raising children not only involves a responsibility (hopefully a full-time one) to be fulfilled by women, but also a family and private strategy. The availability of public services contributing to reconciliation from the logic of public policy is not mentioned or demanded. Also, they do not question the fact that families are the ones responsible for the everyday reproduction of their members.

In other cases, in interviews we can not include here due to lack of space, the tension between imaginaries of provision and the sexual division of labor in traditional terms is solved by looking at women’s work as a “temporary contribution” susceptible of being changed if the context allowed for the reassembly of the above-mentioned provision model, which is centered on the male figure.

### **Opposition to women’s work: perception of family and work as irreconcilable spheres**

The extreme of feeling uncomfortable with women’s work can be identified in some men who explicitly oppose women’s entry into the work sphere and do not consider any possibility of “reconciliation” between women’s paid work and *their* family responsibilities. This type of discourse is mainly found among males in those sectors with the highest level of social disadvantage who, on the other hand, are the ones objectively having fewer reconciliation mechanisms. In effect, women from popular sectors usually get jobs in the informal sector of the economy, often times in domestic service, and they seldom have access to social security benefits (some of which were analyzed in previous pages). On the other hand, income in these households is usually not enough to hire childcare services in the market, and only a few countries in Latin America have state services offering that possibility as part of universal public policies (Martínez Franzoni and Camacho, 2005, in Martínez Franzoni, 2005). In fact, the gap for children in the early years of education is really big, a fact related, to a large extent, to the limited offer in this area by the state.

The arguments present in discourses that oppose women’s work allow us to see that this is perceived as the trigger of a full transformation of roles and positions within the family, rather than a legitimate contribution or shared responsibility. This can be found in references like the following:

*“I wouldn’t like my wife to go out to work, because she never did and I would feel bad. I mean, should I stay home as a housewife so she could go out to work? No. I would prefer to stay the way we are. I always do odd jobs. Basically for my children. If she had a job, not seeing her might affect them. Or I wouldn’t be as patient as she is.” (Unemployed, incomplete high-school studies, 22)*

This account would seem to be based on the symbolic maintenance of a dichotomous model where, if women work, men would be exclusively responsible for childcare and the household. Women’s work would lead men to have doubts about their position as providers, and even about the well-being of their children, who, in their mind, “would not be able to see her” directly. But in addition to this, the image clearly emerging is that if one of them works, the other must necessarily stay at home. With this backdrop, their own image is perceived as “feminized”, which is not nice at all to the extent it challenges one of the central pillars of the social and individual construction of virility and, with it, its differential hierarchization.

This notion is clearly more consistent with a system of *roles* -in the sense of watertight roles with specific limits and responsibilities and a pre-established gender assignment- as opposed to one of *social relations*, under which there should be no functions with predefined boundaries, but tasks to be performed, and it is in the game of family interactions and relationships where the decision on how and by whom they will be performed is made. Thus, we find that some male representations of female work reflect part of the tensions men experience with regard to the transformation of the provision model in families and the

fading of their own role as the sole provider of resources, along with the added prestige this gave them in families and society.

### Debates around women's work among men

It is worth mentioning that in the workshops held in Colombia references to women's work were far more extreme than those in Argentina. We found this among both those with positive positions towards it and those showing resistance. Given the different methodology used in both cases, these differences can not be associated –in principle– with the cultural differences between both contexts. They must be construed as discourses emerging, in the Colombian case, from processes of interaction and debate among peers.<sup>52</sup>

The value of women's economic participation was addressed in these events with two different logics. On one hand, participants addressed its pragmatic dimension: the fact that women work means there is another income in the household and, to a certain extent, it reduces men's responsibility as the only breadwinners. On the other, some men recognized work as women's right and maintained that this increases the possibilities of more equitable relationships between the genders, a fact they considered positive. In this case, group reflections facilitated this type of statements, which are more proactive in terms of women's entry into the workforce, to the extent it was construed as the exercise of their rights as human beings.

References against women's work were also strong, which led to intense debates among the participants in the workshops. In these debates, some participants did not avoid retrograde discourses on the need to maintain the pre-existing "balance" in the assignment of traditional gender positions. Women's work was interpreted as a "lack" or "absence", that is, considering the things women no longer offer to the family, rather than what they provide. We also found a repeated reference to the "absence of women from their homes". Feeling uncomfortable with this image of a vacuum translated into comments in the sense that children "have lost the motherly image, with childraising now in the hands of their grandmothers or domestic workers". It was quite clear that the replacement of full-time maternal functions was interpreted as something negative. But it would also seem natural to leave this care in the hands of other women, in addition to the fact that no reference was made to the need of building a new consensus around raising children and care shared by men and women, or the need for mechanisms offered via social policies.

In one of the workshops there was an active discussion on the increasing levels of violence among young people, which some participants insisted on relating to "women's exit" into the public world, reflecting both the depth of representations linked almost exclusively to the psychological, physical and social stability of their children and the association of that image with the domestic confinement of women.<sup>53</sup>

Far from being isolated discourses limited to a few men –or women–, this type of representations are currently permeating some of the policies aimed at relieving poverty in Latin America. That is the case, for example, of the Plan "Families for Social Inclusion" in Argentina, which transfers income to families with children under 19 and, according to the body executing the policy, the Ministry of Social Development: "is aimed at including 750,000 single mothers who, by joining the new plan, instead of a work benefit, will have an obligation to take care of their children's health and schooling, in addition to having the

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<sup>52</sup> There may also exist differences between both contexts, as well as between different cities and regions in each country, but the different methodologies used do not allow us to account for them. In this regard, it is interesting to consider the work done by Mara Viveros, who compares differences in the social construction of masculinities for two regions in Colombia (Viveros, 2001).

<sup>53</sup> It is worth mentioning that several empirical studies on juvenile crime (quoted in Kessler, 2004) have shown a certain ephemeral and short-term correlation between criminal activities and being part of a family where both parents are not present. The most conservative analyses insist on blaming the family structure for this correlation, and they even speak of "non-intact families". Other studies show that this relationship does not originate in the family structure, but its linking dynamics. Kessler stresses that, in order not to confuse correlation with causality, it is necessary to understand *what* the probable causal relation is in that relationship.

possibility of receiving work training”.<sup>54</sup> The discriminatory contents of this plan are worrying because, far from consolidating an employment policy aimed at improving women’s working conditions or reconciling family and work life, they reinforce the responsibility of childcare as a problem related to women and the private sphere, and even refer to the “employability” of female heads of households with children (Faur and Gherardi, 2005). On the other hand, according to ECLAC (2004<sup>a</sup>), only three of the programs targeted at female heads of household in Latin America include the delivery of childcare services -*Mujeres Jefas de Hogar* in Chile, *Construyendo Oportunidades* in Costa Rica and *Guarderías Comunitarias* in Guatemala..

### **Men before domestic work and reconciliation**

If entering the workforce has been coupled, in the case of women, with the need to make their responsibilities in the productive and reproductive spheres compatible, and social institutions addressed this requirement, for example, through labor legislation, what happened to male representations regarding men’s involvement in the domestic sphere? Did the structuring of new forms of provision –shared to a large extent with women– somehow challenge their position in the sphere of domesticity? Not that much, apparently.

In general, research conducted to analyze the transformations in the sexual division of labor within households has shown that the images of who must do unpaid work have changed faster than effective practices. It also shows that beliefs around the appropriate roles for men and women in the labor world have changed more than these images related to the domestic sphere (Coltrane, 2000; Wainerman, 2003). In other words, even though the social consensus around women’s economic participation has become more flexible in all cases, the fact of perceiving them as the ones responsible for household chores and raising children would seem to be the hard core of the transformation of social gender relations.

Therefore, if we consider the notion that “reconciling” assumes the previous existence of a tension or collision “between incompatible parties”<sup>55</sup>, we can understand the fact that, in male representations of men themselves there is no antagonism between family and work, particularly because work to be done within households is not usually perceived as a responsibility of their own (or a shared one). Failure to raise this issue has to do with the assimilation and reproduction of considerations regarding differential obligations and rights for men and women. And, as already explained in these pages, those collective representations (and practices) permeate both the regulation of labor rights and other public policies targeted at families.

It is not easy to find discourses referring to the need of *reconciling* work and domestic responsibilities upon focusing on men. When men participate in the domestic sphere the idea that they are “collaborating” with their partners is still present, whether they do only it to meet the needs of domesticity when “she is not at home” or when “they have the time”. In other words even though there would be a slight increase in the actual burden of time men devoted to fatherly and domestic tasks, it is also clear that this time burden continues to be significantly lower compared to that of women (Araya, 2003; Aguirre, Sainz y Carrasco, 2005).

In any event, *male domestic participation is not assessed in terms of making it compatible with productive work, like in the case of women*. We seem to be in the presence of the opposite side of that research that highlighted women’s paid work as “secondary work” twenty years ago.

This representation places the problem of reconciling family and work, once again, on the side of women. They are the ones who must currently “reconcile” both spheres, while men do not perceive themselves as questioned in that regard.

<sup>54</sup> See: [http://www.desarrollosocial.gov.ar/Planes/PF/pf\\_lanzamiento.asp](http://www.desarrollosocial.gov.ar/Planes/PF/pf_lanzamiento.asp)

<sup>55</sup> According to the Royal Academy of the Spanish Language ([www.rae.es](http://www.rae.es)): “Reconcile: 1. tr. To accommodate and adjust the states of mind of those opposing each other. 2. tr. To conform two or more apparently contrary propositions or doctrines. 3. tr. To win disposition and benevolence or, sometimes, hatred and abomination.”



Now well, these images change significantly in those cases where men are unemployed and the woman is the one providing for the household. In this case, participating in activities related to child raising and domestic activities ends up being represented almost as an obligation. But there is a significant reemergence of the logic that indicates they are performing a role outside of their gender belonging. They justify this because they are unemployed, and indirectly state that if the provision system was restructured, that of reproduction could be restructured too. This is how one of the respondents expressed it:

*“...my woman started a business. Her work schedule was irregular. And I performed the role of a mother, I did it at home. I cleaned, washed, pressed clothes, cooked, took children to the park ... everything she did I did. And, well, it was a little difficult, but then I said, “What am I going to do? I don’t have a job!”, I just have to do it and that’s it... they are my children, I have to do it (...) I did everything, everything at home, everything... I didn’t have a job!” (Unemployed, high-school dropout, 32)*

The context of unemployment adopts a peculiar characteristic in some male representations of childcare and domestic activities. Somehow, it does not reflect a *reconciliation* of responsibilities -because what has been altered is precisely the dimension of male productivity- but the reconciliation of a possible replacement of women in those activities that were left vacant as a result of their exit into the labor market. The dichotomous model - where one of them works and the other does household activities- still has a strong presence among men, but allows for a certain transformation in the assignment of responsibilities, considering they can not provide monetary resources.

For men, growing in a determined generic system leads them to perceive a universe of contrasts that cause the assignment of provision and care responsibilities -as fields that do not require harmonization in their own lives- to permeate their subjective experience and social relationships. Thus, the emerging representations of *masculinities* spread to both the individual (intimate) level of possibilities and demands with respect of their own self, and the social (relational) sphere regarding their position before other individuals.

In summary, it becomes quite clear that the organization of family and work responsibilities is crossed by multiple social, economic, cultural, political and subjective factors, and it takes place through a diversity of institutional arrangements. Therefore, its transformation is also complex and multi-determined.

### **III. Final considerations: about the need to formulate reconciliation policies to get men involved**

All throughout this text it has become fairly evident that the “productive-reproductive *continuum*” appears as an assumption of the public policies and social representations examined almost exclusively by focusing on women’s life, while it becomes a lot more blurred in the case of men. The other side of this is that the images of men as individuals with “provision” responsibilities, but not “family care” ones, spread to both the regulation of work and contemporary subjectivities.

In other words, if the opposing parties in the dispute seeking to generate forms of reconciliation are work and the family, women are still the *subject* of that reconciliation. That “opposition” is not apparent in the case of men, which can be explained in part by the vast lattice of collective representations and institutions making it easy for them to have a position in the system of social gender relations that only has a laconic mandate regarding care for the members of their families; a mandate barely altered despite the deep transformations in the scheme of providing resources for the household.

The family-work reconciliation defined as such, either by conviction or omission, will continuously face excessive obstacles for working women, whose total workload, as shown by time use surveys, is higher than that of men (if productive and reproductive work are considered). In the case of women this situation leads to high levels of demand in each of these spheres and, at the same time, the need to deal with the balance between both, often

times waiving the possibility of broadening their perspectives of participation in the labor market, the quality of meals or homecare, as well as their personal rest or leisure spaces. On one hand, there are discourses recriminating the absence of women from their homes, like those of some of the male respondents. On the other, images of “juggler” or “tightrope walker” women are permeating the media, based on the findings of research done with commercial purposes.<sup>56</sup> A well-known brand of laundry detergent targeted at a relatively high-income segment has developed multiple sales strategies claiming, as one of the best qualities of their product, that it allows women to have “time to live their own lives.” They no longer offer whiteness or a better price. Their advertising campaigns attempt to sell these women what they long for: “time to themselves.”<sup>57</sup> And for any current advertising women continue to be the clear target of these and other cleaning products, products to nourish their children and families, and multiple baby care supplies.

From this perspective, it is rather obvious that, in order to achieve an effective reconciliation of family and work whose side effects do not continue to perpetuate male privileges or the female work overload, a new “sexual contract” is required. This contract includes, but also goes beyond, the definition of labor policies and actual reconciliation policies, and it should incorporate men not only as part of the problem, or as individuals not related to it, but mainly as individuals jointly responsible in the search for a new balance. But what type of institutional arrangements and subjective transformations are necessary to that end? What types of policies can contribute simultaneously to this institutional and subjective transformation?

For many women, and for a large part of men –upon thinking about themselves- addressing the complexity of the family-work reconciliation appears as a *hydra* with multiple heads, with presence in diverse institutional, cultural, political and subjective scenarios. The strategies aimed at transforming it also demand actions on different levels and in different scenarios attempting, on one hand, to enhance argumentative aspects and those related to the production of knowledge and, on the other, to assist in the transformation of institutions and subjectivities. The following are some of the proposals to improve the strategies to reconcile family and work and consolidate the gradual construction of a new “sexual contract”.

***With regard to argumentation and the generation of knowledge:***

To enhance the conceptualization of gender equality in family-work reconciliation strategies as a *human right*. From a philosophical standpoint, there is no doubt that women’s autonomy and the possibility of exercising their citizenship is limited by the work overload or the difficulty to participate in the employment market as a result of the obstacles they find in reconciling both spheres. From a regulatory standpoint, there are numerous international legal frameworks and recommendations by human rights committees that guarantee equality in these spheres and should be systematized and used for purposes of argumentation and the demand of this expansion of rights.

To expand the scope of *time use surveys* in those countries that have not developed them yet, so they can reflect the existing gap in the total productive and reproductive workload by gender. To find out what happens with younger generations in this regard.

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<sup>56</sup> In November 2005, “La Nación”, a traditional newspaper in Argentina, published a front page article on the “*time freaks*” phenomenon. It read, “*Neither jugglers nor tightrope walkers (...) They are women ages 25 - 49 who practice their professions, are married, have children and meet the four essential requirements to be considered “time freaks: they don’t have enough time, do several things at the same time, perform tasks in a rush and would like to have more hours to themselves”*”. <http://www.lanacion.com.ar/755352>

<sup>57</sup> A document available on this company’s website states: “Skip® has worked hand in hand with women, offering them the best washing results through products specifically developed for their needs, aware of the fact that, as washing clothes becomes more efficient, they will have more time to do what they like the most: living their life. For this to be possible, Skip®, the brand on the leading-edge of innovations in the category of laundry detergent, studies and supports Argentine women”, on [www.skip.com.ar](http://www.skip.com.ar). (“Skip” is a brand owned by the company Unilever, which currently funds multiple studies on this subject).

To reinforce macroeconomic studies that, based on the conceptualization and quantification of the *economy of care*, show the important unpaid contribution women make in this regard.

To further studies on *male subjectivities*, particularly those exploring the ways in which men perceive their own positions and that of women in the work and family spheres.

***With regard to the design, implementation and evaluation of public policy:***

In the definition of *employment policies* it has been emphasized that there are still several pending issues to improve the reconciliation of the productive and reproductive spheres. It is essential to expand the mechanisms allowing workers to have the time required for the provision of care, resources to provide care, and *quality elderly and childcare services*. But these mechanisms must also become universal, and their coverage must be extended to those participating in the informal labor market in general, and domestic service in particular, in addition to giving men equal rights and responsibilities. The definition of paternity leave “quotas” to promote the involvement of men in child raising activities seems to be a positive strategy to be replicated in Latin American countries.

*Poverty “relief” policies*, on the other hand, must decisively incorporate a gender approach into their definition, implementation and evaluation. It is worrying to find that many of them continue to perpetuate the role of women as the main or exclusive providers of care for their family members, instead of encouraging them to participate in the paid labor market and, consequently, to improve the chances of overcoming poverty in their households. Something even more worrying is the broadening of the social and cultural gaps between different socioeconomic sectors brought about by these policies. Current policies targeted at middle classes can hardly sustain such principles.

Furthering *sexual and reproductive health policies* allowing women and men to make decisions about whether or not to have children, when to have them and how many is a condition necessary so individuals can autonomously decide the size of their families and the burden of responsibilities they are willing to bear upon entering the paid work market or participating in other spheres of social and political life. Therefore, continuing to make efforts in this direction, in addition to linking men to those policies, is desirable.

Finally, it is important to develop a multidimensional strategy around *cultural change policies* that influences the contents of the above-mentioned strategies and pursues the construction of subjectivities –particularly male ones, though not exclusively- based on joint responsibility in the tasks of raising children and caring for family members. These exceed labor and family policies and, therefore, must have an effect on other image construction mechanisms and social representations that range from social media to microsocial participation spaces.

Linking the notions of “virility” and “care” on a cultural and institutional level would seem to be an issue that can not be postponed in order to achieve gender equality in the strategies to reconcile the productive and reproductive spheres. The way in which individuals represent their responsibilities in the spheres analyzed is central from the standpoint of the conditions enabling democratization in families; of the organization of “dual provision and dual care” systems and the socialization of future generations in the framework of a morality that responds to principles of justice not involving women’s subordination. It is also eloquent in terms of the feasibility of stakeholders assuming the transformation of social gender relations. In the case of men, for example, that they use paternity leaves, if they exist; that they fight to have them, in case they do not exist, and that they have a more active participation in structuring a new societal care matrix. If the path towards institutional changes is long and winding, the one aimed at changing the cultural scaffolding can be even more complex, but not less decisive for that reason, for the success of reconciliation policies. And, definitely, in the construction of a new “sexual contract”.

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## **POLITICS, REPRODUCTION AND THE FAMILY: SOME ELEMENTS OF THE FEMINIST DEBATE**

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In this session I will not deal with the demographic, cultural and labor changes that have changed procreation patterns and, therefore, the configuration of families. I will not speak about the different types of families existing, or remind you of the path walked by women which, despite unquestionable obstacles and lacks, has been long. My interest is that of explaining the new dimensions reshaping procreation processes and the creation of families, to then confirm their absence in the political discourse. I would like to speak about three phenomena, because “Social changes are refracted through the family and, in turn, affect the individual’s upbringing” (Jacoby: 1977). The first is the father deficit; the second is that of assisted reproduction methods, and the third is that of homoparental families<sup>58</sup>. The three have different repercussions on social life; from there that they must be clearly stated so we can at least integrate them, from a nominative standpoint, into the broader perspective of politics. Bearing in mind there is not enough time to get deeper into the subject, I will make a short summary of different mosaic pieces. I will start by briefly describing these three phenomena.

By father deficit I refer to the absence of men performing the fatherly function. This phenomenon takes place not only in single-parent families, but also in traditional ones, and it poses a significant problem when it comes to childraising, the social fabric and political culture. This father deficit is defined by two interrelated circumstances: men’s old habit of delegating childrearing to women, and women’s increasing instrumentalization of men as agents of their fecundation, excluding them from the later care and childrearing process. All this leads to an increased number of single-parent families headed by women. Because masculinity is defined by a man’s role as a provider, men usually work long hours, which makes their participation in affective and care tasks difficult, in addition to the fact that they spend little time with their children either because they work on weekends or they are tired. They go from busy to absent fathers. The Frankfurt School pointed out the following some time ago: “The most important fact in the transformation of the family is the reduction of the father’s economic importance as a provider and a relatively independent power”. (Frankfurt Institute for Social Research: 1972). In those cases where women also work, they resent men’s limited fatherly participation. The father’s current weakness in society reaches the farthest corners of the psychic household, and if the alleged basis for the construction of the individual’s “mental” household is the family household, what are the consequences of the idea that a mother “is self-sufficient” on social organization?

Women, who in principle are forced to do without men, gradually choose this as an option, and increasingly tend to exclude men from the family’s upbringing. Thus, we can see that, as a result of these two circumstances –men avoiding family responsibilities and women doing without men- a growing phenomenon has emerged: women have “taken possession” of children from a social and personal standpoint. This phenomenon is already common in highly traditional families, where children “belong” to women. And while it is true that the labor world does not help men assume their share of responsibility, it is also true that a significant number of women whose male partners are willing to share family responsibilities do not allow them to do so. One of the elements at stake in women’s

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<sup>58</sup> According to Roudinesco (2003), the term *homoparentality* was coined in France in 1996 by the French Association of Gay and Lesbian Parents and Prospective Parents (APGL).

resistance to share childrearing is the huge quota of power resulting from the role of being a mother. Now well, this leads to a range of problems also political in nature, such as the transformation of the need for a fatherly figure into political proclivity for authoritarianism (Adorno *et al* 1982 [1950]).

The second phenomenon is that of new reproductive technologies, which have transformed the human procreation process. Technical-scientific advances in reproductive medicine have led to unprecedented forms of procreation (*in vitro* fertilization, sperm and egg donation, embryo transplants, etc.) that have come to shake the consecrated assumptions of Western ideology with respect to kinship. These technological changes are a paradigmatic example of the human capacity to go beyond the limits of biology and to impose culture, and they influence the way of looking at kinship and offspring. When a woman donates an egg, the already fertilized egg is implanted in the form of an embryo in another woman, who carries the pregnancy to term. Then, a third woman adopts the infant. Who is the mother? Under these very novel circumstances, the biological definition is no longer operational and, by comparison, the role of culture is definitive. These changes lead to concerns in “hidden sectors of the human imaginary” (Héritier, 1996:7) and we can not affirm a series of manipulations like these will not affect individuals. However, these changes in the way of procreating and structuring kinship relations have not led to a public debate around relations between human beings.

Third, homoparental families. Civil unions between homosexual individuals were legalized in Denmark, Norway, Sweden, Iceland, Finland, France and Germany in the 1990's; the same happened more recently in Portugal, Great Britain, Hungary and Croatia, as well as some cantons in Switzerland. In South Africa, New Zealand, some parts of the United States, Australia, Brazil and Argentina those unions are now also accepted in the form of registered civil couples, where individuals, regardless of their sex or kinship relations, can grant each other inheritance and social security rights. The Netherlands (2001) and Belgium (2003) omit any reference to the sex of individuals in marriage contracts, which Spain and Canada did this year. The passing of laws allowing homosexuals to get married and adopt children is a consequence of the juridical and cultural process that has been taking place in the European Union and some other countries that have gradually granted homosexuality the same legal status as that of heterosexuality.<sup>59</sup> Over the course of the last 25 years, the increasingly visible presence of lesbians, gay and transsexuals, with their civic equality claims, encouraged a legal debate around the discrimination on the basis of the sexual orientation of individuals of current laws. Equalitarian principles, inherent in fundamental rights (the right to intimacy, freedom of thought and free speech), are an integral part of the European Community law. They are the basis for action of groups of litigious activists whose judicial complaints have entered a legal action stage in the European Court. At the same time, we have witnessed the emergence of research and academic reflections on human sexuality that gave homosexuality a different sense and a different meaning. All this transformed sexual orientation into a matter susceptible of being addressed by traditional juridical instruments aimed at protecting human rights and fundamental liberties (Borrillo: 2000). Thus, the relevance of regulating citizenship on the basis of sexual life was questioned, which led the European Union to suggest a series of legal changes to assign homosexuality a different legal status and involved a shift from its penalization to its legitimation in less than 20 years.

What is the meaning of the above in terms of procreation and the family? How do these changes transform the political discourse? What is unleashed by the increase in the father deficit resulting from the growing number of women doing without men as fathers, by the facilitation of procreation processes outside individuals' bodies and the end of the prohibition for homosexuals to get married and adopt children? Not the collapse of society,

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<sup>59</sup> In 1997 the Amsterdam Treaty incorporated sexual orientation as one of the reasons for discrimination that must be abolished. Sexual orientation is defined as the affective and sexual desire that may exist between individuals of the same sex, the opposite sex or, indistinctly, with individuals of one sex and the other. It can be considered a choice and, therefore, as something similar to what happens with religion or, as a predetermined condition, with race, and it must be strongly protected (Borrillo, 2000). In 1999, the Amsterdam Treaty was ratified by the 15 member countries of the European Union.



as conservatives predict. If there is something we already know, it is the fact that neither the family nor kinship are immutable. The historicity of families is a fact: they are social, mutant organizations; and bearing in mind the ways we are constituted are varied, the only thing the different types of families share is the name. We must remember the scandal associated to divorced families in the past, to blended and monoparental families afterwards, and to “artificial” families (as a result on new reproductive technologies) later on. At the time, conservatives raised the roof and made dark predictions on the negative effects those family arrangements would generate. Today, despite such gloomy predictions, these families are considered “normal” by society, to such an extent that, for those having resorted to new reproductive technologies, the children’s biological origin is even “forgotten”.

Assisted reproduction technologies consolidate the predominance of the symbolic and, without more ado, discard the definition of the family based on biological kinship: today offspring is nominative, not genetic. Therefore, if kinship ties are no longer determined by procreation itself as a biological fact, and if blood inheritance has adopted a secondary role, then what is the role of the family?

The key issue emerging here is that of human care (Izquierdo: 2004). This refers us to those responsible for taking care of children: the sick, the elderly and the disabled. This dilemma poses several problems, one of them being the so-called domestic work, which takes us back to the beginning of feminist reflection. Thirty five years after the emergence of the women’s liberation movement, the issue of domestic work is back in the spotlight, in a completely different scenario. In addition to this we have the fact that the basic conflict of women in society is still linked to the experience of motherhood. And this constant strongly reflects the weight of the sexual difference, in its three components: flesh, mind and the unconscious (Lamas: 2002).

The persistence of women’s desire to be mothers adopts different forms: one is the traditional model of those seeking to have a child with a given man, while another includes those who do not want a father and do not tell men getting them pregnant about the pregnancy, and a third one includes those, whether lesbians or heterosexuals, who make the decision to resort to artificial insemination. The novel aspect here is the desire of two men to become a family, adopt children or conceive them via assisted reproduction techniques. What will be the impact of the phenomenon on the fact of thinking that “caring for” a family not only involves affective care for people, but also a series of “domestic” tasks?, i.e. unpaid tasks imbued with symbolic value but lacking social support? Domestic work is not recognized as work, in part due to the idea that it is an expression of love, and also as a result of the way work is traditionally defined as an economic activity. Women do most human care work in the household for free; this work is also done almost entirely by workers with low salaries outside the family environment. Care for the elderly, the sick and the disabled also belongs to the family sphere and, therefore, it is women’s responsibility, and it is only where these dependents do not have a family (that is, a female relative taking care of them) that the State intervenes.

Last year the IDB published the book *Women at Work. Challenges for Latin America*, (Piras: 2004), which includes a series of essays that show, based on empirical evidence, that women still face significant problems upon entering the workforce: they are at a clear disadvantage in the labor market when it comes to salaries, social security, work protection instruments, unemployment, occupational segregation and management positions. This publication also recognizes that, in spite of all of this, including the depressing Latin American scenario of the 1990s, women’s achievements are particularly encouraging. Notwithstanding this optimistic note, it also affirms that, despite women’s better and higher education levels in the region, their talents and potential are not being tapped. Therefore, they must receive support via public policies facilitating their increasing responsibilities with regard to their productive role and encouraging their participation towards equal salaries.

I understand subjects must have a limit. However, when it comes to speaking about women’s paid work, can we remain silent about their family responsibilities? What characterizes the

evolution of women's work? Women have a significantly increased access to higher education, have consolidated their use of contraceptives, hold paid male positions and are joining politics. And despite the key transformation in their relationship with paid work, their relationship with domestic work has barely changed. Does this bear any relationship to the desire to be a mother?

If we are to continue to exist as a species, one of the tasks that will become extremely important in future years will be that of weighing a new way of procreating and caring for human beings. One of our challenges as a society is that of ensuring children get the care they need during their early years, and the sick, the elderly and the disabled the care they require, but not provided for free by women in the form of a cultural gender assignment or a labor of love. Will changes in men's mindsets and behaviors lead to a different kind of human care, childcare and family relationships? Will we see a change in the sex gap in domestic work as a result of the phenomenon of gay men families? Will we get to value everyday life as a productive space (domestic work, affective work, social demands for life infrastructure, release from work overloads)? A significant indicator of current alienation is the so-called father deficit, which is nothing else but most men's absolute lack of interest in childraising. Only male participation in the human care and childraising process offers a real possibility of transforming this dehumanized model.

Latin America is a boiling region. Both internal democratization processes and the opening of its economic borders confront us with several challenges. Although it is difficult to prevent the consequences of the processes on the local economy and our different societies, it is rather obvious that globalization will destabilize the basic patterns of social behavior. Internationalization promotes the adoption of new lifestyles and new consumption models, and it demands work to be freed from traditional restrictions, whether institutional, legal or family-wise. Within the reshaping of work lie the trends of the new century: the recognition of pluralism, respect for sexual diversity and democratic participation.

Of the three phenomena I have mentioned, the one probably generating the biggest social concern is that of accepting the fact that lesbians and gay people can get married and have children. This measure, although easy to implement, as the only thing it requires is an amendment to the Civil code and very specific reforms to certain regulations, causes fear inasmuch as it questions the symbolic order built upon a heterosexist rule. That order maintains the complementary nature of the sexes and, at the same time, it is homophobic and discriminates on the basis of sex and. Homophobia is an irrational fear of homosexuality, either because an individual is afraid of feeling erotically attracted to another person of the same sex or due to the alleged repulsion caused by certain sexual practices. This is not the best place to explain the fears and apprehensions surrounding homosexuality<sup>60</sup>, but it is the right one to point out the reservations and fears present in the environment around the alleged consequences of gay marriages and homoparental families.

Legally accepting homosexuality does not necessarily men individuals admit it subjectively or understand what human sexuality is. The European Court of Justice and the European Parliament have legitimized homosexuality as a legal behavior; however, large sectors of the population still see it as a degeneration or perversion, and they associate homosexuality with pedophilia, pederasty, cross-dressing and prostitution. This misconception is particularly in conflict with the family. Certain sectors not objecting to the recognition of homosexual couples fiercely oppose equating homosexual unions with marriage. This rejection comes from the notion of the prospective psychological damage infants can experience if raised in homoparental households. They maintain that if an infant is the everyday witness of two individuals of the same sex as a couple, the construction of his/her

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<sup>60</sup> Conservative positions maintain the "unnatural" nature of homosexuality to impose their moral vision and the social behaviors validating it. They forget that the "naturalness" of homosexual practices has been proven in societies all throughout history. In addition, it is not valid, neither ethically nor scientifically, to set a moral imperative based on an alleged "natural" order. The "natural" with respect to human behavior does not exist, unless it is meant in the sense that everything existing, everything human, is natural. The term "natural" is used to stigmatize certain practices and also to suggest the "normalization" of individuals and, in some cases, their repression.

subconscious representations will be hindered and he/she will eventually face significant difficulties in having a fertile experience with individuals of the opposite sex. From this perspective, homosexual parenting compromises fundamental psychic processes. However, psychoanalysts with clinical experience in homoparental families affirm the presence of both sexes in the household is not a requirement for a child to grow mentally healthy. Exactly in the same way being raised by a mother or grandmother alone does not confuse children regarding the way human beings are procreated and does not prevent individuals from learning the difference between the sexes, living in a family of two lesbians does not do it either. Believing that individuals raising children must be of both sexes is an essential requirement for their mental health means, precisely, to disregard the weight of the symbolic and to quite conveniently avoid the undeniable fact that biparental heterosexual families have been producing psychotic individuals and individuals with all sorts of sexual identity disorders.

Psychoanalysis maintains the creation of sexual orientation based on relational and imaginary processes. Since sexual identity in human beings is built in the unconscious, there is not a corresponding identification between girls and the mother and boys and the father. Parents' sexuality or sex do not guarantee anything when it comes to their children's sexual choices. The best example: homosexual children are born to heterosexual parents.

The truly important aspect here is the fact that the demand for civic equality regarding homosexual marriage and homoparental families reaches the definition of democratic society itself. This is where the lack of an up-to-date political discourse is exposed. In spite of the great need to address these new phenomena, Latin American politics have fallen behind in terms of legislating in this regard as a result of the reluctance to confront *de facto* powers such as the Catholic church. Catching up on issues raised by bioethics is one of the pending tasks for those who consider themselves liberal, left-wing or, at least, non-conservative. Failure to get up-to-speed on the political debate by moving the controversy to the last century ignores the kind of society citizens want to be.

The process to achieve the same rights for heterosexuals, homosexuals, bisexuals and transsexuals is already in motion, and nothing will stop it. Any political discourse failing to seriously incorporate these topics is caught in the past. What we need is work with symbolization, because political discussion falls, to start with, within the sphere of the symbolic. Although the scenario where people attempt to earn their autonomy and make a living is changing, we can no longer think about people as mere citizens. We need to conceive them as individuals, with all the psychic and symbolic connotations that involves. Now well, the term "individual" is a concept so complex, so imbued with philosophical tradition that, when it comes to politics, people prefer to only speak about citizens, stakeholders or agents. But we must not abandon the notion of the individual. On the contrary, we need to vindicate the individual and talk about subjectivity. "However, what really matters is not to simply reject subjectivity on behalf of science or to affirm it on behalf of poetry; it is to delve into subjectivity in a serious manner. This seriousness assumes understanding the extent to which current subjectivity is hurt and mutilated; and this understanding means delving into subjectivity, not to praise its deep meaning, but to appreciate the damage caused; it means seeking and discovering the objective social configurations that suffocate and oppress the individual" (Jacoby: 1977).

What is plausible lies within the social imaginary. The social imaginary is the spectrum of senses and meanings handled by a given society, it is the framework from which individuals can interpret their reality. For changes to become part of the social imaginary, a collective symbolic elaboration is required to allow for a transformation. That is the task of politics or, if you will, of political social communication. Before the criticism of the instrumentalist vision of politics, we must accept that there is no "objective solution" to many of the contradictions of capitalism. Recognizing that there are no objective solutions requires an ongoing definition and elaboration of the objectives society desires. That is what politics is about.

Placing the requirements of human care in the center of the public agenda raises the need to reshape the sphere of work. Super demanding alienated work with no regard for personal

development and family care needs affects both men and women. In spite of the significant changes in the workforce and the nature of work itself, labor policies have not changed much, and the labor world and expectations regarding work schedules continue to be designed as if men had a wife at home. Quality of living, for both men and women, relies on having somebody next to them: a partner, loving support, a friendly companion or a paid person assisting in childrearing and dependant care. The balance between family and work requires a major overhaul, which involves something more than making schedules flexible. Failure to develop social human care options means the procreation/production of human beings is not taken seriously.

A new social investment in families is required so individuals can invest time and resources in family life. This particularly involves a major commitment by public policy-makers, businesspeople and politicians to encourage new patterns of male responsibility in the domestic sphere. Integrating work and family life is key to civic sustainability. Trivializing human care work and the misnamed domestic work continues to be a form of evading one of the basic conflicts between the sexes. This conflict has an impact on relationships between men and women, with high costs for everyone. That is the reason why María Jesús Izquierdo has clearly stated that the issue of family-work reconciliation is the issue of reconciliation between men and women, and if family life and the labor/public life are not reconciled, men and women will not reconcile.

All this has to do not only with the father deficit, new reproductive technologies and homoparental families, but with a structural readjustment: a different understanding of the human condition and the relationships between men and women. That is where the idea of gender equity is headed. It is fundamental for democratic life to recognize that the actions of citizens expand and transform the margins of what is traditionally considered acceptable or moral. Laws regulating coexistence are the concretization of those conceptions. That is why when society changes and laws fail to reflect those transformations, social order becomes a conflict. On the other hand, when changes in ethical aspirations and behaviors are recognized, legal processes consolidate social advancement. Thus, the plurality of social life is not only made up of new cultural transformations and subjectivities, but also of public policy and legislative changes based on the principles of equality and freedom.

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## **THE DEMOGRAPHIC TRANSITION IN LATIN AMERICA: IMPACT AND CHALLENGES FROM WORK AND REPRODUCTION<sup>61</sup>**

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### **Introduction**

The demographic transition model describes the main features and changes that have occurred in human populations over the course of the last two centuries, since demographic data sources were developed in every country. European populations were the first ones to experience mortality and fertility declines. Latin America differs from its predecessors in two areas: the timing of the demographic transition and the deep social inequality characterizing this continent.

During the last part of the last century, European countries in general gradually began to shift from the first to the last demographic transition stage, with many of them having reached below replacement fertility levels, with null or negative growth rates.

Most Latin American countries, on the other hand, only initiated the second transition stage as of 1940. At the time they had mortality rates similar to those in Europe in 1900, but their fertility rates were higher than those in the European populations of the old regime, which led to annual population growth rates of 2-3%. Most Latin American countries reached low fertility levels in the 1980's.

As a result of the above, the demographic transition in Latin America shows significant differences compared to that in Europe. Their transition began in the 20th century, while in Europe it began in the 19th century. Another difference is the pace of the transition; it took 50 years in Latin America, while in Europe it took over a century. (Coale and Watkins, 1986; Watkins, 1990; Livi-Bacci 1990 and 1992).

Intermediate variables and those explaining population changes, which are linked to the timing and pace of the transition, also differ. In Latin America, for example, nuptiality virtually has no significant effect on the fertility decline; information dissemination processes regarding contraceptive methods are not as influenced by cultural or language borders as in Europe, but by the media and institutional politics. (Bongaarts and Bulatao, 1999; Livi-Bacci, 1990)

These differences are due to the higher level of development and technological advance existing when the transition began in Latin America, a period where sanitary infrastructure, vaccines, antibiotics and modern contraceptive methods were made available to the masses. The efficacy of these sanitary and health technologies caused demographic changes to occur faster and generate a strong macrostructural impact on these societies. Mortality declined dramatically and life expectancy doubled from 35 to 70 years in a five-year period (Livi-Bacci, 1992). A mortality decline due to infectious diseases occurred and there was an increase in mortality due to heart diseases, cancer, diabetes and violence, all of them disabling and involving time and care, and the continent has begun an imminent and accelerated aging process (Gomes, 2001).

The average number of children per woman decreased to less than one half in less than 30 years, from more than 6 to less than 3 children in average.

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<sup>61</sup> In collaboration with Nelson Flores and Marisol Luna, FLACSO Mexico.

These deep and accelerated population changes had consequences on all aspects of Latin American societies. At present virtually all children born survive to adulthood and old age; women survive until the end of their reproductive life, but have fewer children and motherhood is concentrated in a short period: from ages 20 to 29 (Tuirán, 1998; Gomes, 2001). These results of the demographic transition and women's practices reduced the time they need to devote to reproductive and household work. On the other hand, surviving to old age allows grandparents to get to know, and share with, their grandchildren, which encourages the division of grandchildren care and support to their sons/daughters' household work<sup>62</sup>. Paired with technological advances and the increased division of household chores with men, all these essentially demographic factors contribute to freeing women from reproductive work and their engaging in other activities, particularly work-related ones (MacInnes and Pérez, 2005).

### **Structural inequality in Latin America and the Caribbean**

Latin America is the continent with the highest levels of socioeconomic inequality in the world (World Bank, 2000). Consequently, the pace of the demographic transition was different within and among the different countries. Women in Bolivia, Nicaragua and Honduras survive fewer years and have more children. And in all these countries, poor, indigenous and less-educated people are the ones facing the biggest gaps in terms of mortality and fertility declines.

The different timing of the transition process in these societies shows differentiated demographic trends leading to the implementation of population policies that are even contrary. In the last part of the last century, several Latin American countries adopted contraceptive family planning policies, while different countries in Europe adopted openly pronatalist policies along with support for women's entry into the labor market and participation in the public sphere. Differences between policies are consistent with the stage of the demographic transition in each country and the socioeconomic characteristics of families and populations in each society (Gomes, 2001).

Therefore, in the case of Latin American countries it is essential to know in more detail the form and timing of the demographic transition process and its interrelation with the availability of reproductive technologies, policies and institutions empowering the reconciliation of productive and reproductive work. The analysis of these processes would allow us to understand their consequences and future evolution perspectives.

### **Synergies between the Demographic Transition and Social Inequality**

In order to explore the potential synergies between the demographic transition stages in each country and their relationship to poverty and social inequality, we have included a graphic analysis of several indicators related to these spheres.

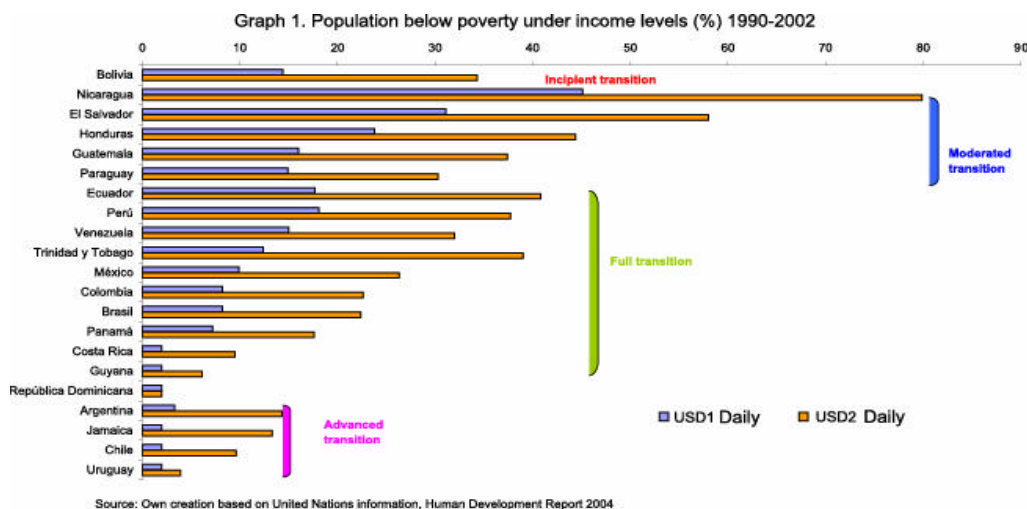
### **Poverty and the Demographic Gap**

The incidence of poverty is closely related to each country's demographic transition stage. Graph 1 shows, on one end, that the demographic transition in Argentina, Chile and Uruguay started earlier and was more spaced, a process they are in the process of completing, following a pattern similar to that in Europe. The higher level of survival means an increased ability to plan one's life, and it also makes other generations more willing to share household work with women. These countries have also provided the best work and institutional opportunities for women, and have the lowest levels of poverty in the region.

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<sup>62</sup> In the United States and Europe, the increase in grandparents' survival has allowed for significant flows in terms of exchange of resources, supports and services with their children, which has contributed to the reconciliation of productive and reproductive work (Putney and Bengtson, 2005; MacInnes and Pérez, 2005).

Thus, on this end synergies occur between the demographic and social factors facilitating the reconciliation of productive and reproductive female work.



On the other end we find Bolivia, Nicaragua and Honduras, with the highest incidence of poverty. They are also the countries with the biggest gaps in terms of demographic transition. This combination establishes negative synergies for the reconciliation of production and reproduction, because the lower degree of development and social equity reproduces, and is reproduced by, the lower level or survival of women and other generations. At the same time, the higher fertility level found in these countries means more time is devoted to reproductive work among women, amidst bigger institutional lacks and fewer job opportunities. Reproductive work is intense and inefficient, since a lot of children are born, get sick and die, and all this work is almost entirely the responsibility of women and consumes most of their short lives (MacInnes and Pérez, 2005).

In the middle of these two extremes we have other countries in intermediate stages of the transition, with different institutional and work offers, but all of them within the framework of the strong social inequality characterizing the region. This mosaic of sociodemographic situations shows it is necessary to take into account the different mediations facilitating or hindering the reconciliation of productive and reproductive work, which assume very different patterns in the region.

### The role of gender equity in the relationship between poverty and the demographic gap

The relationship between poverty and the demographic gap is extremely suggesting for gender analyses. If precarious demographic conditions mean more reproductive work for women, women in these regimes would face strong limits in terms of getting free from some household chores and assuming productive roles, as most of their lives is devoted to raising their many children. To take into account the role played by women's autonomy in the relationship between poverty and the demographic gap, we have considered different indicators expressing women's opportunities for participation in the labor market and gender inequality in the different countries.

An indicator often used to analyze gender discrimination is the gap between male and female incomes. Gender studies have shown male income is usually lower than female income, even where there is control over the profession or job position (Chant, 1999). The analysis of Latin American countries shows income differentials between men and women do not bear a direct relationship with the demographic transition stage or the situation of poverty in these countries (Graph 2).

On one hand, in Chile and Argentina the high level of male income does not have a correlation with a high income level among women; on the contrary, the gender gaps in these countries are far deeper than those in countries like Panamá and Colombia. On the other hand, gender gaps in Bolivia and Nicaragua are clearly smaller compared to the rest of the countries in the region. This result suggests Giffin's findings (2005) in Brazil. This author highlights the fact that gender equity, measured in terms of gaps, might be affected by "the lowering of standards of living in the poorest countries and social groups, as well as men's inability to make up for their wage losses." In countries and contexts where poverty prevails, small gender gaps may simply reflect the homogeneity of poverty for men and women.



Source: Own creation based on United Nations information, Human Development Report 2004

### Female headship: between the autonomy of young women and the widowhood of older adult women

Another indicator used by some authors to approach women's higher autonomy or vulnerability situation is the increase in the proportions of female-headed households in a population.

On one hand, female-headship would be a sensitive indicator for gender inequality, as it reflects the limits to women's entry into the labor market and its effect on gender gaps. Because women in general have lower incomes compared to men, even if they perform the same job, female-headed households would be poorer than male-headed ones. However, the compared analysis of male-headed households and the use of statistical techniques have allowed us to prove that female-headed households are not necessarily associated to a higher level of poverty in households (Chant, 1999; Lusting and Székely, 1997; Gomes, 2004). Also, as an indicator of gender differentials, female headship would have the same limits as income gaps between men and women.

Thus, the increase in the proportion of female-headed households may reflect a higher degree of autonomy and participation in the workforce for many women of reproductive age. However, for old women it can mean the existence of multiple situations, which range from autonomy, in the case of female income earners, to abandoning children and relatives. Studies on gender and the reconciliation of work and reproduction must bear in mind this indicator is affected by the level of demographic aging associated with female widowhood and the emergence of households headed by older adult women (Young, 1987; Uhlenberg et al., 1984; Gomes, 2001). In other words, female headship can be seen as mediating between the demographic transition stage in each country and the opportunity structure available to women, considering the age structure of female heads of household. In a demographic analysis, countries further ahead in the demographic transition would be

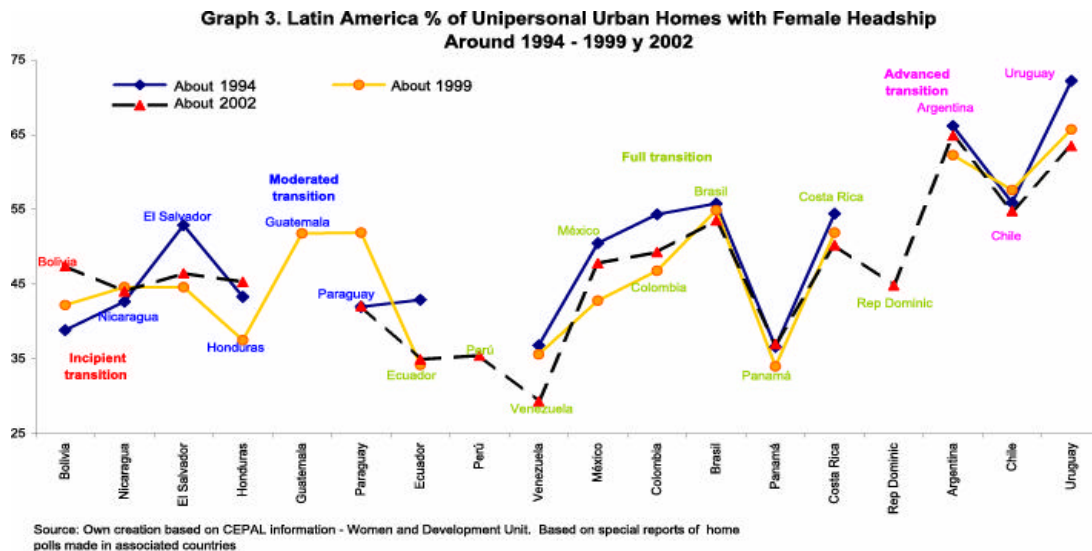


expected to show the highest proportions of households headed by females, basically older adult widows.

**Population aging and female headship**

Female headship increases proportionally with older ages, particularly as a result of the widowhood of women, who generally survive longer compared to men. In many cases of widowhood all the children have already left the parental home and older adult women live alone in one-person households (Young, 1987; Gomes, 2001). According to this trend, countries in the most advanced stages of the demographic transition would be expected to show larger proportions of households headed by older adult women, and a broader participation of these in one-person households, particularly in urban areas, where less poor countries have retirements and pensions available to these older adult women so they can support themselves.

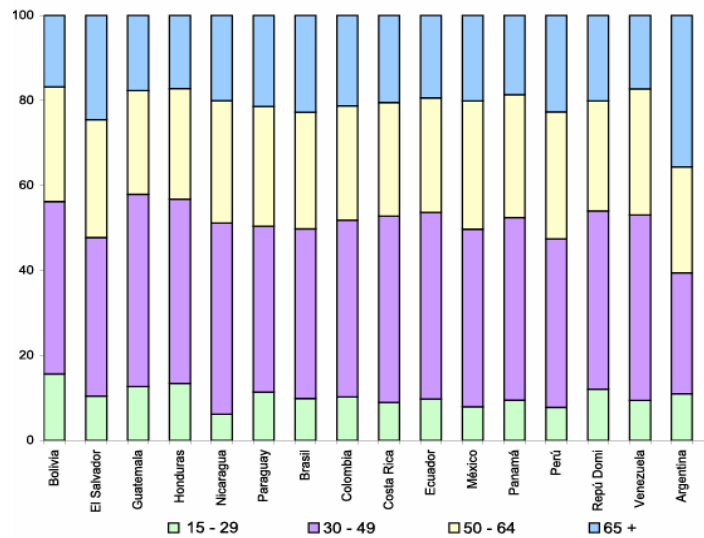
In fact, over one half of single-person households in urban areas in Uruguay, Argentina, Chile and Costa Rica are headed by women. These countries are also in advanced stages of the demographic transition. However, no such obvious relationship exists in countries in the intermediate or incipient transition stages. Brazil is in the former group as a result of the generalization of the pension system starting with the 1988 Constitution, which has favored women more (Beltrão y Sugahara, 2005). Venezuela, Ecuador, Peru and Panama show the smallest proportions of female-headed single-person households (one third), but they are not the countries with the biggest demographic gaps. In Bolivia, which is in an incipient stage, women head almost one half of the single-person households in urban areas (Graph 3).



Thus, the effect of aging on the increase in the proportion of older adult female heads of household living alone is only visible in urban areas in those countries in the most advanced stages of the demographic transition, which are the least poor. However, countries in the intermediate transition stages show a diversity of situations whose mediations are worth exploring. These countries also have limited opportunity structures, which means the aging process involves more vulnerabilities for women and the family.

In fact, female headship varies by age, in a clear correlation with the aging process: in Uruguay, Argentina and Chile the proportions of female heads of household over 65 years of age account for 30% of the total number of female-headed households, while in Bolivia, Guatemala, Honduras and Venezuela older adult women do not even account for 20% of female-headed households (graph 4).

**Graph 4. Female and Male Headship by age**



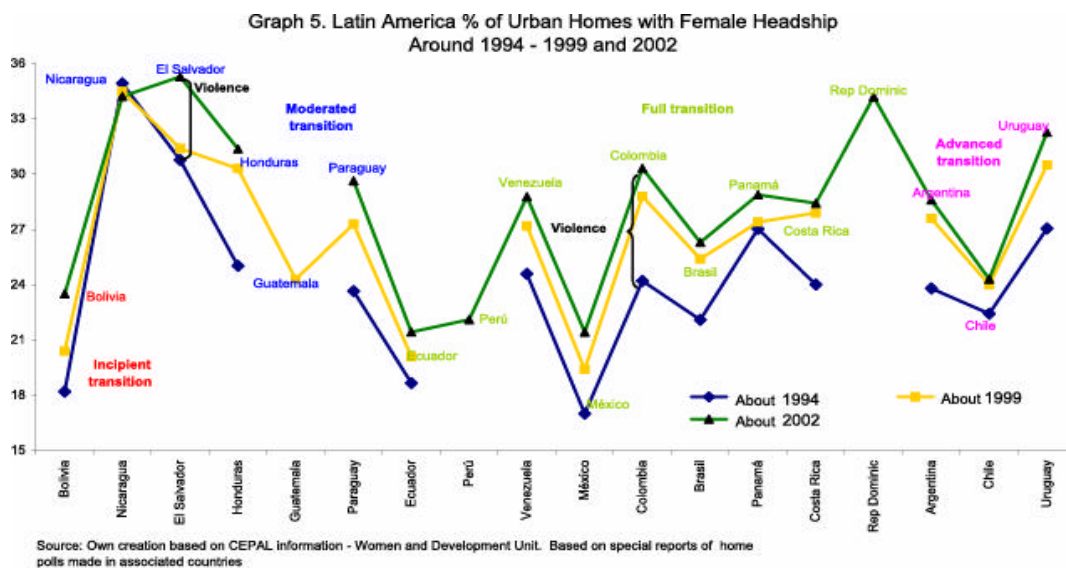
Source: Own creation based on CEPAL information - Women and Development Unit. Based on special reports of polls made in associated countries

### Work and female headship as indicators of women’s autonomy

Female headship as a traditional indicator of gender discrimination would reflect the increased autonomy and work of women of active and reproductive ages. In this case, the largest proportions of female headship would be expected to match the largest proportions of women participating in the labor market.

However, the highest female participation rates are found in Uruguay, one of the countries with the smallest demographic and social gaps, but also in Haiti, the country with the biggest gaps, where 60% of women work, followed by Colombia, Nicaragua, El Salvador and Bolivia, where one half of women are in the labor market. On the other extreme, Ecuador, Peru and Guatemala have the lowest female participation (less than 40%). Thus, the relationship between poverty and the demographic gap does not seem to have clear connections to women’s exclusion from the labor market. No clear pattern is observed either when compared to male participation rates, considering the lowest male participation rates are found in Uruguay and Guatemala. There is no doubt men and women’s entry into the workforce measured in terms of aggregated proportions conceals a wide diversity of precarious jobs in the poorest countries, as well as retirement with pension at older ages in those countries with more universal social security systems.

On the other hand, the analysis of aggregated proportions of female headship shows these bear no direct relationship with the demographic transition stages. In urban areas, the highest levels of female-headed households are found in many poor countries in incipient transition stages: Haiti, Nicaragua, Bolivia and Nicaragua. On the other extreme, Uruguay has high female labor force participation rates and is in a very advanced stage of the demographic transition, but also has a low rate of female-headed households.



One of the significant results to bear in mind is the fact that some countries with a civil or armed conflict and international migration show the largest proportions of female heads of household (Colombia and El Salvador). In the case of Brazil, it is worth mentioning that it is one of the countries with the highest rates of female and male mortality due to accidents and violence, and also that over 40% of female heads of household ages 40 to 59 are widows, which reflects the need to reconcile productive and reproductive work in case of sudden absence of the partner or provider.

Thus, migration and mortality among young males, as well as separations and divorces, appear as probable demographic factors altering the marital status of female heads of households, even those of reproductive age, in those countries with the biggest demographic gaps. The absence of a woman's partner and his support to share household chores and resources is the result of reasons beyond women's autonomy. For this reason, this can be an indicator of vulnerability for the reconciliation of productive and reproductive tasks by these female heads of household, which can be a significant issue, particularly in the poorest countries in Latin America and the Caribbean.

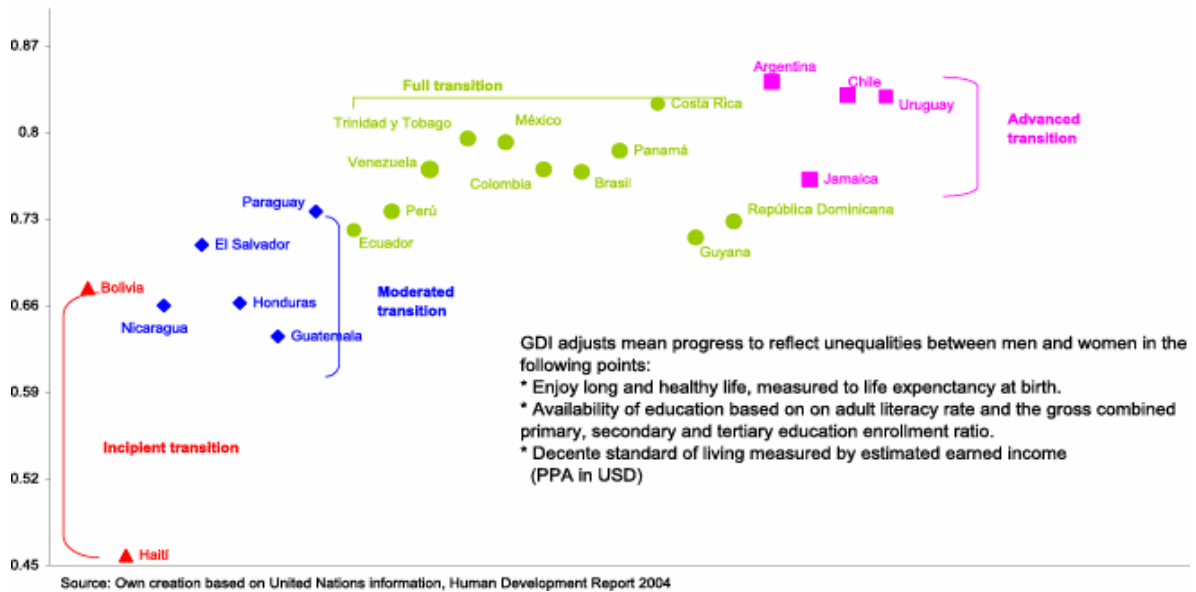
In summary, female headship has different meanings: in the case of women of reproductive age it can be related to the absence of the partner due to death or migration, in addition to women's choice to separate or be a single mother. In the case of mature women it can reflect widowhood, which fosters the proportional increase in single-person households and, for that reason, it can be used as an indicator of the aging process in societies in more advanced stages of the demographic transition. However, in those countries in incipient or intermediate stages, it is important to further explore many other aspects of the opportunity structures available to women of reproductive age, including the issues of early widowhood and male migration.

On the other hand, female headship and unpaid female work are not enough to reflect the degree of women's autonomy in unequal societies with labor markets predominantly precarious such as Latin American ones.

An aggregated indicator better expressing the heterogeneity of gender equity is the Gender Development Index (GDI) estimated by the United Nations, which adjusts the mean progress of inequalities between men and women through a combination of sociodemographic indicators. The following aspects are considered: enjoying a long and healthy life measured by life expectancy at birth; the availability of education based on the adult literacy rate and the gross combined primary, secondary and tertiary education

enrollment ratio; and a decent standard of living, measured by the estimated earned income (calculated based on the purchasing power parity in US dollars).

Graph 6. Gender Development Index related to Gender 2002



This estimation clearly shows how this combination of factors bears an almost direct relationship with the demographic transition: Argentina, Chile, Uruguay and Jamaica show the highest GDI levels, and on the bottom end we find Haiti, Bolivia, Nicaragua, Honduras and Guatemala, which are countries in incipient or moderate transition stages with much lower GDIs.

According to these indicators, gender equity is linked to the different opportunity structures available to women.

Women’s position in the household, whether head of the household, spouse or daughter, depends on the way they use this opportunity structure and the decisions they make throughout their life regarding education, employment and reproduction.

The larger proportions of households headed by females of reproductive age would be mediated by multiple sociodemographic factors, including the higher levels of survival and widowhood; male migration; higher fertility control; the increase in the number of divorces; children born out-of-wedlock; labor force participation and female income, as well as the availability of resources and family and institutional supports for women to share household chores. The inclusion of the gender perspective in the poverty/demographic gap binomial needs to be explored in further detail in this region, considering the multiple intermediate factors and events in this relationship, and according to women’s age, which determines the occurrence of different events throughout their life trajectories (Elder, 1975; Hareven and Masaoka, 1998; Tuirán, 1998; Gomes, 2001).

**Demographic transition, age structure and life trajectories**

In this paper we lay emphasis on one clearly emerging result: it is rather evident that the demographic dynamics has an impact on observable gender differences, as well as on families and public policies. And those impacts are different between generations of women with increasing survival rates and experiencing different opportunity structures throughout their life.

As far as gender studies are concerned, it is worth highlighting that the higher level of survival to old age means men and women have additional years of life expectancy and spend more of their lifetime together, but many get divorced or migrate and some do not

survive. All these factors also play a role in the increased number of female-headed households. On the other hand, lower fertility rates translate into a shorter period of women's lives devoted to childcare.

The life course perspective allows us to further explore the impacts of these demographic changes, along with social and economic changes in families over time. For many women, for example, the onset of adult life represents the gateway to motherhood and childcare. But in social groups and countries with higher maternal mortality rates, orphanhood or the reconstruction of families with children from previous marriages can be phenomena interfering with family life and gender relations. Lower fertility rates allow for better quality in childrearing, which means more care and education, and for women it means the possibility of devoting less time to childrearing. At the same time, however, for old women it means fewer children available to provide care and support. Grandmothers, mothers and grandchildren spend more of their lifetime together, but that does not necessarily mean they share at home. The aging process plays a role in the delay and increase of widowhood, which promotes an increase in the proportion of single-person, single-parent and extended households headed by older-age women (Gomes, 2001).

In some cases, adult women are forced to head their households as a result of divorce or their partner's death or migration. These phenomena have an impact on relationships between genders and generations, as these sociodemographic events fall within the framework of opportunity structures. For example, remittances and alimonies or the availability of pension or retirement systems can make a big difference in these women's situation of poverty (Chant, 1999; Gomes, 2001).

Public budgets and policies also play a significant role in demographic results and the availability of generations affecting the reconciliation of work and reproduction. Maternal mortality, for example, is clearly determined by access to secondary and tertiary care by women, and orphan children are more likely to die early compared to non-orphans. Education systems and childcare centers make it easier for fertility declines to effectively translate into better capabilities for children and women freeing themselves from household chores. And, finally, failures in social security, pension and health systems in Latin America are related to precarious working conditions and incomes for men and women, and may partially explain gender gaps in the labor market in many Latin American countries.

Therefore, far beyond gender inequality, social inequality, the institutional opportunity structure and the availability of generations in the family we find issues that play a mediation role in the relationship between poverty and the demographic transition. All these factors also play different roles between generations and in terms of the possibilities available for women to reconcile productive and reproductive work in each stage of their individual life course.

The life-course perspective takes into account events taking place depending on the age in men and women's life trajectories, which express historical experiences in each generation, depending on their age and the historic moment in which they experienced the transition to adolescence, adulthood and old age (Elder, 1975). The following diagrams describe the different stages characterizing women's life trajectories and following normative patterns and diverging trajectories in the life course.

The early reproductive stage includes the reconciliation of school and sexual relations. Most women start going to school, help with household chores, get married and have children and, at present, they survive to old age with a partner until he dies and they become widows.

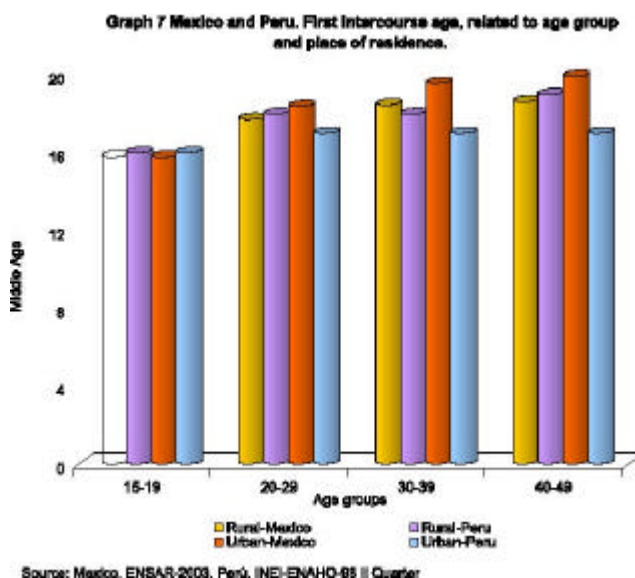
Some women, on the other hand, experience diverging trajectories that include teenage pregnancy, female labor, divorce, intergenerational co-residence, retirement and disabilities.

These less common events are the ones more frequently associated with problems in the reconciliation of production and reproduction.

### **The transition to sexuality: reconciliation with the school, marriage and motherhood in the early stages of the life course**

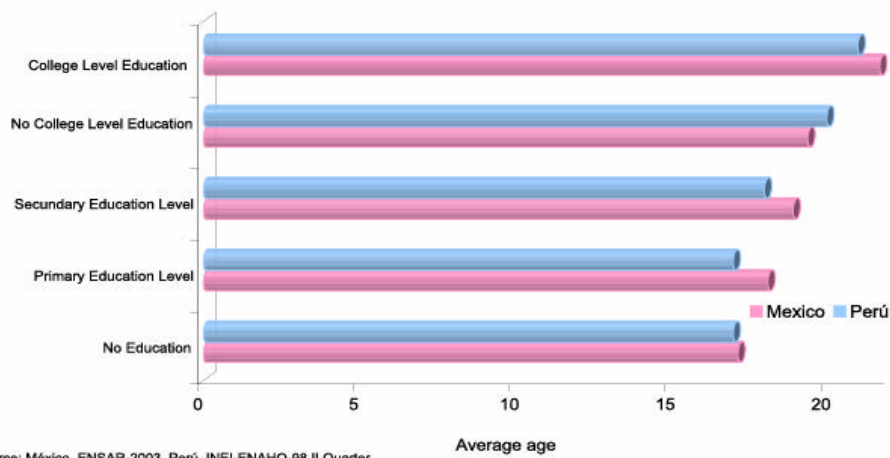
The onset of sexual relations can be reconciled with the use of contraceptive methods or teenage pregnancy; permanence in school or school dropouts; marriage, early abortion or single motherhood. Getting a college education can delay the onset of work life, courtship, marriage and motherhood, as well the onset of sexual relations and the use of contraceptive methods.

Graph 6 shows how in countries in similar stages of the demographic transition, such as Mexico and Peru, the onset of sexual relations among new generations is taking place increasingly earlier. The age at first intercourse has declined from one generation to another, from around 19 to 16 in average. However, different patterns by area of residence can be observed between countries. Mexican women from rural areas, where indigenous groups are concentrated, start their sexual life more than one year before those in urban areas, although that difference has been declining between generations, while this differential has virtually disappeared among young women ages 15 to 19, and all of whom start having sexual relations at age 15 in average. In Peru we find an opposite pattern: historically, urban women have started having sexual relations two years before those in rural areas, although both converge at age 15 approximately.



Differentials in age at first intercourse are even more significant by education level. In both countries, women with no schooling start their sexual life at age 17 in average, and permanence in school bears a direct relationship with the delay of sexual initiation. Women with university studies delay the onset of sexual intercourse up to five years more compared to those with no schooling and, in average, they wait until they are 22 to start their sexual experiences.

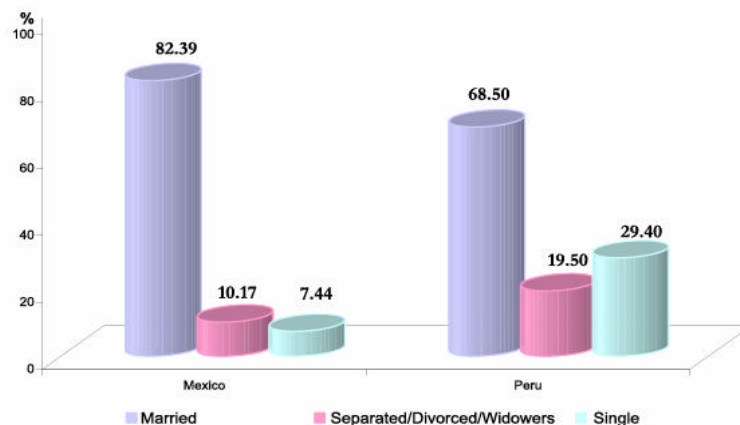
**Graph 8. Mexico and Peru. First Intercourse by Education Level**



Source: México. ENSAR-2003. Perú. INEI-ENAH0-98 II Quarter

These different patterns between countries are related to other transitions to adult life, such as marriage and motherhood. In Peru, a country where young women from urban areas start having sexual relations at an early age, we also find that almost one third of single mothers and one in every five separated or divorced women uses contraceptive methods; while in Mexico only around 10% of women not in union use contraceptive methods. Although the majority of women in union in both countries use methods, in Mexico fertility control through modern methods and the reconciliation of reproduction and other activities take place almost exclusively within the union (82.4%), while in Peru the majority of women in union use methods, but the proportions are smaller compared to those in Mexico (68.5%), and fertility control as a way of reconciling reproduction and other activities, whether recreational or education or work-related, also takes place outside the normative trajectory of marriage.

**Graph 9. México and Perú. Contraceptive methods uses by marital status**

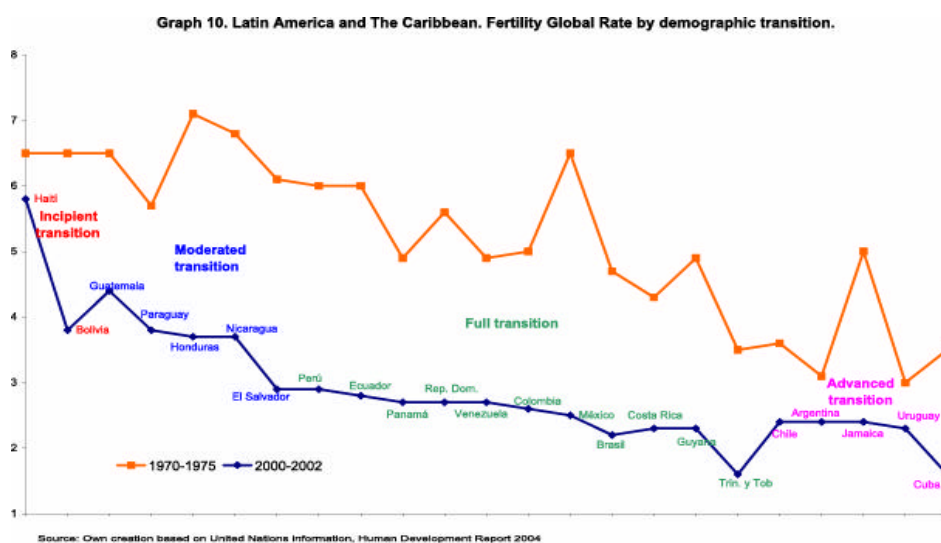


Source: México. ENSAR-2003. Perú. INEI-ENAH0-98 II Quarter

The analysis of these trajectories, both normative and diverging, indicates some gender patterns, as well as patterns in successive generations. For example, the reconciliation of care and children's education for women without a partner and working outside of the household is related to a heavier load of household work for single or separated mothers, who do not have a spouse to share it with (Chant, 1989), and also to children more likely to perform badly at school (Giorgulli, 2004).

### The transition to motherhood

Fertility in almost all Latin American countries has declined from more than six to less than three children per woman in only two decades, although at different paces between and within countries. In El Salvador, Guatemala and Haiti, women still have four children in average, while Costa Rica, Puerto Rico, Peru and Brazil virtually achieved the replacement level of two children per woman in different stages. In Argentina and Uruguay, which are countries in a more advanced stage of the transition, women have almost the same number of children as women in Honduras and Nicaragua. Therefore, by approaching the replacement level, fertility rates among Latin American women already show an evolution comparable to those in European countries, where the earlier onset of the demographic transition, like in Argentina and Uruguay, did not involve a fast reduction in fertility to levels below two children per woman. But countries having experienced rapid changes, like Peru and Brazil, can quickly achieve those levels.

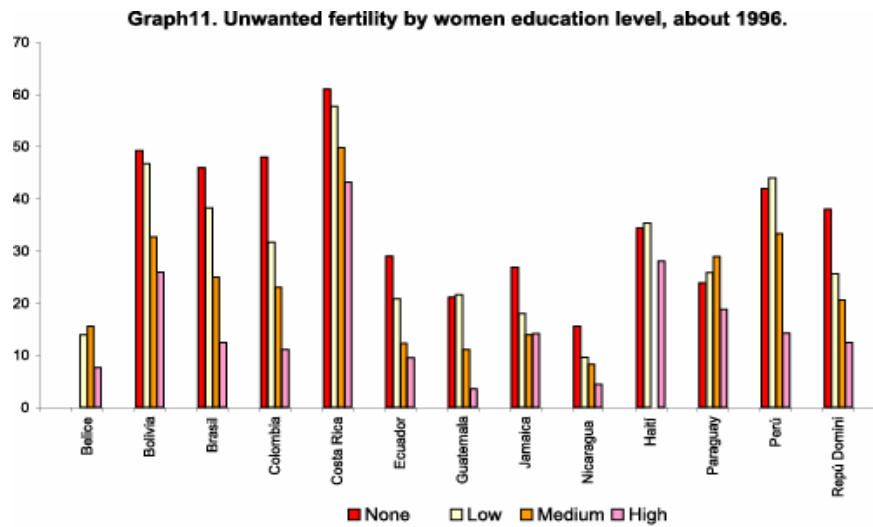


Despite the achievement of such low levels, some countries still show high proportions of unwanted children. Unwanted fertility is closely related to the mother’s level of education, and in all the different countries the proportion of unwanted children and unwanted pregnancies is higher among women with low education levels or no schooling at all, compared to those with higher education levels. However, countries with higher average education levels among women do not necessarily have lower unwanted fertility rates, such as the atypical case of Costa Rica, where more than one half of children seem to be unwanted or unplanned. In Nicaragua, Guatemala and Ecuador, on the contrary, percentages of unwanted children are below 20%, while in countries in different stages of the transition and with more social inequality, such as Brazil, Colombia, Peru and Bolivia, the percentage of unwanted fertility exceeds 40%.

The level of unwanted pregnancies does not bear a relationship to the level of demographic transition or poverty in each country, but it is strongly related to women’s lower education levels.

Therefore, despite effective fertility control and the massive use of contraceptive methods in most Latin American countries, there is still a large number of women who have not been able to consolidate practices allowing them to plan their pregnancies and reconcile their productive and reproductive roles, something particularly important among those with fewer education opportunities.





Source: Own creation based on CEPAL information - Women and Development Unit. Based on special reports of home polls made in associated countries

### The transition to old age

Adult women (and men) survive beyond age 40 and spend more of their lifetime together and with their children, until these get married or leave the parental home to live with a partner. New life course events and experiences take place after 40: most women get to know their sons/daughters-in-law and grandchildren, and some of them even get to know their great-grandchildren.

The cohorts of today's older adults started a family before the 1960's under universal matrimonial regimes, but also in a demographic context of mortality reduction and very high fertility. With the increase in life expectancy, many of them survived to old age, and at present they coexist with their numerous children (Gomes, 2001). Those becoming widows or widowers had a chance to marry a second time. Thus, at present over 70% of older adults are in union, and approximately 20% are widows or widowers. Single older adults only account for a small percentage, particularly in Bolivia, Brazil, Mexico and Guatemala, which can be considered almost universal marriage contexts. (Graph 12).

In Uruguay, Chile, El Salvador and Panama, on the other hand, over 10% of older adults are single. Countries like Uruguay and Chile, which are less poor and have older populations, can be considered contexts where many of these old male adults chose not to marry and grew old being single. However, the populations of El Salvador and Panama are still very young. These are countries having experienced armed conflicts or invasions, as well as internal migration, which means that, at different points in time, many men did not get married. This hypothesis is confirmed upon analyzing the coincidental high proportions of divorced older adults in Panama, Nicaragua and El Salvador. They also coincide with the high proportions of female headship in these countries.

Marital status, analyzed as an expression of these men's marriage trajectories, is influenced by historic facts characterizing the societies they live in. A history of conflicts and migration leads to contexts not favoring marriage for cohorts of marrying age, both men and women. This observation refers us to the discussion of the effect of conflictive and high-migration contexts on family life starting in very early stages of the life course, which results in households headed by adult and older adult women, and also in households of old men living alone.

Despite having been married for many decades, older adult women often reach old age as widows. Around 40% of them are widows, and another 40% are married. This is due to the higher level of female survival and the death of husbands before women, who are more

likely to survive and become widows at an old age. On the other hand, the proportions of single older adult women are twice as high compared to men: in almost all the different countries one in every ten women reaches old age being single. The exceptions are Paraguay, with 22% of single older adult women, followed by El Salvador, with 18%. In these countries, in addition to Peru, we also find over 10% of divorced older adult women. These figures are related to the hypothesis of conflicts and migration with male participation. They also result in an unfavorable marriage market for women in these generations.

In summary, it is during old age that women reconcile life as a couple in older adult households where all the children have already left (the so-called “empty nests”). These couples exchange supports with each other, and also with their sons/daughters and grandchildren. However, it is also in this stage that diseases, depression and disabilities occur, particularly among women. Older adult women face new challenges, including the reconciliation of their own health care and their relatives’ health, support for their sick or disabled spouses, or sons/daughters who are divorced, unemployed, have no resources or live with AIDS and, often times, caring for their grandchildren to support their sons/daughters’ working out of the household. This means that, at the end of their life course, women can experience an intensification of household chores and their reconciliation with activities to support the family network and other generations.

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**SESSION 3:**

**RECONCILIATION POLICIES: GLOBAL PERSPECTIVES**

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## WORK-LIFE BALANCE POLICIES IN OECD COUNTRIES

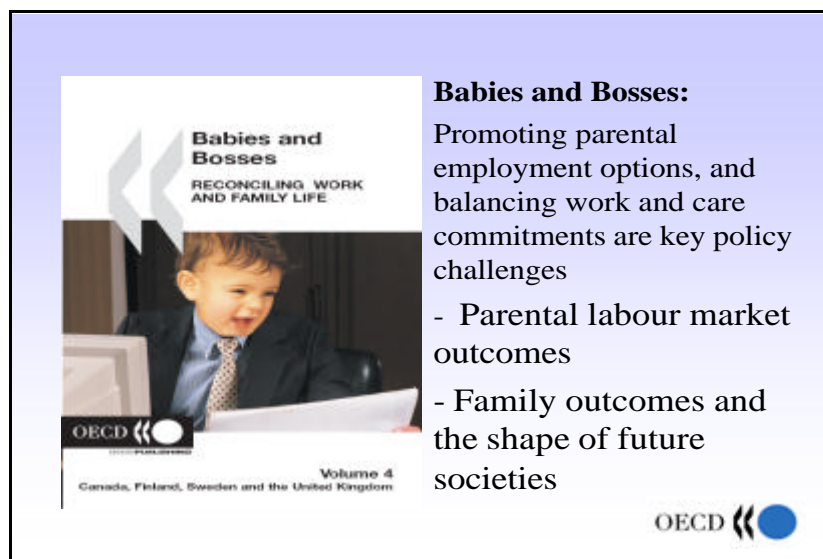
**WILLEM ADEMA**

*Senior Economist  
OECD Social Policy Division, Paris*

Good morning or good afternoon, I hope that I come through loud and clear, I understand there are interpreters in the room so if I speak too fast I hope that one of these interpreters will start jumping up and down and I will reduce the pace. I understand that you have all received the power point print out which is normally a traditional recipe for people falling asleep so under normal circumstances I am not in favour of these things being distributed before the presentation. However, in this case I think it is probably handy because I understand there is no screen with the presentation on it.

### Introducing the Babies and Bosses reviews

Looking at the PowerPoint presentation I see the picture of the last cover in the series of *Babies and Bosses* reviews and I should tell you a little bit about the history of this work. Back in 1998 the Ministers responsible for social policy of OECD countries met in Paris and said that they thought the OECD should do some work on children and on families. Mindful of the implications of parental market behaviour for families and for children, we designed a project on the reconciliation of work and family life which is a key policy issue in many OECD countries, as it is in the countries that are represented at this conference, even though the focus in approach may be very different. Work and family reconciliation issues are important because they affect parental labour market outcomes, and the extent to which parents can pursue individual aspirations and pursue a career. However, it is also vital to make sure that children do not grow up in poverty. Also when combining work and family life becomes easier this may contribute to stemming the fall in fertility rates and contribute at shaping future societies for the future (this is not so much an issue for Mexico, as it is for many other OECD countries).

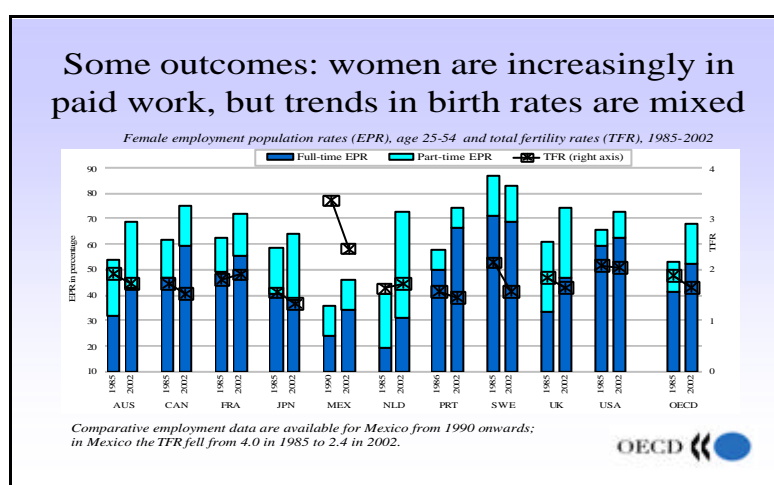


What did we do in the Babies and Bosses reviews? We looked at the labour market outcomes in the countries that participated in the review and at the outcomes in terms of family formation and then we tried to explain parental work and care choices by looking at three broad policy areas: child care support policies, tax benefit policies (does it actually pay for parents to work or does it pay for parents to withdraw from the labour market) and

do workplace practices facilitate parents to engage in paid employment? Are employers accommodating to parents, to look after their family commitments? To study these issues comprehensively, one has to go into some detail of country systems which does not facilitate a comparison of all 30 OECD countries at one time. Hence, we took 3 or 4 countries at one particular time and in every review we had at least one non-European country. The 13 countries that participated over time in the reviews are: Australia, Austria, Canada, Denmark, Finland, Japan, Ireland, the Netherlands, New Zealand, Portugal, Sweden, Switzerland, and the United Kingdom. We have experienced that the returns from doing yet another review are diminishing but we will produce an overview issue with key indicators on work and family life in the beginning of next year. Also, we do not want to lose the knowledge we've built up in the area and we will prepare an overview issue in the first half of 2006 and establish an on-line database on family policies and family outcomes late 2006. Earlier this year in March, April we had another meeting of Ministers responsible for social policy and they have decided that we should focus our work a little more on child welfare issues. We still have to decide how exactly that work is going to be carried out but we will remain active in the area.

### Trends in fertility rates

As you can see from the chart below, in all OECD countries the proportion of women in paid employment is increasing. There is probably a mixture of reasons for that, there is an economic necessity; there is also a dramatic change in attitudes among women towards participating in the paid labour force but at the same time the pattern of family formation differs very much across countries. In Mexico and I expect in many Latin American Countries, birth rates have dropped very sharply but from a very high base. In many OECD countries the birth rates have tended downwards now for twenty, thirty years and in some countries, particularly in Japan but also in Portugal birth rates are low at about 1.3, 1.4 children per woman. There are only a few countries which have managed to buckle that trend, the Netherlands is one of them, France another. Sweden (in the chart here) shows a considerable decline in the fertility rate but the Swedish fertility rate is unusual in that it also rates around 1.6/7, level for the last twenty years or so. The other notable exception is the United States where the birth rate hasn't declined as strongly as in many other European countries. However, there is no clear link between full time employment, part time employment and birth rates. In the Netherlands part time employment is very high and fertility rates have gone up, but in the UK, another country where part time employment is significant, fertility rates fell. Overall, it seems that it is easier now than in the past to combine work and family life particularly in certain countries as Sweden, other Scandinavian countries, and of course, France.

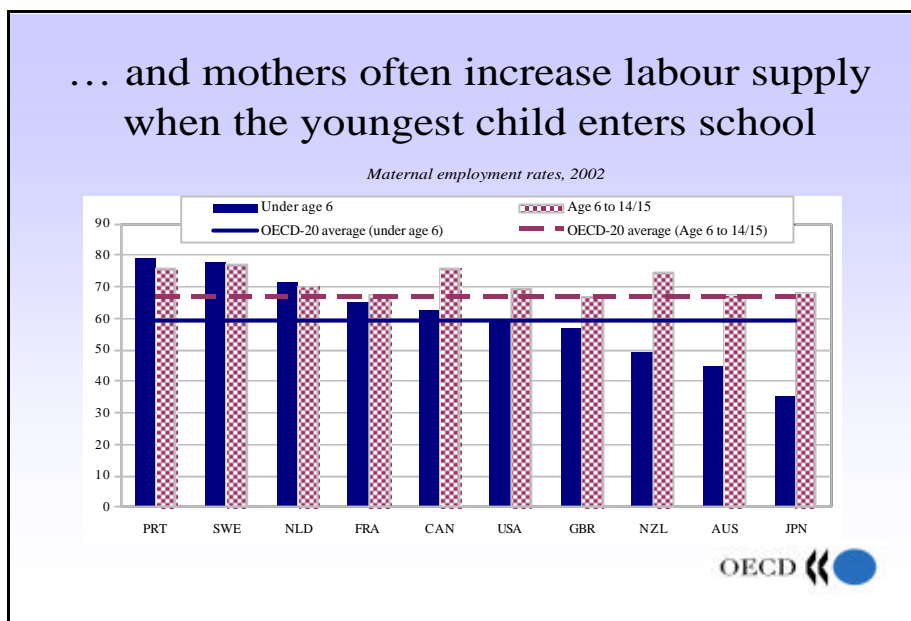


### Maternal employment patterns

The next sheet tells you a little bit about how the age of children affects female employment patterns. In some countries, but not in all, the age of the youngest child is a crucial factor in

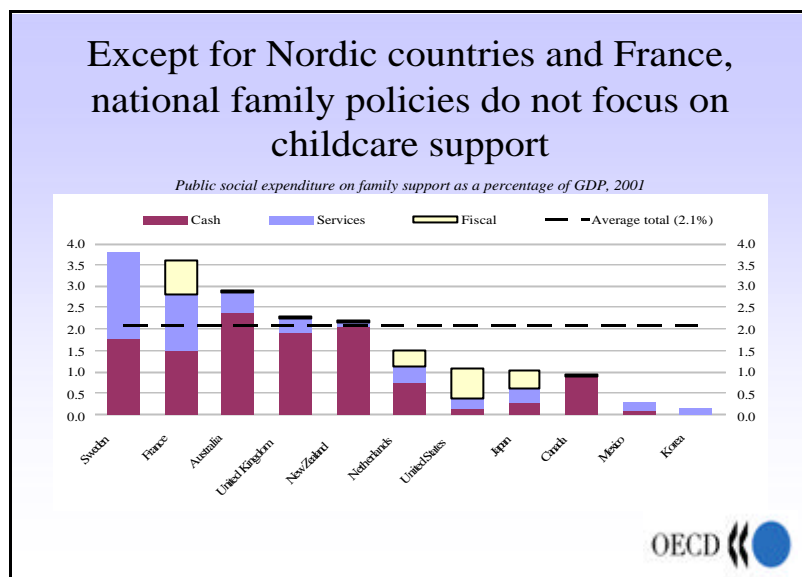


determining whether a mother works full time or works part time. As you can see from this chart on sheet number 5, particularly in the UK, New Zealand and Australia and also Japan, if a child goes to school then the chances that the mother, will be in work, are much higher than when that child is not yet of school age. The underlying dynamics may differ. For instance, I know that in Australia and New Zealand a lot of mothers work part time during the early years and increase their labour force participation in hours when the child goes to school at age 5. In some other countries the move is from not working at all to working part time or working full time. Generally it is also true that mothers with many children are unlikely to engage in the paid labour force but the difference in employment patterns between one or two children is not always that big across countries.



**Family Policy responses across the OECD area**

Let us now consider the very different family policy responses across OECD countries. The Chart below shows financial support for families provided by public authorities either in cash benefits (e.g. that could be a child allowance, income support during parental leave), in-kind benefits (or services), i.e. the direct provision of child care, or support through the tax system which happens a lot in France (where the tax system favours families with children) or in the United States. (Not all support for family is included, a lot of public spending on health or housing also benefit families but not exclusively, so I haven't included such support in this particular chart.) If you look on the left hand side there of the chart you can see Sweden (and the picture for Denmark would be similar) is that the majority of spending is in services. In Sweden and in Denmark there is a strong emphasis on channelling support for families with young children through family services. Cash benefits also exist and are substantial, as you can see, but support on services is even bigger in terms of net value and that helps so many parents to combine their work and family life. In Scandinavian public support is provided throughout the life-course: when you are born, the state starts to support your father and your mother to stay at home for a certain period of time on parental leave; when this expires children attend childcare facilities; then you go to school and after-school-hours-care and then you go to secondary school, and, perhaps, university. Upon retirement more support is available through pensions and elderly services, and then you die. Throughout the different stage of life there is public support for the population.



Other countries do not do that. France as you can see from the second in the left on the chart has a different mix in family support. As you may have noticed, it provides considerable fiscal support and it spends slightly less than Sweden on services and cash benefits as a percentage of GDP. This is because until recently, until 5 or 10 years ago, French policy in terms of child care or out-of-school-hours care started only when children were age 3 in Finland or in Austria support given towards families support one of the parents to stay at home during the first three years of life of the child and that affects the career pattern of many women, particularly in Finland. As for the other countries, you see very different models and you should realize that a lot of public spending in Australia and New Zealand and in the UK goes to sole parents on income support benefits, sole parents, single parents, lone parents, parents without partner. And a lot of the spending in this chart in these three countries goes to this particular group, such support also exists in other countries but is then brought in a different programme, social assistance for example.

### Family policy objectives

Next I present a concise summary of the different policy objectives governments across the OECD area have when they pursue family-friendly policies. The interesting thing is that all governments across the OECD wish to support parental choice, but there are different ways of doing so. For example, the overriding policy objective underlying Japanese policy is the low fertility rate and future labour shortages. If you look at recent developments in the UK where the government has departed from the traditional laissez faire attitude and has started to invest in childcare but also in out-of-school-hours care, the real reason why the treasury, got involved, was to fight child poverty and to fight child poverty, we will see that in a minute, it is key to get mothers in work. Gender equity is an avowed policy objective in all OECD countries but it really only plays an important role in policy development in Nordic countries and in Portugal. In other countries, it is there in policy formulation but it doesn't play an overriding role when it comes to policy design.

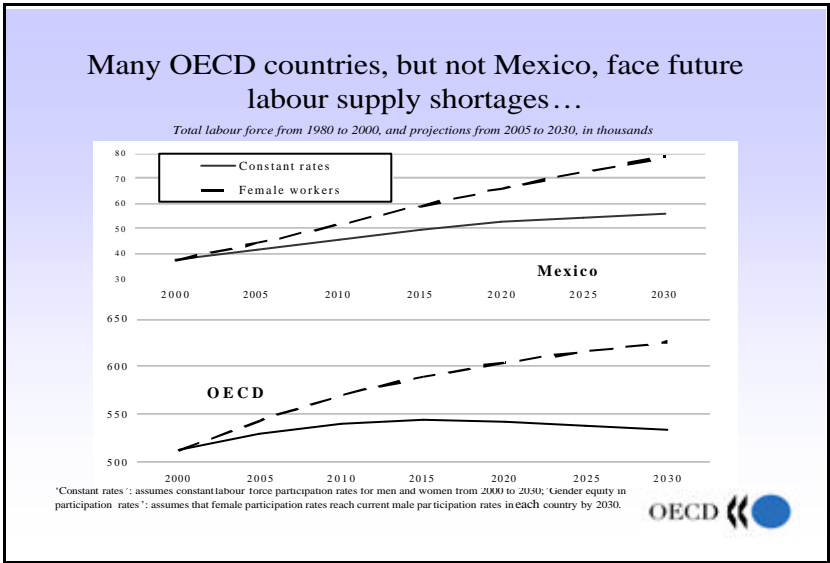
**Work-life balance policies vary as countries emphasize different policy objectives**

- Fertility
- Increasing female employment to sustain economic growth and pension systems
- Tackling child poverty and promoting child development
- Gender equity



**Labour supply concerns**

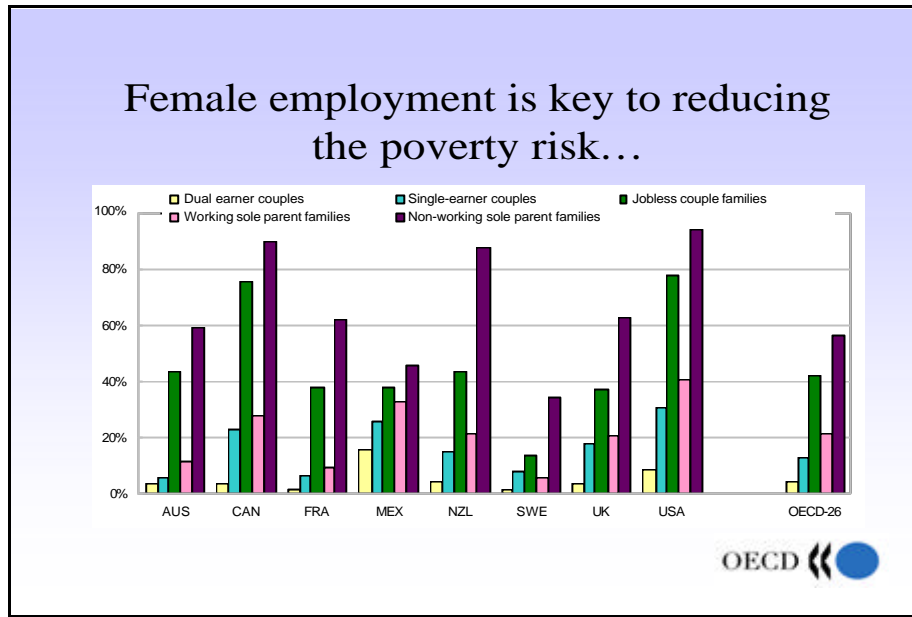
And as you can see from the next chart, when looking at future labour supply projections (see the black line) is that current labour force participation rates stay as they are and while the dashed line represents the pattern which would happen if over the next 30 years female labour force participation rate would increase to what it is for men in a particular country. I am not talking about working hours; I am just talking about labour force participation. In Mexico there is no problem; if labour force participation rates stay as they are, there are no future labour supply concerns, but in the OECD as a whole, labour supply will diminish as from 2015, and in a country like Japan it will decline rapidly.



**Combating child poverty**

The other policy objective I mentioned was reducing child poverty, which played a big role in policy development in the UK. If you look at the charts here, we can consider financial poverty at 50% of medium income. As you can see, poverty among couples where both parents work, the left bar in each of the 5 bars for each country, is by far the lowest, followed by families where only one parent is in paid employment. If you look at the sole parents and couple families without jobs, the poverty rate risk is strikingly high. You can see that it is important for family income to have mothers (or, in theory, the second earner in a couple family), participate in the labour force and that is why the UK Government in 1997 decided

to change the policy direction and started to emphasise providing financial incentives to work for sole parent families.



**Return on investment in family-friendly policies**

It is actually very interesting how little ‘hard-nosed’ evidence there is across the OECD area on the rate of return on investment in childcare, out of school hour’s care, or family-friendly policies at the workplace. If you ask an employer who has introduced such policies like flexible working time whether it has paid off, he says “yes”, or she says “yes” convincingly but if you then probe him or her to give you some hard numbers these are not forthcoming. You get general references to more motivation and higher productivity but it is very hard to relate such a fact to the introduction of a family-friendly workplace policy, so ‘hard-nosed’ evidence is hard to get. Nevertheless, there are a couple of studies in various countries which look at the rate of return on the investment in child care in terms of increased labour supply, and thus increased tax revenue for the government, decreased benefit spending and the positive value that childcare might have for child development in terms of better school performance at a later stage or reduced needs for social intervention later on in life. One of these studies by Cleveland and Krashinsky in Canada found that if the Canadian government invested in childcare for between 2 and 5 year olds worth 5.3 billion in 1998, they would have gotten back 4.3 billion in economic returns through increased tax revenue, and reduced benefit spending. Also, over time they would have generated another 6 billion in returns on increased child development, which suggests that the rate of return to one dollar invested in childcare is 2 dollars. For Switzerland, Muller-Kucera and Bauer are even more positive in saying that the rate of return for every Swiss Franc invested in childcare would be about 3 to 4 Francs. Also, half of the costs of HeadStart are recouped before children leave primary school, and in the long run the programme pays for itself. There seems to be a growing body of evidence that underpins the economic rationale for investing in childcare. As I said, in all my travels around the world meeting employers it was very hard to get ‘hard-nosed’ data on their returns on investment in family-friendly workplaces. In part, this is because for some employers the business case for family-friendly policies may not be all that strong. If you are a big law firm and you need to ensure that you keep your lawyers of which 50% is female (as is often the case in Australia or New Zealand and the proportion is growing in countries in Europe) then, yes, you have a very strong case to introduce such benefits and keep these workers attached to your firm. But in many other firms, especially when workers are easily replaced, employers have a much weaker case and are therefore less likely to be inclined to invest in family-friendly policies. In Japan, Korea, and in countries such as Austria or Finland, future labour supply concerns may contribute to employers becoming more interested to invest in better workplace facilities.

## Gender equity

In the interest of time, I would just like to say a few things on gender equity. It is still the case that women rather than men reduce their labour supply for child care reasons. From an economic perspective, this makes a certain amount of sense or is understandable as even in a country like Sweden in couple families, women on average contribute 66%, or two thirds of what men contribute to the couple household income. Gender pay gaps remain substantial on average about 12 percentage points at median income. Even there in a country like Sweden after years of gender equity (and gender equity is an important topic in the Swedish policy debate) women still earn less than men do. It is interesting to see that in Sweden there is currently a debate going on about individualization of paid parental leave. At the moment they have a parental leave system which reserves 2 months for the father with the period around child birth being obviously reserved for the mother) the rest parents can divide amongst them, but by and large it is the mother who takes leave. Even in a country like Sweden, it is difficult to increase the individualized period. A few more weeks of paternal leave does not contribute a dramatic change in paternal care behaviour. It is important that this changes, because as long as men do not start to care so to speak, it is very difficult for their partner to make a career. If you take the extreme case of a country like Japan where men on average spend about 15 minutes on household chores per week, you can see that it is impossible for women to combine a career with having children. So male behaviour has to change otherwise it is very difficult for mothers to increase their paid labour supply.

I have 2 more sheets and no more time, I don't think. There is one thing that I would like to stress here. There are a few governments across the OECD area that support the idea that one parent stays with the child until the age of 3. Often that is the mother and the prospect of mothers taking such a long career break in Finland contributes to the fact that many young women in Finland work on basis of a temporary employment contract. Employers see little reason to give women a regular employment contract if they are likely to drop out of the labour force for such a long period of time. These long career breaks limit gender equity even in a Nordic country like Finland. The other important characteristic of Nordic countries is that there is strong gender segregation in employment. Women are very often in employment in public health, education and child care services, and pay increment in the public service sector are relatively small compared to the (male dominated) the private sector. Also in Nordic countries, women frequently have difficulty getting through the glass ceiling


## Future policy development

I would like to finish taking a few things from the future policy development sheet, the last sheet of the presentation. What we found during the *Babies and Bosses* reviews area is that it is important that people get the feeling that there is continuous support available to them. That doesn't mean that all countries have to take up the Swedish model. The Swedish model is good but it is expensive: tax to GDP ratios are about 50%, while it is about half that in the US. In any case, key is that policy gives people the feeling that they can rely on support for a considerable period of time and that's why UK policy reform aims to give all parents who wish to work and who have a child from 3 or 4 and older until age 12, a guarantee that they can find care for their child from 8 in the morning until 6 in the afternoon. In my own country, the Netherlands, it is no surprise that so many women work part time as school hours are short and there is no after-school-hours-care which is currently a hot topic in the Dutch policy debate.

### Future policy development...

Invest in children through building a continuum of work and care supports for families, but there is no single model that fits all countries. Key elements:

- Ensure that young children are cared for all the time
- Remove barriers to employment for parents
- Promote gender equity
- Target public support first at low-income families as return on investment is potentially enormous
- Invest in out-of-school hours care to help working parents and address concerns on young adolescents
- Ensure that parental leave fosters both child development and labour market attachment

OECD 

In Nordic countries there is a high degree of trust in the public and the public authorities to deliver a good service, in other countries that trust is not as widespread. So it doesn't make sense to say do we merely copy the Swedish system to another country, it just doesn't work like that. Finally, the Babies and Bosses had a focus on parents, on whether they could combine their work and care commitments. This is important to having both parents in work, reduces the poverty risk, but it is very difficult and thus reduces negative consequences for child development. I hope that future work by the OECD in the next five years can contribute to more knowledge of child wellbeing and child welfare. I thank you very much for your attention. I didn't see too many people run out of the room, so I guess that the videolink presentation got through okay. Thank you.

## **RECONCILIATION BETWEEN PRODUCTIVE AND REPRODUCTIVE WORKS: ILO BEST PRACTICES**

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Thank you, I want to start by giving an outline of what I will talk about: I'll spend a bit of time on the trends in work and trends in families that are increasing conflict between work and family around the world. But since we have seen so much data on this in the last day and a half, I would like to spend most of my time talking about the ILO Convention on Workers with Family Responsibilities as a framework for national policies and programs to address reconciliation between work and family. Then, depending upon how much time there is, I will cover quickly some of the practical measures taken around the world for reconciling work and family and the resources the ILO offers for more information on these.

We have seen major changes in the work force and in families in the last several decades: the increasing labour force participation of women, changing family structures the decline of extended-family households, and the ageing of populations. We have also seen declining fertility rates in many, but not all, countries around the world, rural to urban migration as well as international migration that can erode the support that families and kinship networks offer in providing care. We have seen growth in the informal economy where workers typically labor beyond the purview of labour legislation, of labor rights and of social protections. Erosion in public services, health care and other services has occurred in many countries, reverting care services back to the family and increasing the workloads placed on families. Hours during which school is held and public services offered are often incompatible with work hours, and at the same time, more adult members of the family are working for pay and struggle to deal with these incompatible hours. People are also experiencing greater distances and longer travel time between home and work, reducing the time they have available for their family responsibilities. We see great variation in working time and work organization with few opportunities for work flexibility and a lack of quality part time jobs that could help workers accommodate their work and family responsibilities. We have heard already much discussion here on the lack of affordable childcare and family services and much discussion on the stubborn gender division of household labour. Together, these trends mark dramatic changes in the way that paid work and families are organized, which place these two spheres in potential and real conflict with each other.

I have compiled some ILO data but we have already seen much data so I will go over these quickly. This slide shows that women's labour force participation has been growing and has reached new highs in regions around the world. In Latin America, almost 50% of adult women are in the labor force; Latin America actually has the second lowest labor force participation rates of women of all the regions. Within Latin America, 1990 figures are shown as the light bar, 2000 figures as the dark bar; there have been increases in countries across the board in terms of women's labour force participation, with slight dips between these periods for some countries, due primarily to economic crises or recessions, etc.

We also see declining fertility rates around the world and in Latin American. These figures are provided in the handout of this presentation.

In terms of paid work, studies show that women spend fewer hours engaged in paid economic activities than men, on average. But when we look at unpaid work and paid work together, women spend more hours working in total than do men. This slide shows results from a study in Mexico using a time use survey; on average, women spend 45 hours per

week on unpaid work while men spend 34.6. We also have an ILO study from Brazil, which focuses on care responsibilities and social reproduction and we see that women spend 48 hours a week on unpaid care work compared to men's 6. These figures suggest that even as women's participation in paid economic activity has increased, they remain responsible for much of the unpaid work required in caring for their families and dependants.

Taken together, changes in work, in families, in the availability of public services and support, all contribute to a greater squeeze between work and family responsibilities particularly for women. Because women remain primarily responsible for family responsibilities, they tend to be less likely than men to be able to participate in the labour force at all; they often work fewer hours in paid work than men, and many must choose jobs that offer geographic proximity or time flexibility, but at the expense of better wages, at the expense of job security, at the expense of social protections and so on. For example, the ILO, in its work on entrepreneurship as an engine of growth for employment in many countries, has found from experience that women often say that they do not expand their entrepreneurship activities or they constrain the number of hours they spend on entrepreneurship activities because, even though these are considered more flexible forms of employment offering greater individual control, women still must meet the needs of their families with little support from their husbands or from public and social services.

The work-family squeeze for the poor can be particularly severe. In very poor families, the lack of basic infrastructure, roads, electricity, clean water, can mean that these families have to spend enormous amounts of time just meeting the most basic needs of their families, and given a gendered division of labor in most societies, this affects women's ability in particular to engage in paid economic activity.

As long as reproductive work remains the sole or the primary responsibility of women, women's chances for decent paid work and economic independence are low and they will continue to be in the position of economic dependence on others, undermining gender equality. Families are also increasingly placed in the difficult position of having to choose between more care for families and much needed income from workers, with implications for perpetuating poverty, for child educational enrolment, for child labour, as was discussed yesterday.

In the absence of public support systems for reconciling work and family, workers, especially women, undertake individual reconciliation strategies as we have seen; from limiting their economic activity to simply choosing not to have children, to migrating for work to provide better economic security but at the expense of personal involvement in the daily care of dependants. But these individual reconciliation strategies can impose high costs on women and on their families as well as on society, for example, as governments struggle to address the consequences of low fertility rates and changing societal demographics for public insurance and social security systems and for caring for ageing populations.

In view of these consequences and challenges, it is timely to turn to discussions about what we can do about this and I would like to turn to the types of policies and tools that we can use to promote the reconciliation between work and family. I'll start by introducing the ILO Convention on Workers with Family Responsibilities. I think everybody in the room is already familiar with the ILO but just in case there are those who aren't, briefly, the ILO is the international norm setting body in the area of work and employment. It was established in 1919 and has a tripartite structure comprised of the governments of member states, employers' organizations and workers' organizations. Since 1919, this tripartite structure has built up a system of international standards in almost all work related matters. ILO conventions are basically international treaties and are subject to ratification by member states. They come with a system of non-binding recommendations but that set out more specific guidance and advice for implementing and orienting national policy and action. As of today, there are 185 conventions.



The convention on Workers with Family Responsibilities was adopted in 1981, long after the first Maternity Protection Convention, (the first Maternity Protection Convention, No.3, was adopted in 1919), but more than 20 years after conventions on Equal Remuneration and on Non-discrimination were adopted. The adoption of this convention reflects the growing awareness at that time of the member states that as long as women remained the only ones responsible for social reproduction, they could not expect to achieve any substantial equality between men and women. The idea of the convention is not to pursue a general family policy but instead to deal with the issue of family responsibilities in so far as the responsibilities borne by workers could maintain or create inequalities between the sexes. The recommendation outlines what can be done at the national level to help develop policies to better reconcile work and family life.

This Convention, together with other key equality conventions, promotes equality in employment for men and women. The other key equality conventions include the Maternity Protection Convention, the most recent of which is Convention No. 183, adopted in 2000 (C.183 was the third revision of the Maternity Protection convention); Convention No. 100 on Equal Remuneration and Convention No. 111 on Non-discrimination with respect to occupation and employment. Other relevant conventions include those on working time, part time work, and on wages.

The basic objective of Convention No. 156 is to establish equality of opportunity and treatment between workers with family responsibilities; this means equality between men workers with family responsibilities and women workers with family responsibilities but also equality between these workers and men and women workers who have no such responsibilities. That is, sex equality between workers with family responsibilities is important, but there is also attention to the importance of ensuring that all workers with family responsibilities are not either less advantaged or more advantaged than workers who don't have such family responsibilities.

The Convention allows for progressive application; it can be applied by stages taking into account national conditions. In this way, it allows some flexibility to member states that ratify. The scope of the convention applies broadly to all sectors of economic activity and all categories of workers. In adopting the Convention, member States recognized that if the scope was limited only to full time regular employment for example, it would miss a great number of those workers who have family responsibilities, particularly women. At that time, the informal economy was not as visible on the international agenda as it is now, so the scope was initially viewed in terms of its inclusion of part time workers, home workers, temporary workers, and the private sector as well as the public sector. But because of the breadth of its scope, it can apply to the informal economy today as well.

The Convention applies to all men and women workers with family responsibilities for dependent children and for any other member of the immediate family who clearly needs care or support and both of those groups—dependent children and other dependent members—are subject to national definitions. The Convention applies to workers with family responsibilities, where such responsibilities restrict their possibilities for preparing for, entering, participating or advancing in economic activities. So it applies not just during employment, but also to pre-employment and I will return to this shortly in terms of technical and vocational training. The Convention can be applied through a number of instruments; national legislation, collective agreements, work rules, any manner consistent with national practice. Employers' and workers' organizations have the right to participate in devising and applying measures designed to apply the convention.

The convention does not lay down the specific means by which national policy should be formulated. What it does, is set out the objectives and requirements. It states that 'With a view to creating effective equality of opportunity and treatment for men and women workers, each Member shall make it an aim of national policy to enable workers with family responsibilities who are engaged or wish to engage in employment to exercise their rights to do so without being subject to discrimination and, to the extent possible, without conflict between their employment and family responsibilities' (Article 3). In fact, very few

governments have yet adopted and implemented a national policy concerning workers with family responsibilities in line with the convention but more and more countries have started to devote attention to measures by which workers might be better assisted to reconcile work and family obligations. The convention compels ratifying members to take all measures compatible with national conditions and possibilities to enable the workers to freely choose their employment, to take account of their needs in the terms and conditions of work and social security, to take account of their needs in family and community planning and to develop and promote community services, public or private such as child care and family services and facilities.

To elaborate on this, 'freely choose employment' means taking measures that would enable these workers to become and to remain integrated in the labour force and to be able to re-enter the labour market. It means equal employment opportunity with respect to access to employment, advancement within employment and employment security. To 'take account of their needs in terms and conditions of work' means ensuring that the terms and conditions of work enable workers to reconcile their employment and their family responsibilities and here the recommendation is particularly instructive. It notes that general measures that should be taken include those for improving working time, for example, by progressive reduction of hours of work for all workers and reduction of overtime for all workers, and through more flexible arrangements with regards to rest periods and holidays. It also makes note of the need for adequate regulation and supervision of part time work, home work, and temporary work, recognizing that these are often types of employment that workers with family responsibilities particularly women, work in, in order to accommodate family responsibilities and that as a result, these types of work need to be compensated on a prorated basis with full time work and they require adequate regulation and supervision if equality is to be achieved. The recommendation also calls for providing leaves, for example for parental leave, available to men and women, to facilitate care of very young children, or family leaves to care for dependent family members in the event of an illness or emergency.

In terms of 'social security', social security benefits, tax relief and such should be available to workers with family responsibilities, employment security and protection should be provided during leaves of absence and there should not be exclusions to social security protections because of the type of occupational activity of the spouse.

To 'take account of their needs in community planning and develop and promote community services, public or private' refers to measures such as providing childcare. This doesn't necessarily mean that the government has to do this—the government can, for example, provide childcare services itself or it can take a leadership role in promoting such service provision by communities, the private sector, through partnerships, etc. The recommendation also gives guidance, for example, on the need to collect statistics and undertake research, to determine the types of services, the types of facilities that would be needed in communities to address the needs of workers with family responsibilities. The recommendation suggests that government and competent authorities take appropriate steps to lighten the burden of family responsibilities, suggesting measures such as ensuring community services, such as public transport and water and electricity provision.

The Convention also calls on competent authorities and bodies in each country to take appropriate measures to promote information and education to generate public awareness of the principle of equality for men and women workers and the problems of workers with family responsibilities. Here the recommendation calls for research into the various aspects of employment of workers with family responsibilities so that appropriate policies can be developed and educational campaigns can encourage the sharing of family responsibilities between women and men. This is quite a progressive article of the convention because it takes a very holistic view that measures that make working life more compatible to family life in and of themselves will not be sufficient: there must also be steps to promote change in the gender division of labour.

Member states are called upon to organize vocational guidance and training to enable workers with family responsibilities to become and remain integrated in the labour force,

and to re-enter the labor force after an absence due to family responsibilities. This includes, for example, making vocational training facilities and paid educational leave arrangements available for workers. It could include services that are necessary to enable workers to enter or re-enter employment, such as vocational guidance, counseling, information, placement services, etc.

Finally, the convention includes a provision that family responsibilities cannot constitute a valid reason for termination of employment.

This convention has had 36 ratifications in its 24 years life span. In Latin America, several countries have ratified: Argentina, Belize, Bolivia, Chile, El Salvador, Guatemala, Peru, Uruguay and Venezuela.

The Convention provides an internationally recognized framework for work-family reconciliation. One of its great strengths is in bringing together different types of policies or measures, recognizing for example, that leaves for taking care of children and leaves for illnesses are necessary but they are not sufficient. Working time must also be part of the mix as must be efforts to redistribute responsibilities for family needs, among women and men but also more collectively: between families and the state, between families and the private sector, etc. Ratifying the Convention obligates a country to take necessary steps towards the promotion of equality between men and women with family responsibilities and between those workers with family responsibilities and those without. But even where it is not ratified, it provides important guidance and a useful framework from which to work.

In the five minutes I have left, I'd like to introduce you to some ILO resources that can be used for identifying the types of policies and practical measures that can be taken to promote the reconciliation of family and work. We have developed a series of information sheets on topics related to Work and Family, and a series of information sheets on Working Time explaining different working time schemes including information about which might facilitate and which might undermine work-family reconciliation (exhibit copy made available; also available by download at ILO's website).

For those of you working in particular countries, part of the ILO monitoring system is the Committee of Experts on the Application of Conventions and Recommendations which provides comments and observations in response to reports provided governments that have ratified a convention. This can serve as a source of information about the legislation and application of Convention No. 156 in ratifying member states. For example, we heard yesterday that Chile and some other countries have legislative provisions that crèches must be provided by employers who employ a certain number of women with family responsibilities. The Committee of Experts has taken note of such provisions, for example in Chile, and has noted that such provisions can have discriminatory effects on women (as employers may try to avoid hiring more women in order to avoid the threshold at which they become responsible for providing childcare), while offering suggestions for provisions that might be more gender-neutral in their effect (e.g. setting thresholds on the number of all employees, male and female, since male workers also have children). Information on the ratifications and the committee of expert comments are available on the ILO website, in the APPLIS database.

The ILO has just published a book available on order, "Reconciling work and family responsibilities" which has practical ideas on different types of family services, types of leaves, working arrangements, and awareness and education campaigns that governments, unions, and employers from around the world have undertaken to promote equality of opportunity and reconciliation of work and family.

We have a publication on Maternity at Work that is a review of national legislation around the world and includes information on the paternity and parental leave provisions in countries. For example, I have a slide here that shows the paternity leave provisions of several countries – seven days of paternity leave are provided in Colombia, two in Argentina, Sweden provides ten and ILO provides five. In terms of parental leave, Chile has

a provision that both parents shall be entitled to parental leave when the health of a child under 1 requires care in the home. In Cuba, parents are entitled to 9 months of leave when the child is a minor and 6 months of leave up until the age of 16. Both are unpaid, but what they do is allow workers to retain their employment at times that they also need to take care of their families. This book has comprehensive information on all the countries of the world. It is based on a searchable database that we have on our web site and is publicly accessible (the address is given in the handouts of this presentation).

A brief coverage of types of practical measures is included in the presentation handout, although there wasn't enough time in this presentation to go through them. Nevertheless, they also provide an overview of the range and variety of measures that can be taken by governments, workers, and employers to promote reconciliation between work and family.

## HEALTH SECTOR REFORM, CARE AND RECONCILIATION

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### Introduction

Health care brings together many of the issues as the centre of this conference. It is fundamentally about reproduction, as well as about paid and unpaid work. It is also about the public and private; both in the sense of private households and public arenas and of private and public sectors within the formal economy. Health care is also critically linked to issues of migration, of evidence and values.

Of course, there are important differences in health sector reforms not only among countries but also within countries. However, there are two common features of reforms throughout the world. These features shape the possibilities for reconciling both different kinds of care work and different health care needs.

### **First, the impact on women is greater than on men.**

Regardless of country or region, women do the overwhelming majority of health care work. This is the case whether care work is paid or unpaid, whether care providers have formal training or not, and whether care is provided in facilities or in homes. And women are the majority of those who need health care services, mainly because they have the babies, because they have more chronic diseases and HIV/AIDS and because they take children for care. While women make the majority of the small, daily decisions that have an impact on health, they make a small minority of the major policy decisions that shape health care services<sup>63</sup>. There are significant differences among women, differences that should lead us to continually ask which women we are talking about. But these patterns in carework, in health care use and decision-making are evident for women around the world.

This predominance of women is critical to our understanding of the second common feature; namely, the privatization of health services throughout the world. Here I am using privatization in the broadest sense to refer to the shift away from health care understood as a collective responsibility for a human right, with care based on need and provided in the spirit of public service, to one of health care understood as a consumer good and a private responsibility, with care based more on ability to pay and provided more in line with business principles.

The nature and extent of privatization varies considerably but there are common patterns that result from global pressures and agreements as well as from local government initiatives and local issues. These common patterns of privatization take a number of forms. Although these forms overlap, it is worthwhile to separate them in order to both see more clearly how they impact on women and on their possibilities for reconciling their needs and the demands placed on them by these various forms.

I want to briefly set out six of these forms and their impact on women, as a basis for establishing what needs to be reconciled and for discussing what strategies can be developed to encourage reconciliation.

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<sup>63</sup> See Pat Armstrong et. al. (2002) *Exposing Privatization. Women and Health Care Reform Aurora: Garamond.*  
Karen Grant et. al. (2004) *Caring For/Caring About. Women, Home Care and Unpaid Caregiving Aurora: Garamond.*

One form is the privatization of costs. Expenditures on health care are rising throughout the world, not only as the result of demographic pressures but also as a result of profits and ill health caused by poverty and poor working conditions. One way governments have been responding to this rise in costs is to shift responsibility for payment to others. This has been done by adding fees to public services, by cutting back on areas covered by public services and by failing to cover new services as they emerge. Individuals can pay directly for the service, they can buy insurance to cover the service or they can go without the service.

Yet there is little evidence to suggest that these moves to more private payment relieve economic pressures on the state and considerable evidence to indicate that private payment increases inequality in access to care. In the two OECD countries – the U.S. and Switzerland – that rely the most on private payment, governments spend the most on health care.

Women have fewer economic resources than men and less control over economic resources. Women are also less likely to have insurance coverage through paid work compared to men, they are less likely than men to be able to pay the fees or buy insurance. Women are thus more likely than men to go without necessary care. Moreover, because there are significant differences among women in terms of access to economic resources, the shift to private payment leads to increasing differences among women in terms of access to care.

A second form is the privatization of care delivery. In my country, as in some of yours, health care has been primarily delivered on a non-profit basis often by non-governmental agencies paid by the state. Increasingly, however, there is a move to have for-profit corporations deliver care or to establish public-private partnerships, based on the assumption that the private sector will be more efficient and effective and that the private sector has more resources.

Here, too, there is little evidence to support a claim that for-profit organizations are more efficient and effective at delivering care. But there is significant evidence to indicate that costs are higher and that quality may well be poorer<sup>64 65 66</sup>. Indeed, as the UK research shows, governments often spend more when for-profit organizations deliver public care.

In health care, money could be saved by reducing the costs of drugs and expenditures on technologies. However, there are significant limits on the money that can be saved by using technology to do the work. Some can be saved by releasing patients more quickly from hospitals, by using technology that allows shorter treatments and by reorganizing work to make it more efficient. But most of the costs in health care – as much as 90%– are labour costs. Thus the main way for-profit companies can save money in providing care is through reducing labour costs. They lower labour costs by hiring fewer providers and by making each of those who remain work faster and longer and by paying providers less. They also employ providers with less formal training at lower costs.

Because women are the majority of paid providers, they are the ones who see their care work transformed in ways that often threaten their conditions of work, along with their health. More of the jobs now are part-time and casual; more of those doing the work are defined as self-employed. Job security disappears for many while others simply lose their jobs. In my country, the privatization of support services has resulted in the loss of thousands of jobs for women, many of whom are immigrants or from racialized groups. Their wages have been cut in half, their hours of work have become more precarious and their job

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<sup>64</sup> McGregor, Margaret J. et al. (2005) “Staffing Levels in Not-For-Profit and For-Profit Long-term Care Facilities. Does Type of Ownership Matter?” *Canadian Medical Association Journal* March, 172(5):645-649.

<sup>65</sup> Devereaux, P.J., et al. (2004) Payments for Care at Private For-Profit and Private Not-For-Profit Hospitals: A Systematic Review and Meta-Analysis” *Canadian Medical Association Journal* 170(12, June):1817-1824.

security disappeared along with their pensions.<sup>67</sup> In health care, the quality of working conditions shapes the quality of care. Poor working conditions make for poor care. And as the quality of care declines as a result of work reorganization, the mainly female patients suffer.

The third form of privatization is directly related to second form; namely, the shift to for-profit delivery of services. It is the application to health care work of managerial strategies taken from the for-profit sector. Increasingly, health care is talked about and practiced as a for-profit concern even when it stays in the public sector. As is the case in shifting to for-profit delivery, the assumption is that for-profit practices are necessarily more efficient and effective and that such practices are applicable to care.

Again, there is little research to support this assumption and considerable evidence to challenge it. In the case of efficiency for example, research shows that surgical costs in the United States are double those in Canada, with no better outcomes for patients. As for treating health care like any other corporations, the terrorist attacks in Britain show that you cannot run hospitals at 95% capacity as you might a hotel because you always need space to respond to an emergency or even the daily variations in illness. But lack of evidence for the superiority of for-profit methods and of their application to health care has not prevented a massive move throughout the world to adopt such methods.

As is the case in the for-profit sector, time-motion studies are used to reorganize, control and speed-up the work, leaving health care workers in the public system, according to more than one we have interviewed, “with no time to care” and “not enough hands.”<sup>68</sup> The mainly female labour force feels guilty about the quality of care they provide, and often put in unpaid overtime to make up for the care deficit. Patients see and feel the speed-up defined as efficiency. The patients feel guilty as well when they ask for care. In the process, health care has become our most dangerous industry, with health sector workers over 50% more likely than other workers to miss work due to illness or injury.<sup>69</sup> And such figures underestimate the numbers who are made sick or injured at work on a daily basis. Our survey of workers in long-term care indicates that nine out of ten had suffered work-related job time loss over the last five years.<sup>70</sup>

A fourth form is the privatization of care work. With the dramatic expansion of public health systems following World War Two, paid health care work expanded enormously. Most of those hired to do the work were women. It was often defined as a labour of love, rather than as skilled work deserving appropriate compensation. But women fought hard to make their paid care jobs decent in terms of pay and conditions. They also fought hard to get the work recognized as both skilled and valuable. The resulting rise in costs has become one justification for cutting back on formal care. However, it would be a mistake to see unreasonable demands from the mainly female labour as a primary cause of cost increases. Census data in Canada “show that, on average, employment incomes for full-time workers in health occupations rose at about the rate of inflation between 1995 and 2000. That compares to almost a 6% after-inflation increase for all earners”<sup>71</sup>. Moreover, there are huge disparities in incomes among health care workers and in their wages gains in recent years. In many cases, the largest wage gains did not go to women. Another justification is often taken from the women’s health movement itself, the claim that institutional care is bad and care at home is good.

Increasingly, this work is being sent home to be done by women or expected of women even when their relatives and friends are in institutional care. It is characterized as sending

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<sup>67</sup> Marcy Cohen and Marjorie Griffin Cohen (2005) “The Politics of Pay Equity in B.C.’s Health Care System” *Canadian Women’s Studies* 23(3 and 4):72-77.

<sup>68</sup> Pat Armstrong and Tamara Daly “Not Enough Hands” Report prepared for the Canadian Union of Public Employees, 2005.

<sup>69</sup> CIHI [Canadian Institute for Health Information]. *Canada’s Health Care Providers*. Ottawa: Author, 2002, p.87.

<sup>70</sup> Pat Armstrong and Tamara Daly “Not Enough Hands” Report prepared for the Canadian Union of Public Employees, 2005.

<sup>71</sup> Canadian Institute for Health Information (2005c) *Exploring the 70/30 Split: How Canada’s Health Care System Is Financed* Ottawa: CIHI, p.17

care back home, implying that women have shirked their duties there. As women in Canada put it to a federal commission, women are being conscripted into unpaid care work, even though there is nothing natural, traditional or unskilled about cleaning catheters, applying oxygen masks and dressing wounds. In spite of talk about returning care to the home, most of this new care work was never done there and there is no evidence that the care provided in the past was all good care. But this does not prevent women being blamed for not providing care nor does it prevent them from feeling guilty. It does not protect their health or their paid work while they provide care either. The Decima Research Inc Survey<sup>72</sup> of unpaid providers found that half of them had difficulties with their emotional and physical health as a result of care work. 70% said they found that “providing this care had been stressful”. Not surprisingly, those with both eldercare and childcare responsibilities, most of whom are women, are the most likely to lose time at work as a result of caregiving.<sup>73</sup> This form of caregiving thus has social as well as economic costs, with days lost at paid work and declining social networks too often the price of care. Men are not entirely protected from such work either. Increasingly, men too are left to take on more homecare work when there are no women around to do the work and services are reduced.

And this shift to care in the home ignores the fact that many people do not have homes, or homes appropriate for care. Many homes that are physically sound are socially inappropriate, characterized by violence or other social conditions that prohibit care. Moreover, the shift of care to households increases inequality among women, because economic resources that allow women to hire others are unevenly distributed and so are relatives and others who can help with care.

A fifth form is the privatization of responsibility. We are increasingly held responsible for our health both by the dominant media and by the reorganization of health care. The shift in responsibility for health to individuals and families, away from governments, is evident in the strategies to reduce hospital stays and institutional care of any form. It is evident in the stress on individual prevention and lifestyle as well. And it is mainly women who are held responsible for their children’s health and that of their partners.

This form of privatization is often presented as a response to demands for empowerment and health promotion, and there is some justification for this claim. We do need more of both. Yet the move to this form of privatization ignores the ways in which structures of inequality and power shape women’s possibilities both for taking responsibility and for shaping their health.

A sixth form of privatization is the privatization of decision-making. As more care is delivered by private and foreign corporations, fewer of the decisions are open to public scrutiny and influence. More of the decisions are based on money and made by those with money. And as care is reorganized, more of the decisions about how long and how much care is provided are taken out of the hands of patients and providers, most of whom are women.

In sum, privatization is not one process but many. It is about a shift in who provides care, who pays for care, in how it is provided and where it is provided, in who is responsible and who decides. It is a fundamentally gendered process because women provide most of the care and use services in specific ways, although they often have little control over the structure of health care. The specific are different in our different countries but many of the processes and outcomes are the same. Women’s access to care and their conditions for care work deteriorate while inequality among women increases.

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<sup>72</sup> Decima Research (2002) *National Profile of Family Caregiver in Canada 2002* Ottawa: Health Canada Decima Research Inc p.6

<sup>73</sup> (Cranswick, 1999:12).



## Implications for Reconciliation

What, then, are the implications for reconciling care and for ensuring we all can engage in society?

Most importantly, governments at all levels have to take the responsibility for ensuring the right to care rather than shifting responsibility, as they have been in recent health care reforms. The evidence is clear that a public system offers the possibility of the most equitable, accessible and efficient quality care, as well as for care work. It also offers the only possibility for collective, democratic decision-making.

This means a strong public health system that begins by recognizing health care is a human right and that governments have a central role to play in ensuring the right to care. The right to care means not only access based on need rather than on ability to pay or employment but also the conditions that make it possible to provide the care people need. It means recognizing we have shared risks and shared responsibilities.

Taking responsibility does not necessarily mean governments must directly provide all the care people need or even indirectly provide all the care desired. Nor does a public system necessarily guarantee democratic decision-making. But it does mean<sup>74</sup>:

1. Ensuring access is not based on ability to pay and thus reducing or eliminating private payment for necessary care.
2. Regulating the conditions of work to ensure both appropriate working conditions and quality in care, including care in the household.
3. Creating the structures for actual community participation in decision-making about health services
4. Promoting transparency in decision-making.
5. Reducing the role of for-profit methods and delivery.
6. Providing a range of services, including institutional facilities, that offer alternatives to home-based care and that offers supports to those who provide care in the home, including support to continue in or return to paid employment.
7. Offering protection and supports in paid work for those providing unpaid care.

While the impact of health care reforms on women is both greater and more negative, many men too face deteriorating conditions for care with privatization. As the labour force becomes feminized in the sense of more jobs are like traditional women's work and as more care is sent home, more men are facing precarious employment and reduced access to care; more men are expected to provide care.

The kinds of strategies that are required to reconcile health care reforms with equity for women are reforms that can also work for men. They can also save our health and our costs in the long run. Someone must pay for and provide care. Sharing costs and the responsibilities is the only equitable approach to care.

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<sup>74</sup> See the Charlottetown Declaration on the Right to Care, [cwhn.ca](http://cwhn.ca). This set of principles is the product of an expert consultation on homecare and women's unpaid caregiving that took place in Canada, 2001.



## **HOW CAN WE MAKE THE 'FEMINISATION OF POVERTY' MORE POLICY-RELEVANT? TOWARDS A 'FEMINISATION OF RESPONSIBILITY AND OBLIGATION'?**

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The 'feminization of poverty' has played a major role in giving gender more centrality in international discourses on poverty and poverty reduction. Yet the way in which gender has been incorporated pragmatically – predominantly through the 'feminisation' of anti-poverty programmes - has not relieved women from the onus of coping with poverty in their households, and in some cases has exacerbated their burdens. In order to explore how and why this is the case, as well as to sharpen the methodological and conceptual parameters of the 'feminisation of poverty', this paper examines four main questions. First, what are the common understandings of the 'feminisation of poverty'? Second, what purposes have been served by the popularisation and adoption of this concept? Third, what problems are there with the 'feminisation of poverty' analytically, and in respect of how the construct has been taken up and responded to in policy circles? Fourth, how do we make the 'feminisation of poverty' more relevant to women's lives – and empowerment -- at the grassroots? Foremost among my conclusions is that since the main poverty-related tendency undergoing feminisation is that of a marked rise in women's responsibility and obligation for household survival, we need to re-orient the 'feminisation of poverty' so that it better reflects inputs as well as incomes, and emphasises not only to women's level or share of poverty, but the burden of dealing with it. Another, related, conclusion is that just as much as women are often recruited into rank-and-file labour in anti-poverty programmes, 'co-responsibility' should not be a one-way process. This requires the more active support of men, employers and public institutions in domestic labour and unpaid care work.

### **INTRODUCTION**

This paper reflects on the relevance of the 'feminisation of poverty' to analysis and policy in developing countries. Informed in part by recent field research in The Gambia, the Philippines and Costa Rica<sup>1</sup>, I argue that there is a need to re-orient the 'feminisation of poverty' in a manner which more appropriately reflects trends in gendered disadvantage among the poor, and which highlights the growing responsibilities and obligations women bear in household survival.

The term 'feminisation of poverty' was first coined in the 1970s (see, for example, Pearce, 1978), but did not make its major breakthrough into the development lexicon until the mid-1990s. A critical catalyst was the Fourth UN Conference on Women at which it was asserted that 70% of the world's poor were female, and eradicating the 'persistent and increasing burden of poverty on women' was adopted as one of the twelve critical areas of the Beijing Platform for Action. Disregarding the fact that the 70% level was supposed to be rising, and that ten years on no revision seems to have been made to the original estimate, this bold claim, with its alarming (ist) predictions of 'worse to come', seems to have brought women, if not gender, more squarely into the frame of international fora on poverty reduction, including in relation to Poverty Reduction Strategy Papers (PRSPs), and the Millennium Development Goals (MDGs) (Chant, 2006a: Chapter 1, 2006b). According to Wennerholm (2002:10), the 'feminisation of poverty' has been responsible not only for drawing attention to the 'great number of women living in poverty', but in highlighting the impact of macro-economic policies on women, calling for women to be recognised in the development process, and promoting consciousness of the existence and vulnerability of female-headed households. Added to this, as Williams and Lee-Smith (2000:1) contend: 'The feminisation of poverty is more than a slogan: it is a marching call that impels us to question our

assumptions about poverty itself by examining how it is caused, manifested and reduced, and to do this from a gender perspective'. With poverty reduction having become the zeitgeist of international development since the early 1990s (see Chen *et al.* 2004: xxi; Molyneux, 2006a,b), the astoundingly rapid translation of the 'feminisation of poverty' from opportunistic shorthand to 'established fact', has ostensibly been fortuitous. Indeed, in the last decade, an increasing amount of resources have been directed to women in the interests of their 'economic empowerment' (through education, vocational training, micro-credit and so on).

Yet there are various problems with the 'feminisation of poverty', methodologically, analytically, and in respect of its translation into policy responses. With this in mind, my paper is divided into five sections. The first explores common understandings of the 'feminisation of poverty'. The second examines the purposes served by the popularisation and adoption of this concept. The third summarises some of the key problems with the 'feminisation of poverty' analytically, and in respect of how the construct has been taken up and responded to in policy circles. The fourth suggests some revisions to the 'feminisation of poverty' concept, while the fifth points to directions for analysis and policy.

### I. WHAT IS UNDERSTOOD BY THE 'FEMINISATION OF POVERTY'?

Although the 'feminisation of poverty' is often used without any elucidation of its meaning, when the term is substantiated, a number of quite diverse features are ascribed to it.

#### COMMON CHARACTERISATIONS OF THE 'FEMINISATION OF POVERTY'

Women experience a higher incidence of poverty than men  
Women experience greater depth/severity of poverty than men (i.e. more women likely to suffer 'extreme' poverty than men)  
Women are prone to suffer more persistent/longer-term poverty than men  
Women's disproportionate burden of poverty is rising relative to men  
Women face more barriers to lifting themselves out of poverty  
The 'feminisation of poverty' is linked with the 'feminisation of household headship'  
Women-headed households are the 'poorest of the poor'  
Female household headship transmits poverty to children ('inter-generational transmission of disadvantage')

*Sources: Baden (1999); Cagatay (1998); Chant (1997b, 2003a,b); Davids and van Driel (2001, 2005); Moghadam (1997); Wennerholm (2002).*

Even then, there is rarely any explicit discussion of which kind of poverty is implied, although income seems to be the main criterion. Notwithstanding that six years have elapsed since Fukuda-Parr (1999) stressed that the feminisation of poverty was not 'just about lack of income', the emphasis on monetary poverty conceivably reflects the fact that this continues to be prioritised in the development mainstream, as, for example, in the first Millennium Development Goal.

While income should undoubtedly occupy a pivotal position in any assessment of poverty, it is somewhat strange that this should be the dominant principle in 'feminisation of poverty' orthodoxy when feminist research over the last 25 years has consistently stressed the importance of more holistic conceptual frameworks to encapsulate gendered privation which emphasise other dimensions of poverty. These include 'capability' and 'human development' frameworks, which identify factors which pertain to human capabilities or 'functionings' such as education, health, and infrastructure (see Fukuda-Parr, 1999; Kabeer, 2003; Sen, 1999; UNDP, 2005), 'livelihoods frameworks, which emphasise social as well as material assets (see Rakodi, 1999; Rakodi and Lloyd-Jones, [eds], 2002), 'social exclusion' perspectives which highlight the poor's marginalisation from mainstream society through lack of political participation, social dialogue, and 'voice' (see Chen *et al.* 2004:5-6; UNRISD, 2005:49), and frameworks which stress the importance of subjective dimensions of poverty

such as self-esteem, dignity, choice, and power (see Johnsson-Latham, 2004a; Kabeer, 2003; Painter, 2004; Rojas, 2003; World Bank, 2000).

Over and above the schism which seems to have evolved between the narrow parameters of the 'feminisation of poverty' and the more inclusive and holistic conceptualisations of gendered poverty, another conundrum is that in the light of shrinking disparities between a number of women and men's capabilities and opportunities – in education, employment and politics – it is almost counterintuitive that gender gaps in income poverty should be widening (Chant, 2006: Chapter 1). As observed by Moghadam (1997:3):

'The feminisation of poverty would ... appear to refute the idea that economic development and growth are generally accompanied by a trend towards the diminution of patriarchal gender relations and an advancement in the status of women through improvements in women's capabilities'.

Beyond the apparent paradox posed by women's rising capabilities and opportunities, and worsening incomes, another major problem attached to the focus on incomes and consumption in the 'feminisation of poverty' is that relevant data are extremely scarce. As noted by Rodenberg (2004:1): '...a large proportion of the 1.3 billion people living in absolute poverty are women, though there is too little gender-specific data to substantiate the oft-quoted figure of 70% (see also Baden, 1999:10; Chen *et al*, 2004:37; Elder and Schmidt, 2004:3n).<sup>2</sup>

Despite the calls of the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW), and more recently the Beijing Platform for Action (BFPA), for more sex-disaggregated statistics, there is still no international database which provides a comprehensive breakdown of the incidence and extent of women's income poverty in comparison with men (UNIFEM, 2002:60). In terms of the South, only for Latin America and thanks to the Economic Commission for Latin America and the Caribbean (ECLAC), do we have a regional breakdown of the numbers of females and males within households which fall below national poverty lines (see Table 1). While on the surface, these data suggest that women are poorer than men, and indeed in all rural areas for which data are available a higher percentage of the female population is below the poverty line, differences are for the most part, fairly marginal. Moreover, in urban areas in 10 out of 17 countries, the proportion of men in poverty is actually on a par with or slightly higher than women. On the basis of this, UNIFEM (2002:61) concludes that the 'feminisation of poverty' is present only in some countries in Latin America, and that women are nowhere near the level of 70% of people in income poverty as popularly expounded.

#### GENDER AND POVERTY IN LATIN AMERICA

Country	Area	Proportion below poverty line (%)		Females per 100 males below poverty line
		Male	Female	
<b>Argentina</b>	Urban	23.8	23.6	99.3
<b>Bolivia</b>	Urban	48.6	48.2	101.4
	Rural	79.4	81.6	102.8
<b>Brazil</b>	Urban	33.0	32.6	99.5
	Rural	54.8	55.6	101.6
<b>Chile</b>	Urban	20.6	20.6	101.0
	Rural	26.4	28.8	109.1
<b>Costa Rica</b>	Urban	16.8	19.2	114.4
	Rural	20.8	23.8	114.5
<b>Dominican Republic</b>	Urban	33.9	36.9	110.2
	Rural	37.7	43.3	115.0

<b>Ecuador</b>	Urban	63.1	63.3	102.8
<b>El Salvador</b>	Urban	38.1	39.0	101.3
	Rural	64.9	65.4	100.8
<b>Guatemala</b>	Urban	45.7	45.4	101.0
	Rural	69.8	70.0	100.4
<b>Honduras</b>	Urban	66.6	65.4	99.3
	Rural	81.0	81.5	100.8
<b>Mexico</b>	Urban	38.7	38.7	101.0
	Rural	58.3	58.6	101.6
<b>Nicaragua</b>	Urban	63.4	64.5	101.7
	Rural	77.4	76.6	99.0
<b>Panama</b>	Urban	25.8	26.6	103.1
	Rural	40.4	43.6	107.9
<b>Paraguay</b>	Urban	49.7	47.4	97.1
	Rural	73.2	74.4	101.9
<b>Uruguay</b>	Urban	9.7	9.4	97.3
<b>Venezuela</b>	Total	48.6	50.0	104.4

Sources: CEPAL (2002: Cuadros 6a & 6b); UNIFEM (2002: Table 15)

Although numbers and incomes in themselves are rather limited, CEPAL's efforts represent a laudable start given the paucity and poor quality of data elsewhere in the South, where many poverty assessments are based on aggregate household incomes (and in some contexts, such as The Gambia, merely on the characteristics of the household head alone), which is hardly a promising basis for gendered evaluation. Generally speaking female heads end up as a crude proxy for 'women', without any consideration of vital factors pertaining to the make-up of their households, such as the sex and age of other members, or even household size (see Fukuda-Parr, 1999; Ruggeri Laderchi *et al.* 2003:13; van Vuuren, 2003). The issue of how comparisons are drawn with male-headed households (i.e. using aggregate household income, generally based on earnings) is particularly problematic. Because of their smaller size, female-headed households are often more visible in poverty statistics, yet in per capita terms they may actually be better off (see Kabeer, 2003:79-81; also Bongaarts, 2001; Chant, 1997b). Moreover, even aggregated household data do not present us with a picture of unilateral disadvantage. Despite a rise in extreme poverty among female-headed households in some parts of Latin America over the last decade, and that the greatest increase in female headship occurred among the poor as a whole (see Arriagada, 2002; ECLAC, 2004b:58; also Table 2), within a wider geographical remit there is actually little evidence to support the notion that women-headed households are poorer than their male counterparts in any systematic manner (Chant, 1997b, 2003a; CEPAL, 2001:20; Chen *et al.* 2004:37; Fukuda-Parr, 1999:99; IFAD, 1999; Moghadam, 1997:8, 1998; Quisumbing *et al.* 1995). As summarised by Lampietti and Stalker (2000:2): 'Headship analysis cannot and should not be considered an acceptable substitute for gender and poverty analysis' (see also Fuwa, 2001).

**FEMALE-HEADED HOUSEHOLDS BY POVERTY STATUS OVER TIME  
IN URBAN LATIN AMERICA**

<b>Country &amp; year</b>	<b>Total % of households headed by women</b>	<b>Extremely poor (%)</b>	<b>Poor (%)</b>	<b>Non-Poor (%)</b>
<b>Argentina (Gran Buenos Aires)</b>				
1990	21.1	26.2	11.6	22.3
1994	24.0	22.0	20.0	24.0
1997	26.1	31.7	24.1	26.5
1999	26.9	36.9	28.0	26.5
<b>Bolivia</b>				
1989	16.7	22.0	24.1	26.1
1994	18.0	20.0	17.0	18.0
1997	20.7	24.0	22.4	18.6
1999	20.9	24.4	18.9	20.7
<b>Brazil</b>				
1990	20.1	24.2	22.6	18.4
1993	21.7	22.9	21.0	21.7
1996	23.7	24.1	22.1	24.0
1999	25.4	24.2	24.2	25.9
<b>Chile</b>				
1990	21.4	24.5	19.8	21.5
1994	22.0	27.0	21.0	22.0
1996	23.0	29.0	22.0	23.0
1998	24.0	28.0	23.0	24.0
<b>Costa Rica</b>				
1991	24.1	27.7	22.3	24.0
1994	24.0	24.0	24.0	24.0
1997	26.8	51.0	35.5	24.0
1999	27.9	55.8	38.5	24.9
<b>Ecuador</b>				
1990	16.9	21.6	15.9	15.3
1994	18.7	22.7	17.5	15.3
1997	18.6	23.8	18.6	16.7
1999	20.1	22.9	20.5	18.0
<b>El Salvador</b>				
1995	30.8	28.2	31.3	29.0
1997	30.2	35.8	33.2	27.8
1999	31.4	35.5	35.5	29.2
<b>Guatemala</b>				
1989	21.9	23.1	21.0	21.7
1998	24.3	24.2	21.9	25.3
<b>Honduras</b>				
1990	26.6	35.4	21.2	21.4
1994	25.0	28.0	25.0	21.0
1997	29.2	31.9	27.7	27.5
1999	30.3	32.2	30.4	28.1
<b>Mexico</b>				
1989	15.7	13.9	14.0	16.7
1994	17.0	11.0	16.0	18.0
1996	17.5	17.1	14.7	18.9
1998	19.0	18.0	16.0	20.0
<b>Nicaragua</b>				
1993	34.9	39.9	33.8	31.7
1998	34.5	39.2	36.4	29.6
<b>Panama</b>				
1991	26.0	33.7	29.0	23.5
1994	25.0	35.0	25.0	24.0

1997	27.5	36.5	28.8	26.2
1999	27.4	44.6	28.0	25.8

Source: CEPAL (2002: Cuadro 6E)

Despite these rather major caveats, from the early 1990s onwards categorical pronouncements about female-headed households being the 'poorest of the poor' have flowed thick and fast (see Box 2).

#### **ASSERTIONS ABOUT FEMALE-HEADED HOUSEHOLDS AS THE 'POOREST OF THE POOR'**

'...the global economic downturn has pressed most heavily on women-headed households, which are everywhere in the world, the poorest of the poor'.

**Tinker (1990: 5)**

'Women-headed households are overrepresented among the poor in rural and urban, developing and industrial societies'.

**Bullock (1994:17-18)**

'One continuing concern of both the developing and advanced capitalist economies is the increasing amount of women's poverty worldwide, associated with the rise of female-headed households'.

**Acosta-Belén and Bose (1995:25)**

'What is clear is that in many countries women tend to be over-represented in the ranks of the "old" or structural poor, and female-headed households tend to be among the most vulnerable of social groups'.

**Graham (1996:3)**

'...the number of female-headed households among the poor and the poorer sections of society is increasing and...they, as a group -- whether heterogeneous or not -- are more vulnerable and face more discrimination because they are poor and also because they are man-less women on their own'.

**Bibars (2001:67).**

'Households headed by females with dependent children experience the worst afflictions of poverty ... Female-headed households are the poorest'.

**Finne (2001:8)**

'Households headed by women are particularly vulnerable. Disproportionate numbers of women among the poor pose serious constraints to human development because children raised in poor households are more likely to repeat cycles of poverty and disadvantage'.

**Asian Development Bank (2003:11)**

Source: Chant (2033a, 2006: Chapter 1)

Irrespective of whether we consider households or individuals, another major problem in sustaining the 'feminisation of poverty' thesis as a trend, is the dearth, if not total absence, of sex-disaggregated longitudinal panel data (Johnsson-Latham, 2004b:18; Nauckhoff, 2004:65).

While I will return to some of these concerns later, it is none the less important to highlight the positive impacts of the 'feminisation of poverty' in 'engendering' the poverty agenda.

## **II. THE IMPORTANCE OF THE FEMINISATION OF POVERTY IN ENGENDERING POVERTY ANALYSIS AND POVERTY REDUCTION STRATEGIES**

As mentioned earlier, growing circulation of the notion of a 'feminisation of poverty' in academic and policy arenas has had a number of benefits.

The term 'feminisation of poverty' may be poorly elaborated or substantiated, but it is nonetheless a succinct and hard-hitting slogan – what Molyneux (2006a) so eloquently describes as 'a pithy and polyvalent phrase', effective as a way of underlining the point that poverty is 'a gendered experience' (emphasis in original). With a helping hand from unbridled repetition, the 'feminisation of poverty' has proved sufficiently persuasive to grab



the attention of planners and policymakers beyond as well as within the GAD field. In the process this has helped to raise the status of women's (if not gender) concerns in national and international discourses on poverty and social development (see Chant, 2006: Chapter 1; Jassey, 2002). In Latin America and the Caribbean, for example, ECLAC's Secretariat has established as one of its foremost priorities, to 'identify the characteristics of female poverty and its associated causes' (ECLAC, 2004b:82). More generally, Johnsson-Latham (2004b:20) notes that:

'...the value of integrating poverty and gender and development has been increasingly acknowledged both within UN agencies such as the UNFPA and UNIFEM, among bilateral development agencies, and in the research communities in the North and South. Thus today more coherent efforts are made to better understand poverty by applying a gender perspective'.

The need to incorporate gender has not only increasingly been taken on board in poverty analysis, but in policy and practice too. This is conceivably because the wedding of gender and poverty offers the tantalising prospect that 'two birds may be killed with one stone' i.e. in the process of reducing poverty, gender equality goals can also be realised. Certainly, what Rodenberg (2004:iv) describes as a 'win-win' formula, whereby greater gender equity, economic growth and effective poverty reduction are regarded as mutually reinforcing, is in ample evidence. As articulated by the Asian Development Bank (2002:135) in the context of their mission to improve the quality of life in developing member countries, the '...overarching goal of poverty reduction is closely linked to improving the status of women, since equity - especially gender equity - is now recognised as an essential factor in transforming growth to development and reducing poverty'. In the 'South' more generally, women's 'economic empowerment' -- through welfare and productivity investments - has progressively been deemed crucial not only in achieving gender equality but eliminating poverty, and leading to development which is 'truly sustainable' (UNIFEM,2002:1-2; see also DFID, 2000; Razavi, 1999:418; Rodenberg, 2004;UNDAW, 2000; UNDP, 2001a). To this end, resources have been garnered for a range of interventions aimed at increasing women's literacy and education, facilitating their access to micro-credit, enhancing their vocational skills, and/or providing economic or infrastructural support to female-headed households (see Chant, 1999,2003a; Kabeer, 1997; Mayoux, 2002; Pankhurst, 2002; UNDAW, 2000; Yates, 1997).

In light of the above, widespread take-up of the 'feminisation of poverty' could be celebrated as something of a 'coup' for GAD stakeholders. Its bold (and surprisingly little contested) claims have provided an important tactical peg upon which justification for directing resources to women may be hung (see Baden and Goetz, 1998:23; Chant,2003a; Jackson, 1998). Even if there is increasing recognition within GAD circles that it is difficult to pin down the extent of women's poverty with any precision (even in income terms), and/or that female-headed households may not be the 'poorest of the poor', the construction has managed to put 'gender on the agenda' in an unprecedented manner. Wedding gender to poverty reduction has secured resources for women, so why abandon a term which has proved so fruitful in this regard?

Yet although the 'feminisation of poverty' has undeniably had some advantages, its current constitution, and rather uncritical adoption, poses a number of problems for analysis and policy alike.

### **III. PROBLEMS WITH THE 'FEMINISATION OF POVERTY' THESIS FOR ANALYSIS AND POLICY**

#### **A) Analytical Problems**

With regard to analytical problems with the 'feminisation of poverty', those which particularly stand out are as follows:

##### **1) Lack of attention to differences among women**

Aside from the general problem of scant sex-disaggregated data on poverty, data which are disaggregated along other lines are also lacking.

For example, beyond disaggregation between male and female household heads (which has led to the misguided conflation of the latter with 'women'), scarcely any attention has been paid to differences among women, such as age, which might be particularly important in determining whether and how poverty might be feminising.

As mentioned previously, the diminishing gaps between women's and men's capabilities make it difficult to sustain that women are at greater risk of becoming poorer than men over time, or at least that gendered poverty gaps are increasing among the young. By contrast, it is plausible that disproportionate poverty among women is increasing due to demographic ageing.

Given women's generally greater life expectancy, there is an increasing tendency for more women to feature in populations as a whole, and among senior age groups in particular. Indeed, in Latin America and the Caribbean, 60% of the population aged 60 and above are female (PAHO/MIAH, 2004:1).

In turn, female senior citizens may be particularly prone to disadvantage for three main reasons: first, a legacy of greater gender gaps – for example in education, literacy, savings, pension coverage and so on; second, a greater probability that older women will be widowed than men, and/or live alone, and third, the possibility that older women suffer greater social and economic discrimination than their younger counterparts, or their male peers (see CELADE, 2002:17; ECLAC, 2004b:45-6; Ofstedal *et al.*, 2004:166-6; UNMP/TFEGE, 2005:13). While these hypotheses could be contested on account of the fact that older people are still a relatively small proportion of the population in most developing countries (see WHO, 2005:Annex Table 1), or that older people are often taken care of, or at least co-reside with family, with inter-generational transfers tempering the privation they might otherwise experience (see Ofstedal *et al.*, 2004:197), and that, women's age-related risk of poverty is clearly cross-cut by other factors such as household circumstances, education, employment, unless progress can be made towards further disaggregation of what little sex-disaggregated data exist, then we are unlikely to know how far demographic -- or other -- factors have a part to play in poverty's purportedly inexorable process of 'feminisation'.

## 2) Over-emphasis on income

A second major analytical problem with the 'feminisation of poverty' thesis, as underlined earlier, is its implicit privileging of income and neglect of other dimensions of poverty which encompass social as well as material deprivation, and embrace subjective as well as objective dimensions.

Although obtaining and quantifying information on social and subjective aspects of privation is difficult, it is wrong to assume – as is so often intimated – that collecting data on incomes or consumption is any less problematic. Besides this, the value of remaining confined to income data to support the 'feminisation of poverty' is dubious for two main reasons. First, income, along with longevity, is argued to be one of the few indicators which seems less robust in confirming women's relative privation than other criteria commonly found in the GAD literature such as access to land and credit, decision-making power, legal rights within the family, vulnerability to violence, and (self)-respect and dignity (see Johnsson-Latham, 2004b:26-7). In short, the privileging of income may underestimate the extent to which poverty is feminised, or feminising, and deflect attention from other factors pertinent to women's disadvantage. As argued by Rodenberg (2004:5):

'The important determinants that go into the making of women's social positions in today's world society are marked by legal, political, cultural and religious discrimination. These circumstances clearly indicate that the fact women are disproportionately affected by poverty is neither due primarily to lower incomes nor finds its sole expression in them.

Instead, inequality has its most important roots in inadequate access to resources, lack of political rights, and limited social options as well as in a greater vulnerability to risks and crises' (see also Franco, 2003; Fukuda-Parr, 1999; Moghadam, 1997; Morrisson and Jütting, 2004; Parpart, 2002; UNDP, 2005).

Second, and related to this, unless we are able to get a handle on poverty's subjective dimensions or its multidimensionality, we cannot go very far in understanding gendered poverty and its dynamics, or make policy-oriented assessments of poverty more relevant to women at the grassroots. For example, while level of household income is clearly important in any poverty diagnosis, it is also important to appreciate that this may bear no relation to women's poverty because women themselves may not necessarily be able to access it (see Bradshaw, 2002:12; Chant, 1997a,b). For many women, the capacity to command and allocate resources may be considerably more important than the actual resource base in their households (Chant, 2003b, 2006: Chapter 2). Factors such as intra-household dynamics and the issue of 'secondary poverty' have frequently been stressed by feminist research as among the major factors in accounting for women's privation, and as articulated by Sweetman (2005:3): poverty is '...as much about agency compromised by abuse, stress, fatigue and voicelessness, as it is about lack of resources'.

The importance of taking into account subjectivities and the multidimensionality of poverty has perhaps been best illustrated in work on female household headship and the notion of 'trade-offs'.

'Trade-offs' refer to the ways in which women make tactical choices between different dimensions of poverty in the interests of personal, but more usually, household well-being (Chant, 1997b, 2003a; Kabeer, 1996, 1997). For example, being without a male partner (and men's earnings) may at one level exacerbate poverty for female heads – especially in respect of incomes -- but this can be compensated by other gains. The latter may include female heads being able to use whatever income they themselves or other household members earn at their own discretion, to avoid the vulnerability attached to erratic support from men, or simply to enjoy a greater sense of well-being because their lives are freer from conflict, coercion or violence (Chant, 1997b; van Driel, 1994; Jackson, 1996).<sup>3</sup> While choice of trade-offs may be limited (Kabeer, 1997, 1999; also van Driel, 1994), and the 'price' of women's independence may be high (Jackson, 1996; Molyneux, 2001: Chapter 4), as Graham (1987: 59) has argued: '...single parenthood can represent not only a different but a preferable kind of poverty for lone mothers' (see also González de la Rocha, 1994; UNDAW, 1991:41). Indeed, one very interesting factor is that although women do not usually choose to stay single or to see their marriages or unions dissolve, others opt to remain alone rather than return to ex-partners or to form new relationships (see Chant 1997a: Chapter 7; also Bradshaw, 1996; van Vuuren, 2003:231; Ypeij and Steenbeek, 2001). As noted in research in Porto Alegre, Brazil, women who live without partners often do so not through lack of opportunity, but by choice (Fonseca, 1991:156). In many cases these are older (post-menopausal) women, who, 'having gained a moment of respite in the battlefield of the sexes', prefer to rely upon sons than spouses (ibid.:157). This helps to underline the idea that poverty analysis cannot afford to lose sight of women's personal experiences and perceptions, the diverse range of privations they face, and the fact that within an albeit limited remit, they may also exert agency. As articulated by Rodenberg (2004:13):

'Women are...more often affected, and jeopardised by poverty. Lacking powers of self-control and decision-making powers, women – once having fallen into poverty – have far fewer chances to remedy their situation. This fact, however, should not be understood to imply globally that e.g. a rising number of women-headed households is invariably linked with a rising poverty rate. It is instead advisable to bear in mind that a woman's decision to maintain a household of her own may very well be a voluntary decision – one that may, for instance, serve as an avenue out of a relationship marred by violence. If poverty is understood not only as income poverty but as a massive restriction of choices and options, a step of this kind, not taken in isolation, may also mean an improvement of women's life circumstances'.

### 3) Over-emphasis on female-headed households

Leading on from this, a third major problem with the feminisation of poverty is its over-concentration on female headed households, encapsulated by such statement as: ‘..the feminisation of poverty is the process whereby poverty becomes more concentrated among individuals living in female-headed households’ (Asgary and Pagán, 2004:97). This emphasis in the thesis is somewhat paradoxical given that while feminist research has often identified that men are a major cause of women’s poverty in developing countries – especially at the domestic level - the feminisation of poverty suggests that when women are without men, their situation becomes worse!

Moreover, as intimated in Rodenberg’s statement above, it is increasingly evident that women may actively choose to household headship as a means by which they are able to enhance the well-being of their households and/or exert more control over their own lives (see Safa, 1995; van Vuuren, 2003). As summarised by Baden (1999:13): ‘The processes which lead women to head households are many and in some cases this may represent a positive choice, so that the connotations of powerlessness and victimhood are inappropriate’.

Another case against undue emphasis on female-headed households in the ‘feminisation of poverty’ is that they are a highly heterogeneous group. Differentiation derives from a wide range of factors including routes into the status, stage in the life course and household composition. These, and other axes of difference, can exert mediating effects on poverty and thereby defy their categorical labelling as the ‘poorest of the poor’ (Chant, 2003a; also Lampietti and Stalker, 2000).

### 4) Neglect of men and gender relations

A fourth analytical problem with the ‘feminisation of poverty’ thesis is that its focus on women tends to deflect attention from men and gender relations, when it is perhaps precisely these which should come under greater scrutiny. Indeed, if poverty is feminising, then does this imply a counterpart ‘masculinisation’ of power, privilege and asset accumulation? If so, how is this explained when there is so much talk of a ‘crisis of masculinity’ and mounting evidence that men in some countries are beginning to fall behind women in respect of educational attainment and access to employment (see for example, Arias, 2000; Chant, 2000, 2002; Escobar Latapi, 1998; Fuller, 2000; Gutmann, 1996; Kaztman, 1992; Silberschmidt, 1999; Varley and Blasco, 2000)? At the end of the day, this may be a question of balance between two opposing tendencies and how far they affect men in general. While UNRISD (2005:12) notes that some men are disadvantaged, and this can exert costs such as higher suicide rates and stress- and alcohol-related health risks, in general: ‘Male underachievement has not led to parallel underachievements in wealth and politics’. Regardless of whether this is actually the case, men and gender relations deserve looking into as part and parcel of any analysis of the feminisation of poverty.

On top of these four already quite well-established criticisms, a fifth set of points which draw substantially from my recent fieldwork in The Gambia, the Philippines and Costa Rica (see Note 1), emphasises the importance to re-casting the feminisation of poverty along broader lines such that it takes into account inputs as well as incomes.

### 5) Missing the major points about gendered poverty: the ‘feminisation of responsibility and obligation’

The broader remit I deem relevant to the ‘feminisation of poverty’ derives from the observation that although women are often income-poor, and this owes to a whole host of discriminatory processes which need to be addressed, what is also critically important is that they are increasingly at the frontline of dealing with poverty. While the burden of household survival has long been widely documented as falling disproportionately on women, the unevenness between women’s and men’s inputs and their perceived responsibilities for coping with poverty seem to be growing. In some cases, the skew is

such that it has reached the point of virtual one-sidedness. On top of this, women’s mounting responsibilities do not seem to be matched by any discernible increase in rewards or entitlements – whether of a material or non-material nature. The social worth of women’s efforts tends to go unacknowledged, robbing them of personal gains, satisfaction, or a sense of justice that might accrue from taking on the struggle against daily or long term hardship with greater solidarity.

These observations are perhaps best encapsulated under the rubric of a **feminisation of responsibility and obligation**<sup>4,5</sup> in which four elements are in need of particular emphasis:

*(i) While women’s work in household survival is diversifying and intensifying, men’s seems to be restricted and/or even diminishing.*

In the context of The Gambia, the Philippines and Costa Rica, growing numbers of women of all ages are working outside the home, as well as performing the bulk of unpaid reproductive tasks for husbands, fathers, brothers, and sons. Men on the other hand, are not only finding it harder to be the sole or primary economic support for their households, but are not increasing their participation in reproductive work either.

These observations find parallels in other studies. For example, while there is some evidence in countries as Chile and Mexico that more men are playing a greater role in caring for children (Alm eras, 2000; Gutmann, 1996; Olavarr a, 2003), in the region more generally, domestic labour continues to be designated almost exclusively to women (Arriagada, 2002:159). As summarised by ECLAC (2004b:5): ‘...most men still do not share in household work or in the array of unpaid care-giving activities entailed by membership in a community or society’. In turn, men in ‘...male-headed households are more likely to enjoy the advantages of free domestic work by the spouse, thus avoiding expenditures otherwise associated with maintaining a household’ (ibid.:23). Beyond Latin America, a study by the UNDP of 9 developing and 13 advanced economies found that unpaid reproductive labour accounted for two-thirds (66%) of women’s work, compared with only one-quarter to one-third of men’s (24-34%), and that women work more hours than men overall (see Rodenberg, 2004:17, Box 5; also Table 3). Generally speaking, the disparity between hours of men’s and women’s work is most marked among low-income groups, and, as noted by Pineda-Ofreneo and Acosta (2001:3): the ‘...poorer the household, the longer women work’

**GENDER, WORK BURDEN AND TIME ALLOCATION: SELECTED DEVELOPING COUNTRIES**

Country	Year	Burden of work			Time allocation (%)					
		Total work time (minutes per day)		Female Work time (% of male)	Total work time		Time spent by women		Time spent by men	
		Women	Men		Market Activities <sup>1</sup>	Non-market-activities	Market activities	Non-market activities	Market activities	Non-market activities
<b>Urban areas</b>										
Colombia	1983	399	356	112	49	51	24	76	77	23
Venezuela	1983	440	416	106	59	41	30	70	87	13
Kenya	1986	590	572	103	46	54	41	59	79	21
Nepal	1978	579	554	105	58	42	25	75	67	33
Indonesia	1992	398	366	109	60	40	35	65	86	14
AVERAGE <sup>2</sup>		481	453	107	54	46	31	69	79	21
<b>Rural areas</b>										

Guatemala	1977	678	545	117	59	41	37	63	84	16
Kenya	1988	676	500	135	56	44	42	58	76	24
Bangladesh	1992	545	496	110	52	48	35	65	70	30
Nepal	1978	641	547	117	56	44	46	54	67	33
Philippines	1975-7	546	452	121	73	27	29	71	84	16
AVERAGE		617	515	120	59	41	38	62	76	24

*Source:* UNDP (2004: Table 28)

**Notes:**

Market activities refer to market-oriented production activities as defined by the 1993 revised UN System of National Accounts (SNA). Averages for urban and rural areas refer to unweighted averages for countries listed in relevant sections.

*(ii) Intensification of women's reproductive labour under poverty*

At the same time as women are diversifying their activities in household survival, their reproductive labour often intensifies too as they come under the hammer of price liberalisation and reduced subsidies on basic staples. This is driven by the need to stretch incomes further, whether through increased self-provisioning, or the need for more careful budgeting and expenditure. An additional factor particularly impacting on low-income women is that limited and/or declining investment by the public sector in essential infrastructure and basic services makes domestic labour and unpaid care work more onerous and time-consuming still, especially where market alternatives are unaffordable (see Chant, 1996; UNMP/TFEGE, 2005:7).

*(iii) Persistent and/or growing disparities in women's and men's 'choices', 'freedoms' and responsibilities: the unhappy marriage of tradition and transition?*

Women's mounting responsibilities for coping with poverty do not seem to be giving them much leverage in respect of negotiating greater inputs to household survival on the part of men. Frequent mention is made by women at the grassroots in The Gambia, Philippines and Costa Rica that they have little choice but to deal with poverty on a daily basis, working harder in and outside the home, and allowing themselves minimal licence for rest and recreation, or personal over collective expenditure. Men, by contrast, seem to feel entitled to periodic or even regular 'escapes' from the burden of assisting their families. This ranges from withholding earnings (and/or appropriating those of their wives or other household members), to absenting themselves from the home to spend time with male friends, and/or to console themselves with the transitory therapeutic fixes offered by drugs, drink, casual sex and gambling. While this by no means applies to all men, and some of these pursuits (especially passing time with other men) can be an important source of networking and securing resources, others add up to evasion of crucial responsibilities, which, in the process, can compound problems for the rest of their households. For example, where men become ill or unable to work as a result of prolonged drinking, infections picked up through liaisons with other sexual partners, commercial sex workers and so on, the burden for upkeep falls on other household members, who may be called upon to provide healthcare in the home, and/or to pay for pharmaceuticals and formal medical attention (see Chant, 1997a). This is particularly typified in the case of HIV-AIDS-affected households, where even if women do not have the disease themselves, they often suffer a major loss of income as well as having to bear the brunt of caring for the sufferers (Delamonica *et al.* 2004:23; UNDP, 2005).<sup>6</sup>

Although, as documented earlier, some women faced with pernicious behaviour on the part of male partners are able through design or default to break away from these situations and set up their own households. However, others may not be in the position to do so, and are

rendered more vulnerable than ever to extremes of servitude and inequality. This may be endorsed by culturally-condoned expectations of female altruism – a woman who opts for another – more egoistic course – is not deemed ‘feminine’, and the consequences can be severe, including non-marriageability, divorce or separation. As Kabeer (2005:14) has argued: ‘Gender often operates through the unquestioned acceptance of power. Thus women who, for example, internalise their lesser claim on household resources, or accept violence at the hands of their husbands, do so because to behave otherwise is considered outside the realm of possibility’. As further articulated by Sweetman (2005:2): ‘Solving material poverty is not possible for women who lack the power to challenge the discriminatory policies of social institutions, ranging from the family to the state’. I also sense that some women attempt to compensate for ‘encroaching’ on ‘male terrain’ such as when they take-up paid work, by re-doubling their efforts to live up to altruistic ideals attached to idealised norms of ‘good wives’ and ‘dutiful daughters’. This not only helps to reaffirm their ‘femininity’, but also to defuse the conflict which so often erupts when men feel threatened by changes in women’s activities (see also below).<sup>7</sup> And, as women seem to be making recourse to ‘traditional’ feminine ideals in a time of transition, so too men’s declining commitments to, and investment in, households’ daily war against poverty may well derive from a perceived need among men to assert elements of ‘traditional masculine behaviour’ over which they still have some control -- and which women may tolerate through their own perceptions of how men should be (see Chant, 2000; Chant with Craske, 2003:Chapter 1). Whatever the case, the patterns described endorse Whitehead’s (2003:8) observation that: ‘...men and women are often poor for different reasons, experience poverty differently, and have different capacities to withstand and/or escape poverty’.

Summing up this third element of a ‘feminisation of responsibility and obligation’, while we know a reasonable amount about women’s poverty in the labour market, and to some extent in the home too, domestic issues have not been given as much attention as they merit. Aside from gender inequalities in incomes and consumption, gender differences in time and labour inputs are also important, and of particular significance to a ‘feminisation of poverty’, however defined, is that the onus on women to cope is increasing. This is not only because they cannot necessarily rely on men and/or do not expect to rely on men, but because a growing number seem to be supporting men as well. Also disturbing is that women are forced into accepting rather than challenging these mounting responsibilities in a spirit of quiet and self-sacrificing acquiescence. While recourse to ‘traditional’ norms of female altruism in a time of transition may be a tactical gesture to ensure household survival, the danger is that women will have to carry on assuming more responsibilities with severe costs to their personal health, well-being and material circumstances.

*(iv) Increasing disarticulation between investments/responsibilities and rewards/rights*

Leading on from this, a fourth element in my proposed ‘feminisation of responsibility and obligation’ is that while responsibilities for dealing with poverty are becoming progressively feminised, there seems to be no corresponding increase in women’s rights and rewards. Men, on the other hand, despite their lesser inputs, are somehow managing to retain their traditional privileges. This presents us with a rather puzzling, not to mention worrying, scenario in which investments are becoming progressively detached from rights and rewards, and conceivably evolving into a new and deeper form of female exploitation. If analysis has not come to grips with this as yet, this is perhaps truer still in respect of policy.

## **B) Policy problems**

Leading on from these analytical concerns and observations, I detect six major problems for policy deriving from current constructions of the ‘feminisation of poverty’ and the interventions it has given rise to are as follows:

### 1) Poverty reduction and reduction in gender inequality not one and the same

Despite the fact that the ‘feminisation of poverty’ seems to have commandeered some resources for women, merging the concerns of poverty alleviation and reducing gender

inequality is by no means straightforward. As noted by Jackson (1996) gender and poverty are distinct, albeit overlapping, forms of disadvantage. Two birds cannot necessarily be killed with one stone, and the danger is that poverty reduction will override any significant move to change gender relations or inequalities. Indeed, there is probably need for a major re-think about the desirability of linking poverty reduction and GAD, when in practice women's empowerment seems to be more of a 'by-product' or 'side issue' of poverty reduction than the other way round.

## 2) Competing/contradictory interests of GAD stakeholders and poverty stakeholders

A related concern with the mounting alliance between gender equality and poverty reduction is the differences in theoretical and political goals motivating gender and poverty stakeholders. As pointed up by de Vylder (2004:85), while the pursuit of gender equality has usually been regarded within the GAD community as an end in itself and from a human rights perspective, pursuing gender equality as a means to achieve poverty reduction – especially among economists -- is of a more instrumentalist nature and grounded in efficiency considerations. One aspect of efficiency is the desire to cut-costs, which often takes the form of scaling down universal programmes in favour of targeted initiatives. Another is to target resources to groups who are likely to produce the greatest benefit for the greatest number. Focusing on poor female heads of household, or even poor women in general clearly presents a cost-effective option given the belief that resources directed to women offer the best chance of maximising the well-being of families as a whole (ECLAC, 2004b: 55; Molyneux, 2006a,b). Indeed, repeated emphasis on the links between women and poverty in analysis and advocacy, and the idea that investing in women is one of the most efficient routes to ensuring all-round development benefits, seems to have translated into a generalised bid to alleviate poverty primarily, or even exclusively, through women (see Molyneux, 2001:184; Pankhurst, 2002; Razavi, 1999:419). Here we get the unfortunate but all too common scenario where instead of development working for women, women end up working for development (see Blumberg, 1995:10; Elson, 1989, 1991; Kabeer, 1994:8; Moser, 1993:69-73).

The tendency to orient anti-poverty resources to women has been particularly marked under neoliberal restructuring, giving rise to the conclusion that while the 'feminisation of poverty' has undoubtedly had a major and positive impact in terms of GAD, it has also served neoliberal interests. Using women to achieve more effective poverty reduction reflects an instrumentalism whereby the returns and 'pay-offs' from investing in women tend to prevail over women's rights (see Jackson, 1996:490; Kabeer, 1997:2; Molyneux, 2001:184,2006b; Razavi, 1999:419; also World Bank, 1994, 2002). As summarised by Molyneux (2006b):

'Women have much to contribute to anti-poverty programmes. Their gendered assets, dispositions and skills, their inclination towards involvement in household survival and at community level, and their precarious relationship to the wage economy, all help to make them appear a peculiarly suitable ally of anti-poverty programmes. This is not least because they also represent an army of voluntary labour, and can serve as potential guardians of social capital.....

These gendered assets and dispositions are being increasingly recognised by the international development agencies, but so far this has not brought significant material benefits to the women involved. The costs many women bear through juggling these multiple responsibilities in terms of weak labour market links, lack of support for carework and long-term security are rarely taken into account. Prevailing policy assumptions still tend to naturalise women's "roles" and seek to make use of them and influence how they are developed and managed subjectively and situationally'.

In light of this it is not hard to see how '... some programmes to combat poverty reproduce patterns of discrimination, since women are used as unpaid or underpaid providers of family or social welfare services, and are only marginally treated as autonomous individuals entitled to rights and benefits related to activities designed to improve their quality of life'



(ECLAC, 2004b: 54; see also Bradshaw and Linneker, 2001; González de la Rocha, 2003:25; Molyneux, 2002,2006a).

### 3) Women as 'victims'

Leading on from this, another unfortunate by-product of 'feminisation of poverty' orthodoxy is that it tends to present women as 'victims', with Johnsson-Latham (2004b:38) arguing that perceptions of the vulnerability of women often means they get 'special support', rather than 'equal rights' (see also Bibars, 2001; ECLAC, 2004b:58).

### 4) Neglect of domestic gender inequalities

Another policy-related problem is that linking of the feminisation of poverty to female household headship means that this can either favour the targeting of women-headed households at the expense of women in general, or to address 'women's issues' as if domestic gender relations had no part to play in female privation (see Chant, 2003a; Feijoó, 1999:165; Jackson, 1996,1997; Kabeer, 1996; May, 2001:50). As noted by Davids and van Driel (2001:162):

'What is implied is that female-headed households are poorer than male-headed households. The question that is not asked, however, is whether women are better-off in male-headed households. By making male-headed households the norm, important contradictions vanish within these households, and so too does the possibly unbalanced economical (sic) and social position of women compared to men'.

While there is nothing wrong with providing assistance to poor female heads of household who clearly have problems to contend with, including a limited asset base in terms of labour, incomes, property and so on (see Bradshaw, 2002:12), their counterparts in male-headed households may actually end up in the same position due to restricted access to and control over household assets (ibid.; see also Budlender, 2002:8; Linneker, 2003:4). Yet despite this, and considerable evidence of 'secondary poverty' in male-headed households (see Bradshaw, 1996; Chant, 1997a; Fukuda-Parr, 1999; González de la Rocha and Grinspun, 2001), intra-household power relations have rarely been broached in anti-poverty programmes.

### 5) Missing men... (again)

Leading on from this, beyond frequent lack of recognition of the heterogeneity of women, is the fact that men and gender relations remain absent from policy responses to women's poverty, despite the significant role played by men in women's lives, and growing recognition that gender projects and policies are often limited in their benefits when they are directed exclusively to women (see Chant and Gutmann, 2000; Cornwall, 2000; Cornwall and White, 2000). Indeed, potential benefits all too easily become burdens when direct and indirect strategies to enhance women's access to material resources simply increase the loads they bear and/or the demands made upon them. In many ways, what ECLAC (2004b:56) has termed the 'feminisation' of anti-poverty programmes, carries some extremely adverse consequences. As underlined by UN/UNIFEM (2003:19):

'One might even argue that the economic and social reproductive realms which women are expected to tread, overextend the range of roles and responsibilities of women compared to men, which does not necessarily enlarge their life choices, but may even limit them'.

The practice of using women as what Molyneux (2005a,b) has termed a 'conduit of policy', whereby resources channelled through them are expected to translate into improvements in the well-being of their children and other family members, is in abundant evidence. One example is the *Progresas/Oportunidades* programme in Mexico. This makes cash transfers and food handouts conditional on 'co-responsibility' on the part of communities to ensure children's school attendance and health (through taking them for medical check-ups, participating in health workshops and so on). In relying heavily on mothers, and making

little effort to involve fathers in any of the unpaid volunteer work<sup>8</sup>, the programme has ‘built upon, endorsed and entrenched a highly non-egalitarian model of the family’ (see Molyneux, 2006a,b).

Similar patterns of loading parental responsibilities for poverty alleviation onto women can be discerned in Costa Rica, whereby the targeting of resources to lone and partnered mothers on low incomes has occurred under at least two flagship ‘gender and poverty’ programmes since the mid-1990s, notably the ‘Comprehensive Training Programme for Female Household Heads in Conditions of Poverty’ (*Programa de Formación Integral para Mujeres Jefas de Hogar en Condiciones de Pobreza*), and ‘Creciendo Juntas’ (‘Growing Together’) (see Chant, 2002, 2006a: Chapter 6). Despite the fact that both these schemes have nominally been ‘empowerment’ orientated and have comprised modules in ‘*formación humana*’ aimed at sensitising women to constructions of gender and human rights, the exclusion of men may well have compromised any gains women may otherwise have made in respect of power or autonomy. Despite some discussion of including men in ancillary programmes to help ensure the exercise of women’s and children’s rights, and to stimulate more cooperative family patterns, nothing has got off the ground as yet. This may not just have perpetuated, but exacerbated, prevailing tendencies among men to avoid assuming responsibilities for their children’s upkeep (ibid.).

Additional dangers of excluding men are that this can fuel gender rivalry or hostility, with evidence indicating that growing pockets of male social, educational and economic vulnerability can manifest itself in violence in the home and in the community, in drug or alcohol abuse and other forms of disaffected behaviour (see Chant and Gutmann, 2000; Khundker, 2004; Moser and McIlwaine, 2004; Molyneux, 2006a; UNESCO, 1997:6).

In short, the common policy reaction to the ‘feminisation of poverty’ which is to focus on women, tends to translate into single-issue and/or single group interventions which have little power to destabilise deeply-embedded structures of gender inequality in the home, the labour market, and other institutions. As articulated by Baden (1999:7): ‘The “feminisation of poverty” argument is not helpful if it is used to justify poverty reduction efforts which uncritically target women-headed households or even “women” in general, but which do not challenge the underlying “rules of the game”’.

This leads me onto my sixth and final point regarding the problems of policy interventions which marry poverty reduction with women’s empowerment, namely that women’s power to negotiate their burdens is not being addressed... or at least effectively.

#### 6) Missig ‘real’ empowerment...

Although empowerment is a problematic and highly contested term (see Kabeer, 1999, 2005; Parpart, 2002), the main thrust of empowerment interventions policy-wise has been to enhance women’s access to material resources as a means to increase their capacity to make choices (see UNDP, 1995; UNIFEM, 2000).

Yet as Johnson (2005:77) points-up on the basis of earlier work by ECLAC, most mainstream poverty programmes are rather more preoccupied with addressing the condition of poor women, than their position, the former referring to people’s material state and the latter to their position in society. In turn, steps to improve women’s poorer condition have rarely challenged men’s condition or position (ibid.[emphasis in original]). Thus even where programmes nominally make women, rather than their children, a priority, and aim to enhance women’s economic resources, such orientations are unlikely to achieve little in themselves, since as Johnson (2005:77) notes: the “feminisation of poverty” is ... an issue of inequality that extends to the very basis of women’s position in economic relations, in access to power and decision-making, and in the domestic sphere. It is emphatically not addressed in a sustainable manner solely by measures to improve the material conditions of women’ (see also Sweetman, 2005:6).

Despite the best-intentioned efforts of even the most rounded programmes designed to alleviate poverty and empower women, there is clearly a long way to go in respect of enhancing women's ability to negotiate greater gender equality, especially at the domestic level. For example, ECLAC (2004b: 29) identifies that education does not seem to be leading to greater decision-making equality, and even with greater earning potential, women do not necessarily find themselves 'empowered' to strike new deals for themselves within households, but merely burdened with more obligations (Chant, 2006a: Chapter 7). Indeed, women are apparently still, if not more, encouraged to be altruistic and family-oriented as their education, skills and access to economic opportunities expand (ibid.). In the Gambia, for example, where as a result of dedicated policy initiatives to address gender inequality and poverty young women are beginning to enjoy increased access to education and employment, lack of gender sensitisation among men or among their elders means that familial claims on their newly-acquired human capital act to depress their possibilities of personal mobility (ibid.: Chapter 4). In the meantime, men's individualism, and their entitlements to the fruits of female labour as well, continue to be tolerated. As mentioned earlier, women's duty towards others is rarely questioned, which is partly to do with an aforementioned resilience of culturally-condoned expectations of female altruism and servility.<sup>9</sup> Yet if we are to accept that poverty and human rights are integrally linked, women's rights to stand up for themselves and to negotiate social expectations of their roles in the family are fundamental. As affirmed by the Asian Development Bank (2002:xvi-xvii): '...poverty is increasingly seen as a deprivation, not only of essential assets and opportunities, but of rights, and therefore any effective strategy to reduce poverty must empower disadvantaged groups, especially women, to exercise their rights and participate more actively in decisions that affect them'.

While some of the rhetoric around women's empowerment and poverty alleviation is, on the surface, encouraging, in practice another scenario presents itself. Women's seeming inability to challenge the inordinate responsibilities they are now carrying, and to negotiate their way out of subordination and inequality at the domestic level, appears to be an amalgam of various elements pointed up thus far, notably, the unilateral focus on women in 'gendered' poverty programmes which "exploits" the social image of women as dedicated to serving others' (ECLAC, 2004b: 55; also Molyneux, 2006a,b), the exclusion of men, a bias towards women's condition (incomes) as opposed to position (power), and a palpable reluctance on the part of policy-makers to engage in what Jackson (1997:152) terms 'intra-household "interference"'.

#### **IV. A CASE FOR REVISING THE 'FEMINISATION OF POVERTY'?**

By way of conclusion I would like to end with one or two reflections about possible revisions to the 'feminisation of poverty' concept.

In respect of the concept of the 'feminisation of poverty', I do not think there is either a) sufficient data, or b) theoretical or practical desirability, to continue using the term as it is currently construed and deployed i.e. with an implicit (and sometimes exclusive) focus on women's monetary poverty and an overemphasis on female household headship.

Lack of appropriate sex-disaggregated panel data make it impossible to establish how many women are poorer than men, and how much poorer they are, not to mention how gendered gaps in income are evolving over time. While better sex-disaggregated income data would be a welcome step forward, income, as we know, is only part of the poverty equation, and on its own is of limited use either for analysis or policy (see Fukuda-Parr, 1999).

The effective redundancy of the 'feminisation of poverty' methodologically and analytically presents us with two choices. Either we abandon the existing terminology – and perhaps substitute it with something like the 'feminisation of responsibility and/or obligation' or the 'feminisation of survival', or we retain the term but make it clear that the poverty part of the construct refers not just to income but other, albeit related, privations.

Obviously there is a major question about how broad the definition of poverty can go before it gets too diffuse and unwieldy to deal with methodologically, conceptually and in terms of policy. Indeed, if the definition goes too wide, a case for revised nomenclature may indeed be pertinent. However, if possible I feel we should stick with the 'feminisation of poverty' for three main reasons:

- I. The term is already known, and there is nothing to stop it evolving into a more elaborate concept;
- II. It has had proven impacts on going some way to 'engender' poverty reduction strategies;
- III. It could be said that a 'feminisation of poverty' is occurring if we embrace a broader take on poverty which comprises the notion that poverty is not just about incomes, but inputs, and which highlights not women's level or share of poverty, but their burden of dealing with it.<sup>10</sup> Dealing with poverty is arguably as onerous and exploitative as suffering poverty (as well as exacerbating the latter), especially given the mounting disparities in gendered investments in household livelihoods and the rewards derived.

So which criteria should we be emphasising in a 'new look' 'feminisation of poverty' which more accurately reflects the parameters of contemporary gendered disadvantage?

Disregarding concerns about overloading the definition of poverty with too many dimensions, we have to recognise that what we can include to evaluate and substantiate trends in gendered poverty over time is highly contingent on available data. Sex-disaggregated statistics are extremely limited at present, and however true UNIFEM's (2002:55) statement that sometimes these exist, the only challenge being to 'liberate data from the files of national statistical offices', as well as to make information available in 'easy to use forms' (ibid.:56), there will undoubtedly be some need for states to produce new data, and this will have major resource implications, financially and capacity-wise (World Bank, GDG, 2003).

This said, in order to build up an effective base for longitudinal comparisons, an essential starting point, given the undoubted importance of income to poverty assessment, is to improve coverage and quality of sex-disaggregated data on material poverty. Where possible this should follow ECLAC's lead in enumerating women and men in households below the poverty line), as well as providing poverty assessments of female and male headship which use per capita rather than aggregate household income data. A desirable complement to this would be to generate a sex-disaggregated database of 'asset poverty', commencing at the very least with material assets such as land and property ownership, which have been identified by the UN Millennium Task Force on Education and Gender Equality as warranting consideration as an indicator in MDG 3 on promoting gender and empowering women (see UNMP/TFEGE, 2005:10 & 18; see also Durbin, 1999).

Related to concerns around the costs of time and inputs, more information is also needed about the economic returns to women's and men's labour. In respect of income-generating activities, for example, we must go beyond statistics on gender differentials in earnings in the formal labour market (as encapsulated in existing gender indicators such as the GEM), and make more efforts to document remuneration in the informal sector. This accords with another suggestion by the Task Force on Education and Gender Equality who propose an indicator in MDG 3 which covers gender gaps in earnings in both waged and self-employment (UNMP/TFEGE, 2005: Box 1).

Further efforts to assign a monetary value to reproductive labour are also essential, since the statistical invisibility of 'the sexual division of labour', or the assignment of household chores and unpaid care work to women means that 'women are overloaded with work whose value is not socially or economically recognised' (ECLAC, 2004b:2):

'The fact that monetary value is not placed on unpaid domestic work, and that methods for measuring household poverty do not incorporate an attribution of income in this category in

households where one person is entirely dedicated to domestic work and care, limits the ability of traditional measures of poverty to capture gender inequalities' (ibid.:19).

This is not just important for analysis, but for policy too. At present reproductive labour is thought to come 'free', and is 'naturalised' as 'women's work' (see Molyneux, 2006a,b), '...policymakers often assume that there is a limitless supply – that they can have as much as they want' (Budlender, 2004:38). In truth, however, supplies are not limitless, and levels and quality of care can suffer when women become overburdened (ibid.). To not count women's unpaid work also puts them at a disadvantage in respect of their rights to the equitable sharing of benefits generated through remunerated and non-remunerated labour in households (ibid.:59-60; also UNDP, 1995:98).

Despite these self-evidencies, quantifying and assigning a value to women's work outside the realm of the formal paid economy represents one of the biggest methodological challenges of the 21<sup>st</sup> century (see Benería, 1999; Budlender, 2004; UNDP, 1995; WEDO, 2005).<sup>11</sup> While a number of approaches have been devised, which range from attempting to match the particular type of unpaid labour performed by its corresponding market price, to assessing the opportunity cost of doing unpaid labour instead of participating in the paid sector (see Box 3), none is without problems. While focusing on persons, as in the opportunity cost approach, assigns different values to the unpaid work performed according to who does it, approaches which attempt to use average wages according to activity, are likely to depress the general value of the work because paid reproductive labour (whether cleaning, cooking, care of the young, elderly and infirm and so on), tend to be feminised occupations, and as such to command low wages. A further difficulty arises in respect of how to factor in the simultaneous performance of different unpaid (and paid) tasks, and issues around work intensity (see Floro, 1995).<sup>12</sup>

#### **DIFFERENT APPROACHES TO ASSIGNING ECONOMIC VALUE TO UNPAID CARE WORK**

##### **The mean wage approach**

Calculates the average hourly wage in the economy as a whole, usually on a sex-disaggregated basis, and assigns this to unpaid care work. Can lower the overall estimated value of unpaid work a) because women usually perform more unpaid care work than men, and b) the mean female wage is generally lower than the mean male wage.

##### **The opportunity cost approach**

Calculates the value of unpaid care work by estimating what the person has forfeited by doing unpaid care work instead of working in a typical remunerated activity for someone with their particular educational and skill set. Poses difficulties in that since the opportunity cost of a university graduate doing unpaid care work is estimated as higher than someone with less education, it confers different values to unpaid care work according not to the activity performed, but to the person performing it. Another problem relates to the determination of what wage to use when people are normally unemployed and unwaged, or work in subsistence production.

##### **The generalist approach**

Calculates the mean wage of workers in the paid economy whose functions and circumstances best match those performed by persons in the unpaid sector. For example, childcare, the wages of crèche workers, for housework, paid domestic helpers and so on.

##### **The specialist approach**

Focuses on the activity as opposed to the person performing the activity at a more disaggregated level than the generalist approach. For example, values unpaid cooking time at the wage of a paid chef or cook, cleaning at the value of the wage of a paid cleaner and so on.

*Source: Budlender (2004: 23-37)*

Another critically important contribution to enhancing understanding of gendered dimensions of poverty may be to collect data not only on what women and men in poor household earn (or manage), but what they spend their money on, and/or the extent to which this expenditure is devoted to collective basic household needs, or is reserved for personal spending.

Beyond this, and in line with trying to keep track of the 'feminisation of responsibility and obligation', we obviously need to move beyond economic data per se. A crucial issue in investigating and mapping gendered poverty in a more rounded fashion is undoubtedly for more and better quality data to be collected on time-use. Although Corner (2002:2-3), argues that the generation of time-use data of a form and quality suitable for policy purposes is a 'complex and necessarily expensive task', it is essential in addressing the question of women's well-being, as well challenging the persistent invisibility of much of women's contribution to developing country economies (see Floro, 1995).<sup>13</sup> This is particularly important for policy, since women are often inappropriately loaded with the task of solving poverty, and as noted by Elson (1999b:13): 'Women's time burdens are an important constraint on growth and development - women are an over-utilised not an under-utilised resource. The benefits of reducing this gender-based constraint can be considerable' (my emphasis).

In addition to the above suggestions, I think it is also vital that more efforts are made to incorporate the views on what is important to the assessment of poverty of poor women themselves through participatory or 'self-rating' poverty exercises. As noted by May (2001:24), for example, in many countries, poverty is construed as being 'relational rather than absolute', and poverty definitions at the grassroots extend well beyond considerations of physical survival to incorporate notions of 'exclusion, powerlessness and stigma'. As echoed by Kabeer (2003:80): 'The well-being of human beings, and what matters to them, does not only depend on their purchasing power, but on other less tangible aspects, such as dignity and self-respect' (see also Painter, 2004:18; Rojas, 2003). Such issues are generally glossed over in more 'top-down', quantitative evaluations of poverty. For example, in relation to female household heads who are condemned as poor by objective measures, Davids and van Driel (2001:166) point out that these often '....appear as an objective category of households in which the subject position of the female head vanishes completely as does the socio-cultural and psychological meaning that their status has for them personally'.

Participatory Poverty Assessments (PPAs) have made a number of important contributions to engendering poverty analysis, notably by highlighting factors such as women's greater burden of 'time poverty', their vulnerability to domestic violence, and unequal decision-making (Kabeer, 2003:99). PPAs have also revealed that perceptions of poverty at the household level are wont to differ by gender insofar as men usually define poverty as a lack of assets whereas women equate poverty with shortfalls in consumption, coupled with inability to 'provide for the family' (May, 2001:27). In the 'Voices of the Poor' study carried out by the World Bank, men frequently defined poverty in terms of lack of respect and self-esteem, yet 'no women seem to have regarded themselves entitled to make demands for respect and self-esteem'. Instead, most poor women stated that 'the worst form of poverty was inability to feed their children' (Johnsson-Latham, 2004b:23).

Yet it is also important that PPAs become more participatory and more inclusive if they are to provide a genuine platform for poor women to contribute to the data and tools intended to assess disadvantage. At present, for example, the tendency to leave PPA data as 'raw' rather than 'interpreted', can ignore or obscure the significance of gender differences and their meanings (Razavi, 1999:422; also Baulch, 1996; McIlwaine, 2002; Whitehead and Lockwood, 1999). Moreover, not all participatory assessments even make reference to gender issues. This, in turn, is partly because PPA methodology is subject to the relative 'gender-blindness' or 'gender-awareness' of its facilitators (Kabeer, 2003:101). While, in principle, for example, PPAs promise greater degrees of empowerment and subjectivity, the question

of who is selected, encouraged, and/or available to participate at the grassroots can affect the picture. Even if women as well as men are involved in consultations, the internalisation of gendered norms may mean that gender is concealed or downplayed (ibid.:102; see also Cornwall, 2003). Moreover, where data are aggregated (in the interests of presentational simplicity, or for the purposes of policy formulation, for example), losses in gender-relevant information can occur through the biases of researchers and analysts (Kabeer, 2003:102; see also Johnsson-Latham, 2004a). For example, aggregate summaries from PPAs could be much more explicit about gender-specific dimensions of poverty which appear in the 'raw' data (see Box 4). The quality of interpretation could also be strengthened by more dedicated efforts to 'triangulate' participatory findings with other, 'objective', criteria (see Razavi, 1999:422), or existing standard qualitative gender analyses (in the form of case studies and so on) which focus on gendered relations and processes as well as outcomes (see Whitehead and Lockwood, 1999:539).<sup>14</sup>

**'ENGENDERING' PPA AGGREGATE SUMMARIES: SUGGESTIONS RELATING TO THE WORLD BANK STUDY 'VOICES OF THE POOR'**

*Current summary (gender-neutral)*

*Potential addition (to highlight gender dimensions)*

<b><u>Expression of poverty</u></b>	<b><u>How Women and Men are affected</u></b>
Hunger	Women eat least and last in many regions
Disease (including HIV, alcoholism)	Women's reproductive health is neglected. Men's care costs more Men's own actions increase risks
Lack of income	Few poor women have an income
No land/property	Few women own/control land or assets Property is taken from widows
Violence/insecurity	Most poor women are victims although many young men and/or men involved in crime also suffer male violence
Exclusion from decision-making	Women excluded because of their sex
Lack of water, electricity, roads	Increase in women's workloads
<b><u>From Poverty to Resources</u></b>	<b><u>Women/men</u></b>
From isolation to resources	Eliminate discrimination with regard to land and so on.
From sickness to health	Special attention to women's health, including reproductive health Action to combat root causes of men's alcoholism
From fear to security	Combat violence against women and ensure land rights for women
From corruption to rule of law	Legal education, support to women's groups, equal rights

Source: Johnsson-Latham (2004a: 12-13)

Last but not least, another aspect of the 'feminisation of poverty' thesis in need of an overhaul is its present bias towards female household headship. While female households heads could be seen as an extreme case of 'choicelessness' and 'responsibility' – in having little option other than to fend for themselves and their dependents and on potentially weaker grounds given gender discrimination in society at large, this needs to be qualified:

- a) because female-headed households do not necessarily lack male members;

b) free of a senior male ‘patriarch’, their households can become ‘enabling spaces’ in which there is scope to distribute household tasks and resources more equitably, and

c) women in male-headed households may be in the position of supporting not only children, but spouses as well, with a noted tendency for some men to be moving from the position of ‘chief breadwinner’ to ‘chief spender’.

While household headship should definitely be retained as a criterion of differentiation in a broader but more nuanced thesis, we also need to know which sub-groups of female-headed households are especially vulnerable to poverty (for example in relation to stage in the life course, composition, marital status and so on – see Lampietti and Stalker, 2000:25), as well as what other axes of difference among women more generally, including age and ethnicity – place them at particular risk of vulnerability and privation. As discussed earlier, age-disaggregated data is vital in respect of gaining some purchase on generational trends in gendered poverty.

## V. POSSIBLE POLICY DIRECTIONS

Leading on from this, while interventions to reduce women’s poverty have clearly begun to respond to new directions in poverty analysis (i.e. to have become more holistic and shifted from the economic to the social), and have arguably moved into a new gear (and back from the social to the economic) given increased experimentation with ‘gender budgets’ at national and local levels (see Elson, 1999b; UNRISD, 2005:60), much remains to be done in respect of determining different types and experiences of gendered poverty. As articulated by Gangopadhyay and Wadhwa (2003:2-3):

‘If poverty incidence reflects a gender bias it is important to investigate where it originates. If it is in the workplace, such biases have to be fought differently from the case where it originates within the household. If the bias is in workplace, policy measures such as affirmative action may be a way out. On the other hand, if the bias against the girl child originates in the household, policies must aim at improving awareness within the family. To combat the first one requires a strict enforcement of laws. The second is a deeper social problem and laws alone may not help’.

While acknowledging that ‘...changing gender cultures is a long-term process and not immediately tractable to government policies and projects’ (Jackson, 2003:476), it is also the case that enactment of legislative provisions in the domestic sphere has traditionally been extremely hesitant. ‘The family’ persists in being regarded as a ‘private sphere’ beyond the bounds of state interference, in which calls for equality are secondary, if not antithetical, to respect for culture, tradition and custom. For these reasons, and with the possible exception of domestic violence, initiatives relating to internal dynamics of home and family have often been left out of the frame in poverty reduction programmes (see Chant with Craske, 2003: Chapter 7). Nonetheless, it is equally important to recognise that an implicit recognition of family drives the agenda for reducing women’s poverty, given the prospective spin-offs for all-round improvement of welfare. Building on Abeysekera’s (2004:7) argument with respect to the MDGs, that without acknowledging the family, it is unlikely that any major changes in women’s position will be effected, it is arguably critical to take family into account in future attempts to reduce poverty and gender inequality. As Jackson (2003:477) has argued: ‘...rather than wishing the family or household away, more detailed understanding of them is necessary’.

In this regard, two ‘family-oriented’ strategies which might be useful in complementing existing approaches to alleviating poverty among women at the same time as enhancing their empowerment are first, public support for parenting and unpaid care-work, and second, equalisation of responsibilities and power at the domestic level (see Chant, 2003a,b)..

On a final note, the ‘feminisation of poverty’ has been a ‘good thing’ insofar as it has made women visible in poverty discourses and upped their profile in anti-poverty initiatives. Re-



cast in such a way that the multidimensional nature of poverty and its gendered dimensions are taken on board as part and parcel of a more gender-sensitive 'feminisation of poverty' construct, we have a useful maxim to secure resources for women. None the less, and to return to a point made earlier, in continuing to talk about a 'feminisation of poverty' (or even a 'feminisation of responsibility and obligation'), we must not miss what is conceivably the main point, which is the masculinisation of wealth and privilege. As the pendulum swings towards women's increased capabilities and opportunities, there seems to be an infinite reservoir of props for asserting masculinity, and remasculinising advantage. If there is a masculinisation of privilege going on, then we need to not only focus our attention on the 'female victims, but men, and more importantly, the structures which uphold men's advantage, just as we need to confront wealth if we are to address poverty. As argued by Murphy (2001:32): 'The task of poverty eradication is to eradicate the structures that create and depend upon poverty itself, rather than fix the people who are vulnerable to poverty. The people are transitory, the place is permanent ... if we are to confront the effects of poverty we must confront wealth and its privilege' (see also Chambers, 2001; Wichterich, 2004:64). This not only involves taking into account men and gender relations, but addressing the models which are guiding the direction of economic development nationally and internationally.

## NOTES

1. Funding for this research has been provided by a Leverhulme Major Research Fellowship (2003-6) (Award no. F07004R), to whom the author is grateful for support. The fieldwork has comprised individual interviews and focus group discussions with 223 low-income women and men in different age groups in The Gambia, the Philippines and Costa Rica, and an additional 40 interviews with professionals in NGOs, government organisations and international agencies. For assistance in the field I would like to thank Baba Njie (The Gambia), Tessie Sato, Josie Chan and Fe Largado (Philippines), and Enid Jaén Hernández, Luis Castellón Zelaya and Roberto Rojas (Costa Rica). For comments on an earlier draft of this paper, I am indebted to Cathy McIlwaine, Maxine Molyneux, Diane Perrons and Silvia Posocco.
2. The estimated total of world poor (based on the population living on less than US\$ 1 a day) is now 1.5 billions (Lopez-Claros and Zahidi, 2005:4).
3. Violence tends to be statistically invisible despite the fact that it exacts a heavy economic toll in terms of costs and instability not only on individual households but on society at large (World Bank, 2003:7; also WEDO, 2005). As highlighted by ECLAC (2004b:26) for the Latin American region: 'A thorough understanding of poverty must include an analysis of violence as a factor that erodes personal autonomy, the exercise of citizenship and social capital (social autonomy), the latter as a result of the isolation to which women are subjected. This is consistent with the definition of poverty as the lack of minimum survival conditions...One the one hand, poverty is a risk factor that makes the appearance of physical violence in the home more probable. In addition, violence produces more poverty, since it holds back economic development for a number of reasons: (i) dealing with the effects of both social and domestic violence requires spending on the part of the police, judicial and social services systems, and (ii) in the case of women, those who suffer domestic violence are less productive at work, which leads to a direct loss to national production'.
4. This has some resonance with Saskia Sassen's (2002) notion of a 'feminisation of survival' observed in the context of international migration. Sassen points out that not only households, but whole communities, and states, are increasingly reliant on the labour efforts of women, within as well as across national borders.
5. The term 'feminisation of responsibility and obligation' is not as succinct or 'catchy' as the 'feminisation of poverty' or the 'feminisation of survival', and I may revise this in due course. However, I find the term useful in respect of working through the ways in which women are most affected by poverty. The 'feminisation of responsibility' is intended to convey the idea

that women are assuming greater liability for dealing with poverty, and the 'feminisation of obligation', that women have progressively less choice other than to do so. 'Duty' is implicated in 'obligation', with the salient aspects being that women have less scope to resist the roles and activities imposed on them structurally (for example through legal contracts or moral norms), or situationally (through the absence of spouses or male assistance), and that duty often becomes 'internalised', perceived as non-negotiable, and binding.

6. It is also important to note a tendency towards a 'feminisation of HIV/AIDS' in an increasing number of countries, especially in sub-Saharan Africa. In many respects this process reflects women's lack of power to negotiate the terms of their sexual relationships, especially in situations of poverty. I am grateful to Maxine Molyneux for drawing my attention to this point.

7. That an ostensible reaffirmation of femininity may be a short-term strategy for women to improve their longer-term 'fall-back' position has been noted by Gates (2002) in the context of Mexico, where some women offer to do more unpaid work in the home as a means of getting their husbands' permission to take employment.

8. Unpaid volunteer work undertaken by PROGRESA beneficiaries included community activities such as cleaning schools and health centres, which could take up to 29 hours a month (Molyneux, 2006b)

9. It is interesting to consider the role that (gender) policy has played here – the resilience of traditional gendered norms being perhaps not so surprising given Molyneux's (2006a,b) point that rather than being 'gender-blind', social policy has historically been based on 'deeply gendered conceptions of social needs'. As claimed by Molyneux (2006b): 'In Latin America as elsewhere in the world, gender bias and masculine prerogative has prevailed in social policy as in social life more generally, with entitlements resting on culturally sanctioned and deeply rooted notions of gender difference and patriarchal authority. These have generally accorded with idealised assumptions about the asymmetric social positions occupied by the sexes with male breadwinners and female mother-dependents receiving benefits according to these normative social roles. Such assumptions have proved remarkably universal and insistently enduring even where, as in Latin America, gender divisions have been challenged by married women's mass entry into the labour force and by equal rights legislation'.

10. The notion that the 'feminisation of poverty' should entail considering what people do, as well as the income they have, is at least being verbalised by some organisations. As articulated by the National Commission on the Role of Filipino Women (2002:11) in their *Framework Plan for Women*, for example: 'It is widely considered that there is a rising trend towards the feminisation of poverty. This is because they are the ones mainly responsible for the welfare and survival of households under conditions of increasing poverty'.

11. Notwithstanding immense difficulties of approximation, in 1995 the UNDP estimated that the combined value of the unpaid work of women and men, together with the underpayment of women's work in the market was in the order of \$16 trillion US, or about 70 % of global output. Of the \$16 trillion identified, approximately \$11 trillion was estimated to be constituted by the 'non-monetised, invisible contribution of women' (UNDP, 1995:6).

12. Although the most recent revision of the System of National Accounts (SNA) in 1993 favoured the inclusion of subsistence production in the calculation of GDP, unpaid care work continues to be excluded. The grounds for this are the prospective 'distortion' of accounts, rendering them less useful for market analysis and policy purposes, that unpaid care work is difficult to quantify, that the data required are not available, and that the sudden inclusion of unpaid care work would complicate GDP comparisons over time (see Budlender, 2004:16). One suggestion has been to set up a 'satellite' account for unpaid care work which would be parallel to the 'core' national accounts, although the dangers are that this will marginalise women's unpaid care work in relation to 'mainstream' national production (ibid.:45).

13. Even use of the simple '24 hour day model' in which participants are asked to describe the use of time by women and men in their own or other households on a typical day, has been critical in underlining the fact that 'women are not "just sitting at home all day" waiting for a project or government programme to come along and "involve them in development"' (Corner, 2002:7). It has also helped to move analysis away from a WID to a GAD approach insofar as it permits systematic comparisons between women's and men's lives and activities. Some of the now widely-accepted facts which the 24 hour day model has assisted in establishing are: 1) that women and men use time differently, 2) that women spend more time in work overall than men, but shorter hours in paid work, 3) that women have less 'discretionary' time, and 4) that women typically engage in multiple activities (childcare, housework, remunerative work, minding animals and so on), simultaneously (ibid.; see also Floro, 1995). These clearly echo a lot of the dimensions identified in respect of my proposed construct of a 'feminisation of responsibility and obligation'.

14. More generally, shortcomings of PPAs include the difficulty of verifying results and comparing them across national and international contexts, the fact that the process of participation itself is so dialogic and power-laden that the knowledges produced may be more a function of the exercise itself than a window onto people's opinions on, or responses to, privation, that informants' participation itself, and what they say, may be shaped by financial incentives, and that it is difficult (and costly) to recruit skilled communicators up to the task of genuine participatory assessment rather than the 'straightforward' application of a questionnaire (see, for example, Cook [ed.], 2002; Gibson-Graham, 2005). Another drawback is that PPAs is often a one-off exercise, regardless of the fact that '...getting underneath the political inflections of talk requires longer-term work that builds up relations with those we are seeking to understand' (Jackson, 2003:455). Adding up these factors, it is no surprise that PPAs are often regarded as an adjunct rather than a substitute for more conventional methods (UNFPA, 2002), especially given that participatory exercises are more usually symbolic than substantive (see Chant 2006a: Chapter 2).

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**SESSION 4:**

**RECONCILIATION POLICIES: SECTORAL PERSPECTIVES**

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## **SEXUAL AND REPRODUCTIVE RIGHTS AND CARE IN THE FRAMEWORK OF RECONCILIATION POLICIES**

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First of all, I want to thank the organizers for the opportunity to participate in this Seminar, which allows those of us active in the sphere of public policy to learn about world trends and research to achieve equity.

I also want to share the joy many of you have expressed regarding the hope for change in the Uruguayan government and the perspectives this administration opens up for the Latin American region as a whole.

To everybody's sorrow, I would also like to share, however, that we have found a country we did not know, where exclusion and education, health and economic hardships separate us from the ideal of being South America's Switzerland. Uruguay is one of the countries with the highest levels of external debt per inhabitant, illiteracy levels painfully recognized by our own Minister of Social Development, and a situation of social emergency.

However, the commitment of the current administration is defined by the achievement of social justice and gender equity under the guidelines of its government program and a decentralization, territoriality and social participation strategy to achieve citizens' rights.

It is in this framework that the program I lead was created to develop health policies aimed at providing comprehensive and non-discriminatory health care for women.

International solidarity and support from regional institutions are essential to that end.

1. Women's achievements in Uruguay occurred simultaneously with other global accomplishments resulting from the struggle of women suffragists; visionary and tenacious women that surmised the iniquity of women's citizenship and their place as second-class citizens. Other achievements were made in the framework of women's protection, and not precisely as a result of women's struggles. Instead, they were the result of an ideology advocating the citizens' rights of the French Revolution and the future of the nation. That is how we achieved the right to divorce in 1912, the Law on Women's Civil Rights in 1946, the Motherhood Protection Law in 1948 and several other laws, as part of the country's rule of democracy.
2. The process of military dictatorships in the continent took over our country from the 1970s to the mid 1980s, and successive governments coexisted with neo-liberalism and globalization, which led the region as a whole to successive and major economic crises and translated into the highest level of external debt per inhabitant in Latin America and huge challenges in terms of equity and justice. But we are convinced Uruguayan people and our government are doing the best they can to achieve them.

As far as the theme of this meeting is concerned, we also want to share that the persistent increase in women's economic participation and the importance of their income in overcoming poverty has made us one of the countries fighting that battle. University enrollment also expands that horizon, which means today we have women in all sectors working double or triple shifts to fulfill their professional, work and family roles.

In any event, the fact is that women with young children are the ones mainly joining the ranks of paid work.

And that is where we find injustices having to do with the rule of economic and political rights.

Paid work is made compatible with inequalities, salary gaps, low-quality jobs, limited social security protection, a higher incidence of poverty and the non-reconciliation of partner and family care tasks, as addressed on all levels in this Seminar.

**Overwork resulting from unpaid work**

Recent research conducted at the Republic’s University School of Social Science, led by Rosario Aguirre and published recently (Aguirre, Batthyány, 2005), has provided data on the total workload for the population of Montevideo. The total workload is the result of the total sum of hours dedicated to paid and unpaid work.

In average, males dedicate 28 hours to paid work and 3 hours to unpaid work, for a total workload of 41 hours a week. In the case of women, the ratio is the opposite: they dedicate 16 hours to paid work and 32 hours to unpaid work, for a total of 48 work hours a week.

If we consider general averages, we can see that, compared to men, women dedicate half the time to paid work and 2.5 times to unpaid work.

**Distribution of total workload  
(paid and unpaid) in average weekly hours**

	MEN		WOMEN		TOTAL	
	Hours	%	Hours	%	Hours	Women/ Men
Paid Work	28.4	68.5	15.6	33.0	21.4	0.5
Unpaid Work	13.0	31.5	32.0	67.0	23.0	2.5
Total Workload	41.4	100	47.6	100	44.4	-

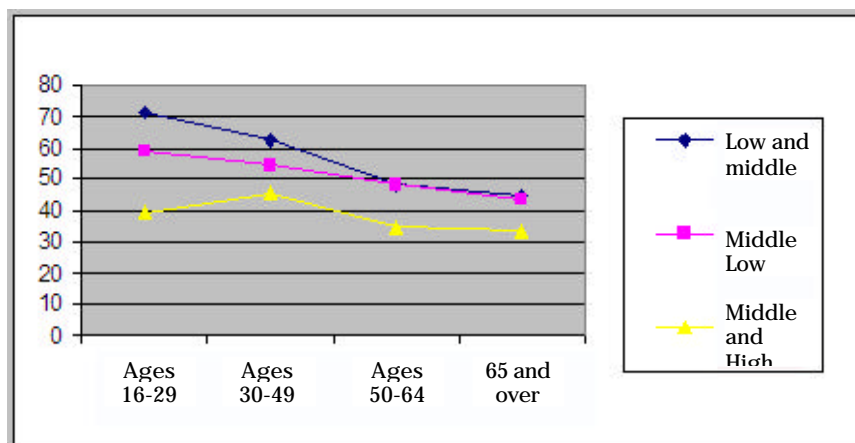
Source: Survey on Time Use and Unpaid Work. Montevideo, 2003.

Childcare and household work (typical household chores, home management tasks and dealing with utilities) are the most time-consuming activities in households in Montevideo, and also where the biggest gender imbalances are found.

Overwork has a bigger effect on young poor women.

From the above-mentioned research it follows that the amount of time dedicated to unpaid work by women responsible for households shows significant differences depending on the socioeconomic level. The amount of time dedicated is visibly higher in the case of low and middle-low socioeconomic levels. On this and the middle level, the largest proportion of time corresponds to younger women (ages 16 to 29). The research figures clearly show that young women on the lower socioeconomic level -those responsible for a larger number of small children- are the ones dedicating more time to unpaid work. On the highest level, the largest amount of time dedicated to unpaid activities is found among women in the second age segment -30 to 39-, which might have to do with the fact that motherhood takes place at a later time and also with the larger amount of time dedicated to raising tasks compared to other levels.

**Average weekly hours dedicated to unpaid work by the woman responsible for the household, by socioeconomic level and age group**



**Source:** Survey on Time Use and Unpaid Work. Montevideo, 2003.

The deficit of social services to support care for children, people with chronic illnesses and older adults. Limited state coverage and expansion of goods and services. Need for quality control of benefits.

The consequences of family responsibilities on the exercise of rights affect women's lives.

Sex at the workplace is expressed in the form of sexual abuse, as jobs are informal or the result of hiring with no social security. In the case of mothers, we find the desexualization of their own lives, in addition to living the exercise of their rights in an ambivalent fashion, with socialization and freedom from isolation fulfilling a mother role without the State or their partners' support. Women live life with multiple pressures leading to a fragile mental health and stress and depression situations.

Breastfeeding with no support from the family or networks, or not recognized in the work sphere, becomes another task that can not be experienced by women or their breast-fed infants as a stage of mutual affection and bonding. Thus, breastfeeding is lived as a period characterized by a heavier workload, ignorance and the abandonment of their most basic needs.

As far as their own health self-care is concerned, women explain their situation by referring to household problems and care for children, the sick and dependants.

In addition to these data, we can mention a recent national study on GENDER AND GENERATIONS conducted by UNFPA, Paraguay's Ministry of Health, UDELAR, the local PAHO Division, and MYSU as civil society.

Among other significant data, this study highlights two facts that are vital for purposes of analysis and in terms of the consequences for health and education policies: women from poor sectors with lower education levels start having sexual relations at an earlier age, and all Uruguayan women want to have 2 children in average.

The latter reflects the huge gap between social classes in the country, as only people from high or middle socioeconomic levels can fulfill that desire. Poor women are the ones who, without actually desiring it, have an average of more than 4 children and maintain national population figures. 47% of Uruguayan children are born below the poverty line, thus perpetuating the vicious circle of poverty.

## **Sectoral needs and analysis**

Although women were typically linked to reproductive roles and care for families and dependants, their entry into the labor world and that of productive roles increases their task, which in some cases borders on the limits of human rights.

The responsibility of creating, raising, educating and conveying the values of future citizens falls on women, particularly the poor ones.

It is clear that States have failed to consider this form of labor represented, from a cultural standpoint, by the free contribution made by women.

However, achievements made in the past, women's entry into the productive world, their political participation, their contributions to social life and their contribution to care and the dynamics of social groups and communities are significant and must be recognized.

It is essential to incorporate the changes and solutions that have been produced and continue to be produced in the field of sexual and reproductive health.

The appearance of modern contraceptive methods led to changes in life and sexual habits, as well as links and bonds between individuals and societies.

Although the concept of sexual and reproductive health, where people were the object of health and education policies, was defined by PAHO a long time ago, the interpretation applicable to such policies focused on the mother-child binomial and maternal and child care. In this concept, both characters were linked by the reproductive process with no possible individuation.

One of the paradigmatic changes that took place in the process of the UN Conferences of the 1990s, where the pulse of the world and institutional and social stakeholders was taken, was the shift from sexual and reproductive health to the field of human rights; to the SEXUAL AND REPRODUCTIVE RIGHTS of the Cairo and Beijing Conferences our country subscribed to with no reservations.

Thus, both men and women are entitled to these rights.

This means we are dealing with their enforcement and a declaration on population policies that the country, Uruguay in this case, proposes and admits as a state policy to follow.

It is another citizens' right for social inclusion.

Therefore, it is not the State's obligation to fulfill this task, to review the cultural obligation exclusively assigned to care, to women's invisible and unaccounted work. Women represent compulsory family and social reproduction, care for their offspring and dependants, breastfeeding, health care for everyone and the community, and the productive contribution to the livelihood of families, whether they are heads of households or not.

A further consideration of the figures provided for this analysis and this Seminar shows it would seem clear that sexual and reproductive rights are a contribution to reconciliation policies.

It is impossible to think that, without the right to have the number of children women want, desire, expect and make a commitment to raise, no care reconciliation policy can be achieved.



In order to achieve these rights, education at all levels, access to integral health services and the incorporation of all the wide range of modern contraceptive methods are required to preserve the individual and non-transferable nature of these rights.

Thus, men and women must be educated to fulfill their sexual and reproductive responsibilities throughout the different stages of their lives. That education must be reconciled with fair, reliable, affordable and non-discriminatory health services.

Therefore, in order to achieve family, couple and social care, women's decisions in the sphere of reproduction must be reconciled.

As far as raising their offspring is concerned, social policies and the State must also assign personnel and resources for women, if they understand it that way, to be able to contribute to the productive, professional and public world so their ideas, point of view, experiences and knowledge can enrich society and culture.

### **We face challenges ...**

- 1) Care as the social, sexual and reproductive responsibility of couples, families, and particularly disadvantaged populations.
- 2) The State's obligation to ensure women's decisions and, at the same time, the availability of comprehensive support for the development of the number of children families desire.
- 3) Reconcile and coordinate modern, appropriate and personal contraception services, facilitating ways of life and legitimate, cultural and ethnic decisions.
- 4) The accomplishment of a decentralized, territorial and participatory care model
- 5) The integration of the gender perspective into the spheres of Ministries and their programs.

On the other hand, women's role in the community and their role as health promoters and caregivers must be reassessed.

Although women provide care for their neighbors and families, dependants and the sick, and have the capacity to provide health education to their children and care for adolescents, all this as a result of the introjection of their traditional care roles, this role must find a limit.

Voluntary work has limits, particularly in communities on the verge of survival.

It is for this reason that women's participatory and community development work must contain the germ of their own empowerment and citizens' control.

It is based on this group process that they will get ready to demand their rights, contribute their knowledge and live with equity and justice.

*...When I was taught mankind had to burst into flames to understand the value of fire ...I understood that the fire of gender inclusion we have lived must generate big and small fire sources in societies, institutions and culture to open up new opportunities for equity so that, without fear, we can embrace the diversity of new generations.*



## UNPAID CARE WORK AND SOCIAL PROTECTION SYSTEMS IN LATIN AMERICA

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The population in Latin America is aging, although the effects of this phenomenon have not yet been perceived in many countries, because they are experiencing a demographic bonus resulting from a recent past of high fertility. However, the demographic transition is in progress and there appear to be no mechanisms to address the population's new age structure, which entails not only a different profile of dependants, but also new health needs.

Employment is a commodity in short supply, and typical and indefinite employment contracts are becoming the exception, not the rule. Informal work in labor markets is becoming massive and it is also being feminized outside social welfare systems.

These processes are experienced in a context of poverty and increasing social and gender inequalities that demand urgent universal, solidary, efficient and sustainable responses from social welfare systems.

Given the importance of these systems, they will be addressed during ECLAC's next period of sessions to be held in March 2006 in Montevideo. Therefore, and also due to the fact that Women's Offices are making a permanent effort to join the mainstream of social problems and political decisions, the recent 38<sup>th</sup> meeting of the Presiding Officers of the Regional Conference on Women in Latin America and the Caribbean also addressed the subject.

ECLAC considers social security systems, unemployment insurance, poverty relief programs and pension systems as components of social protection.

This article will address the latter two components in their relationship to unpaid care work, considering ECLAC's Women and Development Unit has a large number of studies providing empirical evidence and new conceptual approaches to gender inequalities in these areas of social protection.

### **I. Why consider unpaid care work in social protection?**

There is one first evident link between care and social protection systems, inasmuch as these are a form of indirect care. However, for women, who account for more than one half of the population, the connection is much more complex and has negative consequences for the exercise of a series of rights.

Women's relationship with social security systems initially, and protection systems at present, has been influenced by the caregiver role that continues to be assigned to them. In different moments in history, societal systems have distributed the responsibilities of caring for children, the elder and the sick among the state, the market, civil society and families, although these have always absorbed a significant portion of this work. And, evidently, women are the ones responsible for these tasks within households. A large proportion of these tasks are also carried out via volunteer work, civil society organizations and, through paid work, by the State (Giménez, 2003).

It is precisely due to their role as caregivers that women's access to social rights in general, and social welfare benefits in particular, has been recognized, thus determining their dual relationship with care: they earned the right to care precisely because they are the ones in charge of providing it. This relationship persists in spite of structural reforms in the field of social welfare, and it also penetrated poverty relief programs implemented in several countries in the region as of the late 1990s.

Unpaid social care work done by women is subsidizing social protection systems. Women fulfill what should be a social responsibility and, therefore, a matter of social security coverage. And this is where we find another facet of the particular relationship between women and social protection, considering their role as caregivers is affecting their social security situation. In effect, the assignment of childrearing, care and household tasks almost exclusive to women determines their condition in the labor market, which, in turn, defines their social security situation.

Women distribute their time under the emphatic division between the public and the private spheres. Women in these two spheres must reconcile. Therefore, it is not a matter of choice. Women's obligation to choose, to abdicate in one of these spheres, restricts their freedom in a context where motherhood continues not to be conceived as a social responsibility, despite the provisions of international conventions in this field (Marco and Rico, 2005).

It is necessary to open the debate on a topic that, until recently, seemed clear and unquestionable: men to production and women to reproduction. The model evolved into a crisis. However, policies are still designed, to a large extent, for nuclear patriarchal families with provider fathers and mothers working part-time or in the household (Olavaria and Céspedes, 2002)

Legal provisions and programs allowing women and men to reconcile family responsibilities, household work and paid work are scarce; they are limited to a specific target population (care for the children of female heads of household, poor women) and, in general, they are targeted at female workers, under the assumption that they are the ones who must reconcile, because they are responsible for household work and childcare. Measures adopted refer to the obligation of companies to provide daycare facilities –in almost all cases depending on the number of women employed, with the exception of Ecuador and Paraguay- and also to childcare centers or programs. Something even less frequent are leaves to care for sick children (only available in Chile and Cuba, in addition to the leave for “domestic accident” for government employees in Ecuador, and the leave for sickness of children or other individuals under their care or custody also for government employees in Puerto Rico). Equally scarce are childbirth leaves for male workers (only available in Argentina, Brazil, Chile and Colombia, while in Uruguay and Puerto Rico they are only intended for government employees). The childcare leave system is only found in one country (Argentina) and it is exclusively aimed at female workers (Marco and Rico, 2005).<sup>1</sup>

As can be seen, care and childrearing are far from being considered social responsibilities, as only a small proportion of this responsibility is absorbed by companies and States. The few achievements made are aimed at assisting women in reconciling their work and family lives.

### **But do women want to reconcile?**

What we want is a different organization of the labor market, work within the family and public services. We don't want to have to reconcile; we don't want to be the space for adjustment of two opposite spheres. We no longer want them to be opposites.

### **Poverty relief programs**

Several countries in the region are currently operating poverty relief programs. These include *Bolsa Familia* and *Hambre Cero* in Brazil; *Bono de Desarrollo Humano* in Ecuador;

*Jefes y Jefas de Hogar* in Argentina; *Oportunidades* in México and *Chile Solidario* in Chile (Serrano, 2005)

It is not the purpose of this paragraph to describe these programs, let alone evaluating them. Rather, the idea is to present some common elements explaining the persistence of a gender system including public policies that, in this case, far from encouraging the redistribution of care responsibilities, reinforce their assignment to women.

We are talking about focalized money-transfer programs with broad coverage. Seven million beneficiary families in Brazil and five in Mexico. They have a coverage never seen before in government programs in the region.

Results have been positive in terms of access to services, basically health and education ones, something achieved via subsidies to the demand, because these do not have an effect on the offer of these services (Serrano, 2005). While improving the quality of health and education is not the purpose of poverty relief programs –this being a reason why it would be inappropriate to demand something from them in this regard– we could think about the positive impacts of their coordination with sector and local policies.

In practice, these programs have only served as a palliative for the deficiencies of other components in the social protection system. It is precisely due to the success in this endeavor and the relatively limited budgetary commitments they have involved, that the argument has been raised that it would be more efficient to invest in these programs as opposed to social security systems, without even considering the possibility of reforming the latter. The danger of these proposals lies on the fact that they advocate substitution rather than complementarity<sup>1</sup>.

Along the same lines we can see that the objectives of social security have been subsumed into the possibilities of funding, this being the main argument to prevent changes in reforms already implemented, which contrasts with the funding available for such reforms at some point in time, although at an excessively high cost, but not for benefits. From there the emergence of a central question on the future of politics and social protection in the region: Is it possible to implement an internal political dynamic where decisions regarding social public expenditure emerge from democratic political processes where the final assessment of the State's role in this field is directly dependent on the needs and preferences of citizens? (Pautassi, 2005:10 -11)

#### **a) Care as women's form of access**

The benefits of poverty relief programs are linked to the fulfillment of a series of requirements, which are designed to benefit the target family, particularly children. Thus, we are talking about conditioned transfers.

The recipients are women, either due to an express provision or because that is the way the program has been implemented in practice. Women are also the ones who must meet the requirements of participating in vaccination campaigns, health and nutrition workshops, and ensuring their children's access and attendance to school.

As can be seen, all the different conditions are related to family well-being, and women appear as the only ones responsible for it. That is why they are the recipients.

In many cases, the receipt of transfers by women has meant more control over the family economy and more spaces for interaction available to them particularly resulting from the process of collecting the benefit. In this regard, we can speak about the programs' unplanned female empowerment, which appears as a *positive externality* thereof. But receiving the benefit and the requirements linked to it have also involved an overload in terms of their time, while still relying on the sexual division of labor and strengthening the image of women as "beings to the service of others" (Serrano, 2005)

## **b) Some suggestions for care redistribution**

We could consider that the fact that women are the recipients is an element of recognition, a compensation for their unpaid care work. However, an analysis of the different programs suggests otherwise. In some cases it is clear that the collection of these benefits by women does not involve an element of recognition, but one of organization, considering women would be better at administering resources and would put them to better use compared to men. But even under the best of assumptions, i.e. that this transfer is an element of recognition, why not also point to the redistribution of care?

The incorporation of gender mainstreaming into public policy is the result of highly complex and variable processes that are developed in different ways depending on the stakeholders involved (Rico, 2000:200). This complexity goes hand in hand with extended periods and, on many occasions, long-term results. However, it is possible to adopt simple measures not affecting the structure or the intentionality of poverty relief programs that could have positive impacts on the mid-term redistribution of care. In this regard, one possibility would be that of modifying the conditionality of benefits in order to demand from males their participation in vaccination campaigns, health controls for children, nutrition workshops and school meetings.

Measures like the ones mentioned above would not only mean more free time for women; they would also send a message on male responsibility in family well-being and, thus, they would also represent a contribution in symbolic terms.

### **Pension systems**

By the late 1990's, after an evaluation of that decade, the need was confirmed for policies and programs bearing in mind the specific situation of older adult women, including the particular metabolic-degenerative problems of their biological constitution, the psychological problems resulting from the lack of social recognition, and the fact that the incidence of poverty and headship was higher among older women, something also applicable to their dependence situation (Rico, 2000:185)

The need for policies like the ones already mentioned is still there and becomes even more evident as a result of the increasing problems involved in the coverage and sufficiency of benefits in pension systems, as well as the inequalities between men and women resulting from structural reforms implemented in this component of social protection in several Latin American countries.<sup>1</sup>

Studies show that pension reforms: reproduce differences in the labor market; incorporate pension calculation formulas involving a clear discrimination against women, which in several countries becomes worst with their lower age of retirement; and exclude those doing reproductive work; in other words, approximately 60% of women, those conventionally considered *inactive*, do not have access to pensions or rely on receiving a social security or widow's pension in those countries where it is available. Therefore, women receive smaller pensions compared to men, and even though they account for the majority of the old-age population, they are underrepresented among pension recipients (Marco, 2004)

### **a) Care as a form of access and an obstacle for women**

Pension reforms were designed for a given citizen's profile: the male urban worker depending on the formal sector of economy, with an indefinite contract and sufficient and regular income allowing for continuity in the payment of social security fees. In many cases, women appear as dependants, burdens or beneficiaries of male workers. Precisely for being caregivers, like in previous individual capitalization systems, and despite the change in paradigms involved in those reforms, the relationship between women and social protection is still influenced by care, which continues to be unrecognized and non-

redistributed. From there the persistence of the notion of women's subordinate social citizenship.

For those women accessing the pension system "in their own right", that is, because they are paid workers, problems do not disappear. First, because they are not exempted from the care, childrearing and household work that continues to determine their work situation. As is known, female workers are overrepresented in those occupational categories with fewer opportunities of access to the social security system, such as domestic work, unpaid relatives and self-employed women. But we also have the salary discrimination that determines the amount of their pensions and the use of mortality tables differentiated by sex that, even with similar salaries, will result in lower benefits.

The above-mentioned gender differences can be clearly found in social security legislation, but they appear as a fact of reality that we can not and do not intend to change. Therefore, the sexual division of labor leading to women's overload of family responsibilities, the effects of this division on their entry into the labor market, the salary discrimination they are subjected to, and even their higher life expectancy, appear as increased or reproduced vulnerability traits that we do not intend to correct (Montaño, 2004:19)

#### **b) Some suggestions for the recognition of care work**

Proposals "to reform reforms" are varied and range from systemic ones –which involve a change of logic in individual capitalization to adopt forms that are solidary in essence– to specific proposals that can be adopted while maintaining the structure of current systems to make up for some of the inequalities they generate. Here we will only deal with those related to the recognition of unpaid care work.

Positive action measures should be adopted for women in the labor market. In this regard, one possibility would be that of establishing a smaller number of fees, like in Costa Rica's early retirement system, or fewer years in the system, like in Brazil's system for retirement after a certain time of paying fees. Initiatives like these represent a differentiated treatment partially making up for the inequalities of the starting point, but they are also a recognition of care work.

For those outside the labor market and engaged in care, childrearing and household work, the option of specific non-contributory benefits, the so-called housewife pension, is available. The non-contributory nature is specified, because alternatives such as fees paid by the husband or partner establish a new form of dependence. Funding for these pensions relies on the corresponding social security system. Under the individual capitalization mode, where the principle of equivalence prevails and each individual receives a benefit consistent with his/her contribution and no cross-transfers exist, these pensions would have to be marginal to the system and funded via taxes.

There is also the proposal for universal pensions discussed as part of the debate around citizen's income, which are called universal to incorporate migrants (Paganini, 2002). If every old person is entitled to a pension, those doing unpaid work and meeting a big social need are also covered.

The ways of implementing a universal pension can vary: public administration and funding via taxes in general, or a combination of public and private funding with differentiated fees depending on the area of residence, income group and occupational category, among other criteria, subject to change depending on the permanence of individuals in the corresponding group (Paganini, 2002; Pautassi, 2005).

Another proposal is that of integrating income accumulated in the pension fund to the joint property structure, so that, in case of divorce or dissolution of the de facto union, funds accumulated by both spouses are considered joint property and, therefore, are susceptible of being divided into equal parts upon divorce and splitting, after which individual contribution funds for each party would be reconstituted. In this case, we are talking about a

reform of civil or family legislation depending on the country. Compatibility between the widow's pension and an individual's own pension up to a certain income level could also be established, so that there is full compatibility, and after a certain amount, a partial compatibility of, for example, 60% of the widow's pension (Pautassi, 2005)

These measures would be targeted at all adult women, whether in the labor market or not, considering that, through their reproductive work, all of them contribute to their partner's assets and also to facilitate their entry into the labor market.

Finally, we should highlight other good practices, such as the recognition of the social and economic value of reproductive work at a constitutional level in Ecuador and Venezuela, and a recent constitutional amendment in Brazil, the implementation of which is being discussed in Congress. This amendment establishes that those individuals who are engaged in unpaid household work and are below the poverty line are entitled to social security benefits. The measure already had a history, because since the 1988 Federal Constitution, people working in rural areas have a minimum guaranteed pension, precisely considering the contribution of their work to the country's economic and social development, which not always translates into sufficient income or salaries.

### **By way of closing**

The almost exclusive assignment of unpaid care work to women continues to be one of the reasons for labor discrimination, and even though feminists and several international agreements have been demanding shared responsibilities for some time, very little has been done in this regard. Rules and incentives are required to make men and women's rights and obligations in this field equal and to facilitate care for children and the elder by workers of both sexes.

It is true that not all the responsibility can be assigned to social protection and also that, in the sphere of the labor market, great efforts must be made to improve the situation of women. But it is no less true that social protection systems and the different stakeholders involved can and must correct discriminations. It is necessary to tackle the starting point and, to that end, family, training and education policies are really important. However, it is essential for social protection policies to incorporate a positive action dimension correcting the discriminatory effects visible in women's differentiated access and situation in these systems (Montaño, 2004:27)

In order to look into the future of social protection and to evaluate initiatives to improve it, a key element is the distinction between compensatory policies and those helping build and strengthen citizenship. In the case of women, strengthening their full citizenship necessarily involves recognizing the social and economic value of reproductive work, which includes care work and its redistribution. This, in turn, involves effectively conceiving this work as a social responsibility, which as such must be undertaken not only by men and women, but also by social protection systems.

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## RECONCILIATION, PUBLIC BUDGETS AND REPRODUCTIVE HEALTH: THE CASE OF MATERNAL MORTALITY

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### What is maternal mortality?

Maternal mortality: definition

Maternal mortality is “the death of a woman during pregnancy or childbirth, or within 42 days of its termination, from any cause related to or aggravated by the pregnancy or its management but not from accidental or incidental causes”. (WHO).

### Maternal mortality: Why is it a political problem?

In synthesis, it is a political problem because it is directly linked to various rights and perceptions of these.

From the standpoint of public policy, rights involve specific actions and strategies leading to the expansion of women’s freedom in terms of self-determination regarding their bodies. But not only that; they also denote a series of circumstances that ultimately make the difference between a woman dying or not, such as the deficiencies and limitations of the public health system in providing timely and efficient care for women during pregnancy, childbirth and the puerperium. Also, the death of women for maternity-related causes involves racist and negligent practices in the system and its members, as well as the medical incompetence of health personnel upon dealing with normal situations and obstetric emergencies.

There are also other variables that contribute to the prevalence of this problem, such as women’s actual access to timely transportation, financial access to medical care, and cultural access, for example, where medical personnel do not speak the language of the woman in labor, no translators exist at the health facility or medical practices transgress women’s customs; or a woman’s financial incapacity to get lodging –generally with their children or the person accompanying them- while waiting to receive medical care.

Evidently, all of the above gives an idea of the public policy on budgetary allocation (financial resources); whether it is coherent or not with its categorization as a public health priority issue.

Women who die are poor and live in sectors with high and very high levels of marginalization, in rural or urban-marginal areas, and have problems with geographical access to health centers.

In summary, we can conclude that maternal mortality is a political problem because:

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<sup>75</sup> Head of the project *Mortalidad materna y presupuesto público: seguimiento al programa Arranque Parejo en la Vida* (“Maternal mortality and public budgeting: follow-up on the program “Arranque Parejo en la Vida”) of FUNDAR, Centro de Análisis e Investigación A.C. with support from the John D. and Catherine T. MacArthur Foundation. Documents available on [www.fundar.org.mx](http://www.fundar.org.mx) The project has the following field researchers: Graciela Freyermuth in Chiapas; David Meléndez in Guerrero, and Martha Castañeda in Oaxaca; as well as external consultants Hilda Reyes and Carlos Neri, both physicians from the National Perinatology Institute. UNFPA/GTZ International Experts Meeting, SOCIAL COHESION, RECONCILIATION POLICIES AND PUBLIC BUDGETING: A gender approach. Mexico City, October 24-26, 2005. [genero@fundar.org.mx](mailto:genero@fundar.org.mx) [www.fundar.org.mx](http://www.fundar.org.mx)

- it has to do with women's sexual and reproductive rights,
- political, economic and social rights,
- the budgetary allocation criteria to fight it,
- rights deriving from "customs and practice",
- it causes tension between traditional and western medicine, and
- it is directly linked to the right to abortion.

Maternal mortality is internationally recognized as a development indicator. At present, it is also recognized as one of exclusion in health.<sup>76</sup>

Its decline has been repeatedly included as a goal in several international conferences and their corresponding accords and programs of action.

The last conference to subscribe a specific reduction goal was the Millennium Development Summit in 2000, which established the following:

*MDG 5: Improve Maternal Health.*

*Target 6. Reduce by three quarters, between 1990 and 2015, the maternal mortality rate.*<sup>77</sup>

The indicators established to measure performance in connection with this goal are the maternal mortality rate, on one hand, and the percentage of deliveries with assistance from specialized health personnel, on the other.<sup>78</sup>

### **Maternal mortality in Mexico**

Maternal mortality is concentrated in the poorest states in the country with the highest levels of indigenous population and the biggest gaps in terms of public health services.

*Mexican states with the highest maternal mortality rates in Mexico, 2004:*

- Chiapas: 103.2 (per 100,000 reported or estimated live births)
- Guerrero: 99.8 (per 100,000 reported or estimated live births)
- Oaxaca: 86.9 (per 100,000 reported or estimated live births)<sup>79</sup>

The population sector where maternal mortality is concentrated in Mexico is that of poor or extremely poor indigenous women with no social security living in rural areas.

*Main causes of maternal mortality in Mexico, as of 2004:*

- Preeclampsia-eclampsia: 366
- Hemorrhage: 317
- Puerperal sepsis: 43
- Abortion: 88
- Other complications of pregnancy, childbirth and the puerperium: 219

<sup>76</sup> The Pan American Health Organization (PAHO) proposes the reorientation of health towards the primary care level. This proposal is based on the right to health, solidarity and equity. To provide it with a basis, PAHO resorts to the concept of *exclusion in health*, which is defined as "the situation where an individual or group of individuals cannot access the mechanisms allowing them to meet their health needs". Thus, exclusion in health is understood as the lack of access by certain groups or people to goods, services, and opportunities that improve or preserve health status and that other individuals and groups of society enjoy". *Exclusión en salud en países de América Latina y el Caribe*, Serie Extensión de la Protección Social en Salud, N° 1. Edición revisada. Oficina de Gerencia de Programas, Unidad de Políticas y Sistemas de Salud, Área de Desarrollo Estratégico de la Salud, Organización Panamericana de la Salud, 2004: 6.

<sup>77</sup> United Nations Population Fund (UNFPA), *Población, Salud Reproductiva y Objetivos de Desarrollo del Milenio. Cómo el Programa de Acción del CIPD promueve los derechos humanos y la mitigación de la pobreza*, p. 7.

<sup>78</sup> [www.undp.org/spanish/mdgsp/mdgtablesp.pdf](http://www.undp.org/spanish/mdgsp/mdgtablesp.pdf)

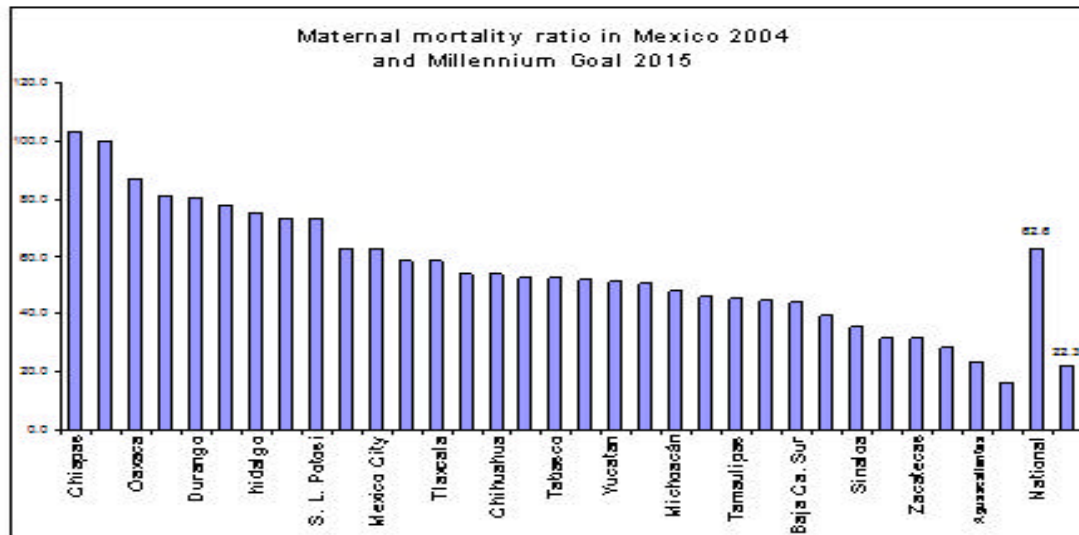
<sup>79</sup> Maternal mortality ratio per 100,000 estimated live births (Secretaría de Salud, *Salud, México 2004: Información para la rendición de cuentas*, p. 201 [www.salud.gob.mx](http://www.salud.gob.mx))

Total deaths: 1 242.<sup>80</sup>

It is worth highlighting that these complications are mainly associated with childbirth; they are also completely treatable through timely and efficient care.

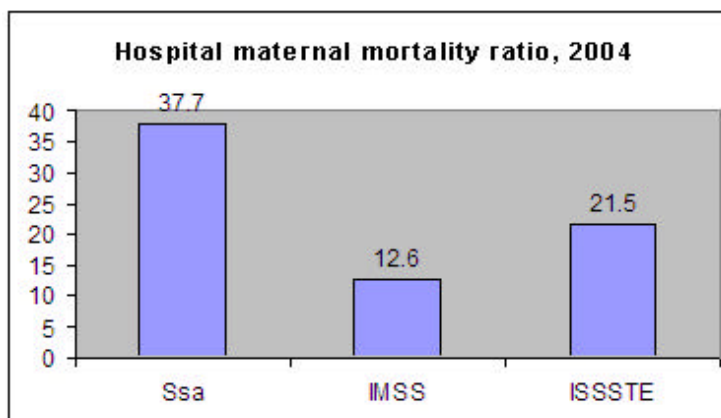
Mexican figures regarding the Millennium Development Goal for 2015.

- Maternal mortality ratio in 1990: 89.0 (per 100,000 estimated or reported live births)
- Maternal mortality ratio in 2004: 62.6 (per 100,000 estimated or reported live births)
- Target number for 2015: 417 maternal deaths.<sup>81</sup>



**Source:** Prepared by the author with data from SSA, *Salud: México 2004. Información para la rendición de cuentas*, 2005, [www.salud.gob.mx](http://www.salud.gob.mx) For the Millennium Goal, Centro Nacional de Equidad y Género y Salud Reproductiva.

The figure is overwhelming. Deaths in hospital facilities are concentrated in the Ministry of Health’s hospitals; there is a clear and urgent need to improve them, considering women outside the public health security systems are the most vulnerable in case of an obstetric emergency.



Source: SSA, *Salud, México 2004: Información para la rendición de cuentas*, p. 220 [www.salud.gob.mx](http://www.salud.gob.mx)

<sup>80</sup> Source: Secretaría de Salud, Centro Nacional de Equidad y Género y Salud Reproductiva.

<sup>81</sup> Ibid.

### Why is maternal mortality not solved if diagnoses and proposals exist?

To answer this question we need to address the history, at least the recent history, of the strategies implemented to address this problem. The design of strategies and actions established in the health policy to provide care during pregnancy, childbirth and the puerperium, targeted at the uninsured population (that is, with no access to the social security system), is based on health promotion which, in turn, is based on self-care and prevention vs. cure. This translated into a Health Services Basic Package (PBSS), where care during the gestational period and the period following it was incorporated –in the Mexican case- as one of 13 other interventions.

Following this cost-benefit logic, the Coverage Expansion Program (PAC) was implemented to reach out to a large sector of the population –preferably poor people- with basic health actions. The program lasted from 1996 to 2002, with funding from the World Bank. The rationale behind it was that of generating high social impact with low budgetary expenditure, as the primary objective is that of reducing the health gap in the most marginalized areas in the country.

Now well, the idea of incorporating into a strategy of the Health Services Basic Package the intervention *Prenatal Care during childbirth and puerperium and care for the newborn*, the objective of which was also to *reduce maternal and child mortality in the perinatal period*<sup>82</sup>, was doomed not to fulfill that objective. One of the many reasons was that, for women and their families, access to medical care continued to represent an expense impossible to cover, or doing it meant getting in debt.

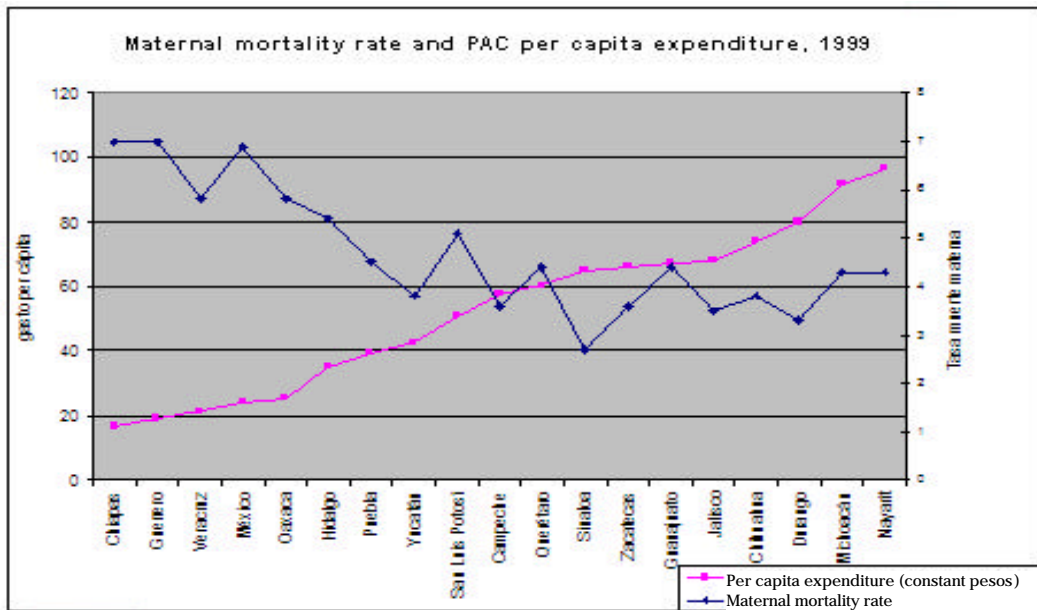
Fieldwork done by anthropologist Martha Castañeda in the state of Oaxaca categorically showed the situation of the State's saving transferred to the patient. Only two examples:

- As of 2001, recovery fees paid by poor women accounted for more than one fifth of the PAC budget for Oaxaca.
- The amount spent in transportation and lodging by women and their poor families was equivalent to 61% of the PAC for 2001 in Oaxaca.

Another key aspect –not only in the case of PAC- is the analysis of budgetary allocations linked to maternal mortality rates in the states where the program operated (the 19 states, out of 32 in the country, with the biggest health coverage gaps). In the research conducted by Fundar, per capita expenditure was cross-referenced with maternal mortality rates. The result was that the states with the lowest per capita expenditure were precisely those with the highest maternal mortality rates.

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<sup>82</sup> *Diario Oficial de la Federación*, “Reglas de Operación del PAC”, Mexico, March 2001.



Source: Prepared by the author with data from the Social Development and Equity Bureau and the Ministry of Finance, Public Treasury Account.

Failure to achieve reduction goals and the change of government led to the Ministry of Health’s decision to design and implement a program to specifically address maternal and child mortality, the program *Arranque Parejo en la Vida* (APV).

APV did not involve an increase in budgetary allocations or earmarked expenditure, particularly for care during pregnancy, childbirth and the puerperium, with specific strategies to address death by maternity-related causes, or transparency in budgetary documents at the federal and state levels.

The program, on the contrary, continues to operate with existing resources and, to a large extent, its innovative aspects have to do with community contributions or support, something ridiculous if its actions are focalized in high and very high-marginality areas, which is what actually happens. In other words, key aspects already mentioned, such as transportation, lodging and translation, remain uncovered. The two former are at the mayor or the community’s will, and the latter is not even considered.

**Review of the capacity of *Arranque Parejo en la Vida* to provide Emergency Obstetric Care.**

The program was reviewed in view of the disappearance of expenditure allocated to APV in budgetary documents (it was initially published as a total and then by state, but without disaggregating funding between women and infants), and also due to its incapacity to provide an effective solution to obstetric emergency situations and sustain the paradigm of follow-up on high risk pregnancies and qualified care during childbirth, despite the fact that the main events where women die continued and still continue to be emergencies taking place mainly during deliveries.

In general terms, based on observations of field work in Chiapas, Guerrero and Oaxaca, the following was found in connection with *Arranque Parejo en la Vida*:

- Mexican Official Standard NOM-007-SSA2-1993 and the objectives of the program *Arranque Parejo en la Vida* are not met.

- The estimated number of health personnel and material resources (for example, beds) exceed actual figures.
- It continues to rely on the Health Services Basic Package.
- It is based on a *network of services operating via the management of financial and material resources external to agencies in the health sector* (SSA, APV 2002:40).

Finally, a follow-up on PAC and APV, both on a federal level and in the states of Chiapas and Guerrero, shows that the neglect of the first level of care, or at least its incapacity to provide care for obstetric emergencies, is overwhelming. This also applies to its impossibility to stabilize women in an emergency so they can have more survival time until they can get to a second level of care. Moreover, fieldwork shows that often times there is incapacity to deal with regular childbirths. By way of conclusion, implementing APV has not entailed the strengthening of the first level (health center), this being the first place where the woman in labor should go to for childbirth; this has led to its underutilization and a saturation on the second level (general hospitals and rural hospitals, among other categories).

As a result of all of the above, the decision was made to address a new paradigm, that of Emergency Obstetric Care (EOC).

The approach of following up on high-risk pregnancy and professional care during childbirth is advocated by WHO and *Family Care International*. In Mexico it can be found in the Mexican Official Standard (*NOM-007-SSA2-1993*) for care during pregnancy, childbirth and the puerperium and, as already explained, in the program *Arranque Parejo en la Vida*.

On the other hand, Emergency Obstetric Care (EOC) is proposed by the United Nations Population Fund, UNFPA, and Columbia University.

EOC has two basic guidelines:

- (1) providing care for obstetric emergencies, and
- (2) AMDD (averting maternal death and disability).

EOC highlights the fact that there is evidence that approximately 15% of pregnancies have complications leading to obstetric emergencies that, if not properly taken care of, lead to a woman's death.

### **Functions of Emergency Obstetric Care**

1. Administration of parenteral antibiotics.
  2. Administration of parenteral oxytocic drugs.
  3. Administration of parenteral anticonvulsants.
  4. Performance of manual removal of the placenta.
  5. Performance of removal of other retained products.
  6. Performance of assisted vaginal deliveries.
  7. Performance of surgery.
  8. Performance of blood transfusions.
- Functions 1 through 6 are feasible on the first level of care.
  - Functions 7 and 8 have to do with the second level of care.

### **Emergency Obstetric Care**

The EOC proposal (AMDD) in Mexico is a combination of the two above-mentioned paradigms. Thus, it incorporates elements of follow-up on high-risk pregnancy and qualified care during childbirth; however, its main actions are not based on them.



- Modification of the logical framework: the risk approach is reevaluated and the idea is suggested that complications during maternity are difficult to predict, but likely to be treated.
  1. Emergency obstetric care 24 hours a day, on the first and second levels of care.
  2. Timely care and referral to comprehensive emergency services with problem-solving capacity.

To this end, the following is necessary:

- 2.1. On the first level (health center): personnel trained to refer patients and stabilizing drugs
- 2.2. On the second level (hospital): a surgeon or gynecologist, and anesthesiologist and a blood bank.
3. To promote the use of medical services by women.
4. In prenatal care, to teach the pregnant woman and the person accompanying her how to identify alarm signs.

*Funding for drugs for Emergency Obstetric Care (Dr. Hilda Reyes and Dr. Carlos Neri, both from the National Perinatology Institute).*

In order to design the proposal to adopt EOC in Mexico, the decision was made to bring two external consultants to work on the costing of the different drugs to be used on the first level of care (health centers)<sup>83</sup> for the five main causes of maternal mortality in Mexico: preeclampsia-eclampsia; pre and post-delivery uterine bleeding (hemorrhage) in over 20 weeks' gestation; puerperal infection; obstructed labor and abortion.

The calculation was later made for the national total, as well as the states of Chiapas, Guerrero and Oaxaca.

One of the most significant results is the really low cost for public expenditure to supply drugs that, more than training of health personnel, make the difference between a woman dying or not.

*Research in Chiapas (Dr. Graciela Freyermuth, Ciesas-Sureste) <sup>84</sup>*

Figures speak for themselves. The resources required to supply drugs that ultimately save lives are really modest.

- Chiapas: complications have an annual cost between 3 and 9 million pesos (between the lowest and highest estimate).
- In the region of Los Altos (the one with the highest maternal mortality rates in the state) the annual cost is between 400,000 and 1 million pesos (between the lowest and highest estimates).
- Abortion: a larger number of complications (over 50%). Between 60 and 70 % of their cost. Abortion care is provided by hospitals.
- Abortion: care can be provided on the first level via Manual Vacuum Aspiration (MVA).

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<sup>83</sup> Results available on [www.fundar.org](http://www.fundar.org)

<sup>84</sup> Sources: Uninsured population health information system (SISPA); records of reasons for request of emergency care for obstetric conditions from 1998 to 2003 in the San Cristóbal Regional hospital (5,000), and specialized books: Williams Obstetrics and book from *Asociación de Médicos del Hospital de Gineco-obstetricia N° 3 del IMSS, A.C.*

### **Difficulties in the project research**

1. Invisibility of expenditure allocated to maternal care, particularly in the case of care expenditure separately earmarked for regular and complicated pregnancy, childbirth and puerperium.
2. Lack of information on estimates of morbidity in obstetric emergencies.

### **Conclusions**

- One of the priorities is the creation of a program to eradicate maternal mortality with financial resources and specific operational strategies to achieve that objective, understanding that, if it operates in extremely poor locations, it can not be heavily funded via community resources.
- If budgetary allocation is limited for the particular care of maternal mortality its eradication is difficult.
- Poor women from marginalized areas –whether rural or urban- with limited or inadequate medical services, many of them non-Spanish speakers, will continue to be the victims of preventable deaths. And their social status will continue to affect their opportunities to demand their right to health.
- EOC drugs do not involve significant budget increases.
- Costing must not only consider medical expenditure, but that related to health.
- Costing is a tool to promote new maternal health care paradigms and strategies.
- The budgetary analysis reflects a social policy maintaining health gaps.
- Visibility and accountability in expenditure allocated to maternal care are a pending and urgent matter.
- In order to calculate the maternal care budget it is essential to consider the costs of obstetric emergencies.

**SECTION 5:**

**GENDER, RECONCILIATION POLICIES  
AND PUBLIC BUDGETING**

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## **GENDER, RECONCILIATION POLICIES AND PUBLIC BUDGETING: AN APPROACH TO LATIN AMERICA AND THE CARIBBEAN**

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**JULIANA MARTÍNEZ**  
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### **1.- Introduction, questions and objectives**

Over the course of the last few decades, Latin American women have massively entered the labor market, which does not mean they have neglected their family care everyday tasks. Tension between the paid work and care worlds is implicit in entering the labor market, as are the multiple strategies women adopt to deal with it. The Beijing Conference established the need to promote the harmonization of men and women's family and work responsibilities since 1995. Ten years later, the public "infrastructure" of care<sup>1</sup> available in the region is still incipient. This paper describes the shaping of public reconciliation policies (hereinafter referred to as PRPs) in Latin America and describes different avenues and measures to strengthen them.

To this end, questions such as the following must be explored: Is it possible to speak about public reconciliation policies between the family sphere and paid work in the current context of Latin America and the Caribbean? How much progress has been achieved in reducing tension between family and work obligations from the standpoint of public policies and what have been the results? Do these policies assume that household and care work within the family nucleus is women's sole responsibility, or do they suggest a reassignment of historically feminine responsibilities? Do they allow for the revaluing of household and care tasks with respect to paid tasks? Do they propose changes in the organization of the labor market or do they exclusively rely on the family sphere? What measures are the State's responsibility and how are they funded and evaluated? And what are the measures implemented by businesses, families and communities? What are the main institutional and financial challenges faced by these policies? Finally, how can results be evaluated both in terms of their effects on gender equity and the well-being of individuals more exposed to tension between family life and work life, such as children, adolescents and the elderly?

The answers to these questions have been barely addressed in Latin America, particularly from the standpoint of the role of public policy as a promoter of objectives of reconciliation between family life, work life and gender equity. That is the reason why this study is only exploratory in nature, and it will have served its purpose only if succeeds in providing a set of conceptual tools appropriate to delimit and address reconciliation as a public policy objective; in providing an x-ray of public and state institutional actions that could be the starting point to launch reconciliation strategies in the region and, finally, in identifying suggestions to promote qualitative leaps in terms of the State's actions in this sphere.

Bearing in mind this region is characterized by huge contrasts and social, national, ethnic, cultural and gender inequalities, the answers sought require a huge synthesis and interpretation effort susceptible of being furthered and increased to apply it to specific initiatives and measures.

The document is divided into three parts. The first addresses a series of conceptual tools. The second describes the methodology used and findings made. The third includes an analysis of the study and its implications.

## Part I. What public reconciliation policies are about

### “Reconciliation” as a problem

In contemporary societies, there are services and goods (such as clothing) that are purchased in the market; others that are obtained via public services (such as electricity), and many others (such as cooking) produced in the family. Individuals' capacity to subsist and achieve well-being depends on a certain level of combination of goods and services produced in these three spheres (Anne Orloff, 1993; Gosta Esping-Andersen, 2002). The fact that individuals need some of them more than others depends, among other factors, on their income, family networks, the type of State they live in and, to a large extent, on the roles and stereotypes assigned to men and women by society.

Market access to goods and services basically depends on the income individuals are capable of generating. Income, in turn, usually depends on the number and types of jobs demanded by the labor market<sup>1</sup>, as well as the offer people are capable of generating based on their formal education, work experience and, very importantly, the time they can assign to paid work. Still, in today's world, elements such as formal education, work experience and time availability are conditions by factors such as individuals' sex or ethnicity. The market, on the other hand, does not follow rules automatically remunerating or compensating identical “capitals” provided by different individuals in the same fashion: the labor market is also subject to distortions resulting from cultural conceptions, where discrimination and prejudices (gender prejudices, among others) are present. Many studies have shown, for example, that the “equality” of the human capital provided by men and women actually translates into differences in terms of salaries or the possibilities of being promoted that affect the latter.

The labor market is organized around stereotypes: the “ideal worker” (as the standard of the expected), responds to sex-related expectations, such as “male rationality” or “female emotionality” (despite the significant variation in terms of personal traits between men and women). It is not by chance, for example, that statistics usually show medicine as a masculinized profession and nursing or care of children/the sick/elders as feminized professions, in addition to the correlation between these traits and the expected work performance and (unequal) levels of payment. Finally, the different organizations making up labor markets operate on informal levels, based on codes of communication and sociability among individuals. For that reason, income levels are not only the result of training and education<sup>1</sup>, but also of the different possibilities offered to individuals by the labor market depending on the groups they belong to, as well as the use of informal relations.”<sup>1</sup> These elements do not show a random distribution between men and women.

Women have historically played an important role, both in income generation and, particularly, the performance of unpaid work (including household work, participation in family businesses, care and maintenance of orchards, animals, etc.). However, the formal labor market has been organized around the notion of the man-provider as an expectation and a rule, even though the reality of that market is quite different (Joan Williams, 2000). This means that the basic idea for the labor market is that of the availability of working individuals throughout the different stages of their lives on the basis of full-time weekly schedules. Thus, it assumes that those providing income for the household are not, at the same time, responsible for care activities or, if they are, that is a matter they must solve one way or another. Consequently, for practical purposes, those individuals are considered as workers “only” during the time they perform paid tasks.

In addition to other inputs, the production of goods and services in the family basically requires time spent in unpaid activities. In general, women have been the ones performing these activities, particularly those related to care and meeting needs that can not be met in the market due to the insufficiency of income (for example, to send children to a day-care center), because purchasing those services is not something desirable (for example, sending elders to live in a nursing home), or because there is not a market for it (for example, to provide care and affection for the sick).

Access to public goods and services varies widely, from those exclusively destined to low-income individuals to those made available to all the population. The more the offer of these services and their target population expand, the more likely individuals are to address their subsistence by removing themselves from the market (“decommercializing themselves”) or the family (“defamiliarizing themselves”) (Esping-Andersen, 1990; Orloff, 1993).

The production of goods and services in the three above-mentioned spheres of social life (market, public services and family) is crisscrossed by the unequal distribution between men and women. Although women’s biological reproduction capacity is the only one naturally linked to their physiology, the societies they belong to have assigned them unpaid tasks including, among others, child care and the everyday care of individuals’ basic needs, both on the individual and family level, including those related to subsistence, protection, affection, understanding and the right to participation, leisure, creation, identity and freedom (Rosa Bravo, 1998).

“The division of labor by sex assigns domestic tasks of a reproductive and caregiving nature almost exclusively to women. In addition to overburdening women with work, this takes time away from training and recreational activity and limits women’s options in joining the labor force, obtaining more diversified work and earning sufficient income; it also limits their ability to take part in social and political activity”. (ECLAC, 2003:136). The sexual division of labor is at the basis of the social structure and not only generates a power asymmetry between men and women; it is also a source of unequal opportunities affecting women on all levels of their life (Bravo, 1998) and has an effect on gender identity, that is, on the patterns of behavior, values and demeanor expected depending on the sex (María Elena Valenzuela, 2003).

In addition to their historic role as caregivers, over the course of the last decades Latin American women have entered the labor market in larger numbers and most of them are paid for the work they do. By 1990, at least one third of women in the countries in the region were part of the economically active population. Early into the new century, this proportion increased to four and five in every ten women approximately. According to data for 2002, the countries with the highest rates of women’s participation in the economically active population included some as diverse as Brazil, El Salvador and Uruguay (with rates of 50% or more). Those with intermediate rates included Costa Rica, Argentina and Mexico (with rates between 45 and 46%), while one of those with the lowest participation rates was Chile (with 41%) (ECLAC, 2003). This means that the difference between the countries with the highest and lowest participation rates was more than 10%.

In addition to the above-mentioned differences, these data show that productive work is increasingly becoming a women’s matter, which does not mean (re)production and care tasks are no longer in their hands. Transit between these spheres is marked by a tension: the assignment of time dedicated to the family and unpaid work, in general, and the assignment of time dedicated to generating income which, in turn, allows for better and broader access to goods and services in the market. While men’s lives are mainly defined by the labor world, women’s work biographies are permeated by the tension resulting from the assignment of their time and energy to productive work and domestic (re)productive work<sup>1</sup>. This tension increases as they move up in the hierarchical structure. A recent study on women’s entry into the financial services sector of the labor market in Costa Rica, for example, shows that the presence of children under 12 among men bears no relationship with the hierarchical level they have achieved. Among women, however, the presence of children is similar to that among men on the administrative level, but decreases significantly on the professional and managerial levels (Juliana Martínez Franzoni, 2004).

To deal with this tension, women in the world in general, and in Latin America and the Caribbean in particular, are forced to deploy multiple strategies in an attempt to “reconcile” these diverging realities. They work, for example, “double shifts,” which involves working long hours once the paid workday is over; they seek to maintain a strict

control over their workday (for example, but not working beyond their formal work schedule); they prefer half—time jobs; they transform and reduce expectations regarding family care work and waive certain demands related to childcare, and also frequently related to their self-care and/or self-development. Work strategies are supplemented with family strategies. Where sufficient income exists, it is common to hire other women to perform household and care tasks required in the family nucleus. Where income is not enough, they often seek support from other women in the family, including female children, to perform those tasks. In the following sections of this document we examine these and other strategies aimed at dealing with the tension between productive and (re)productive work. In many cases, these are not the result of “choices” in the rational sense of valuing all the different options and choosing the “best”. Similarly to the so-called “survival strategies”, reconciliation strategies are knit from multiple individual and collective actions combining different options and realities.

In addition to emotional, physical and psychological stress, these strategies generate in women serious limitations in terms of their work life; and while that is not the only factor explaining this situation, it leads to women’s horizontal and vertical segregation. This means that women reduce their relative participation in the labor market as they move up in the hierarchical structure, in addition to the fact that there is a high concentration of women in only a few occupations on each level. This situation is found in diverse countries, from the most to the least developed ones: women in general only hold under 10% of the management level positions in the public and private sectors (Isabel Metz and Phyllis Tharenou, 1999). The complexity of the problem is documented by Esping-Andersen’s study on the different member countries of the Organization for Economic Cooperation and Development (OECD). While Sweden shows high levels of reconciliation between paid and unpaid work (expressed, for example, in the high rate of full-time female participation) it is also the country with the highest levels of occupational segregation of women in the labor market (expressed in the high concentration of women in the sector of public social services largely targeted at other women). The United States, on the contrary, shows a really low degree of reconciliation (expressed in the low rate of participation of women with young children), as well as the lowest degrees of occupational segregation (expressed, for example, in women’s largest relative participation in occupations traditionally considered male (Esping-Andersen, 2002). This evidence suggests “tough” choices to make between full entry into the labor market and maternity, a key aspect to reconciliation.

Unpaid work performed in the family nucleus is a factor that affects men and women differently and that, far from being the result of an individual choice, is the product of social organization, which establishes mandates, expectations and definitions of the desirable leading, on one hand, to the feminization of family work and, on the other, cause it to be less valued than that generating income. The same applies to feminized paid jobs: they are less valued than masculinized and mixed jobs, as shown by the corresponding income gaps repeatedly leaning towards the latter (Martínez Franzoni, 2005; Amalia Amauro, 2004).

But it is not only a matter of getting women to access the labor market, which has been traditionally defined following the male parameter and productivity rules as their main goal. It is a matter of redefining the existing tension between productive and (re)productive work, so that both women and men can play a leading role in both spheres (Williams, 2000). This demands the existence of State public policies so that, along with civil society, the State can implement strategies and actions aimed at:

- deconstructing the idea that all working individuals must respond to a single rule, a factor of discrimination against women and sometimes one of disproportionate demands for men, to the extent it has been defined under patriarchal standards, without taking into account their family responsibilities, and entails a series of expectations limiting women’s participation in the labor market (Williams, 2000). This deconstruction involves multiple transformations in the organization of the labor market, the careers of men and women in that market, and families. Like any change in the social structure, it also entails changes in identities and interpersonal relations.



- recognizing care as a central human need the satisfaction of which involves care work, which must be valued as such and assumed by all the members of society so it is no longer an obligatory and devalued task for women. In other words, we should stop denying the social responsibility of care (Sira del Río, 2004).
- prioritizing care for children, bearing in mind their needs for proper development, both on the social and family level, and not the needs of the labor market.

Addressing reconciliation between the family and paid work as a problem requires asking if reconciliatory public policies exist in Latin America and the Caribbean; if that is the case, what do they consist of? In Latin American and the Caribbean we find a series of policies encompassing a diverse set of actions promoted by the state in its role as governing entity, funding agent, provider and/or evaluator, with different degrees and types of social participation through businesses, non-government organizations, social movements and unions, among others. Most of these initiatives were not conceived as actual reconciliation policies. However, they can have reconciliatory effects or not and, therefore, are a starting point to build bridges between work performed within family groups, mainly in the hands of women, and work performed in the labor market. They can involve a broader participation of the market, men or the State itself in the performance of unpaid work and mainly translate into regulations (such as those linked to maternity and breastfeeding), transfers (such as money subsidies to female heads of household) or services (such as those related to childcare). They have been called “harmonization” “compatibility” or “reconciliation” policies. For practical purposes, in this paper we will refer to them as “reconciliation” policies even though, throughout the document, these concepts themselves are the object of analysis.

As explained below, addressing PRPs involves the need for a general definition of “public policies” that allows us to distinguish them from other measures that are not, particularly from strategies carried out everyday by women to deal with the demands inherent in their role as workers and caregivers. Not every public policy is expressed in a legal framework, and not every legal framework expresses a public policy. Furthermore, a statement about a given public policy is one thing, and its implementation is another. That is why it is necessary to identify the phase of the public policy cycle they are in (formulation, adoption, implementation, etc.), as well as the results they have achieved (rhetorical, symbolic, material). This description includes the way the problem is defined, that is, whether we are speaking about family life or re(productive) domestic work; whether the intention is to adapt the former to the latter or vice versa; whether the concept used is that related to reconciliation policies or not, etc.

### **The object of reconciliation: (re)productive domestic work**

According to Cristina Carrasco, the current restrictive conceptualization of “work” establishes that “the only form of work considered as such is salaried work or self-employment, which excludes unpaid activities performed by the members of the household to meet their own needs” (2001:28). As pointed out by this same author, while this definition is more accurate, identifying the notion of work with employment excludes a series of activities that, while carried out in the household, are not part of (re)productive domestic work, for example, taking care of animals or orchards, so common in rural areas.

In contrast with that definition, care tasks include a broad range of activities that, as a result of having been naturalized, associated with the (re)productive sphere and, particularly, experienced and perceived as “non-work”, are more difficult to delimit. “Most female work, that is, most social work, is not conceptualized as such. We are talking about domestic work, household chores, childcare, taking care of husbands/partners if any, and procreation; that is, the different reproductive activities carried out by the “mother-wife” for the survival or quality of life of others. Ideologically, it is synthesized as a natural function resulting from physiological and hormonal processes genetically defined and pertaining to the animal sphere of instincts. The logical complement to this proposition is that women are born to meet the same needs in others”. (Marcela Lagarde, 1993:119-120).

Since these tasks are not conceived as a job, they are not considered part of production (in spite of the fact that they produce a series of services essential to the well-being and survival of humanity, among others), lack market value, are not included in the Gross Domestic Product (GDP), and are not duly identified in National Account Systems.

These activities, which revolve around the physical and emotional care of human beings, have received different names. Their most common denominations include “domestic work”, “unpaid work”, “reproductive work” and “work in the household”. But several conceptual ambiguities have been pointed out in connection with them: does “domestic work” refer to work performed by the family members to maintain the household or to domestic help paid work?; does “unpaid work” refer to work performed by a woman taking care of her family or to unpaid work performed for a family business owned by the husband?; does “reproductive work” refer to giving birth and breastfeeding (biological reproduction) or to the set of tasks that allow for the maintenance of the social structure (social reproduction)?; does “work in the household” refer to unpaid domestic work or to paid work performed in an employer’s home? (UNIFEM, 2000). For practical reasons, in this study we will use the term (re)productive domestic work to refer to the set of activities where time and energy are invested (and, therefore, represent work); in other words, unpaid work basically performed within the family group to meet the care needs of their members<sup>1</sup>.

(Re)productive domestic work is generally performed by women in family groups and, for purposes of this study, it includes tasks linked to:

### **Biological reproduction**

Childrearing and care of dependants for some period of their life as a result of their age (children and elders), disease or physical limitations;

Tasks performed for the well-being of all the members in the family unit: cooking, washing, ironing and cleaning, among others; and,

All those related to affection and the emotional well-being of the members of the family unit.

Despite the wide range of activities involved in these tasks, the one thing they have in common is the fact that they are services:

- that have a cost in terms of time and energy;
- not paid with a salary;
- essential to the biological and social reproduction of society;
- provided everyday;
- devalued and usually rendered invisible.

As already pointed out, (re)productive domestic work has several dimensions, including that of meeting affective and material needs, which are equally important and take place everyday. In addition to this affective dimension, (re)productive work involves a cognitive dimension, that is, one involving the knowledge or skills required to perform a series of tasks. It also involves a normative dimension, this being the reason why these tasks are not a choice, but a “must” or a mandate for women linked to affection towards the rest of the members in the family nucleus.

Generally speaking, (re)productive domestic work is assumed by women of all ages. While not all of them do the bulk of this work, we can affirm that female children, female young people, adult women and elder women perform several of these tasks, and some even perform all of them. Just like domestic (re)productive work includes a universe beyond reproduction and childrearing, these tasks are not only performed by mothers. They have been assigned to the female gender so that, since their early childhood and until they become old, women are the ones responsible for meeting the needs of the family group.

While men and women work in all sectors, the existence of the sexual division of labor is clear: women do most of the domestic, (re)productive, voluntary and informal (paid and unpaid) work, while men mostly perform formal paid tasks in the private, public and NGO sectors, as shown by the time use surveys (TUSs) <sup>1</sup>.

In effect, TUSs conducted since 1995 in Cuba, Mexico and Nicaragua, as well as 43 other countries in the world, allow us to affirm that “women invest more time than men in unpaid work and their workday is longer, to the detriment of their health, nutrition and recreation.” (ECLAC, 2003:153).

One national TUS conducted in Mexico in 2003 shows that, as far as family and domestic work is concerned, men spend more time in this activity between the ages of 8 and 14, while women do it between the ages of 20 and 39. A comparison of the findings of this TUS on unpaid domestic work and results obtained in other countries in the world (Italy, Germany, Finland, Denmark, Australia, Canada, Sweden and France) where these instruments have been applied, shows that Mexico is one of the countries with the largest number of hours spent in unpaid domestic work, and also the one where men contribute with the smallest number of hours to these tasks, which reflects the sexism around which relationships between men and women are structured in that society (María José Araya, 2003).

Finally, reference must be made to (re)productive work which is the object of payment and basically performed by the so-called “domestic workers” or “domestic employees” outside of their own family sphere. A large number of women in the region, many of them immigrants, provide these services by washing, ironing, cleaning and taking care of children or elders; in other words, performing (re)productive work that, as a result of being hired, is the object of payment. However, since performing tasks in the sphere of (re)production has been historically devalued, the conditions in which these “domestic employees” do their job are, in many cases, conditions of overexploitation: they do not obtain the same labor protection under the law; their workdays exceed 8 hours a day; their salaries are extremely low, and they are the potential victims of harassment, sexual abuse, and more.

Thus, (re)production work is raised to the ideological category of work. However, as a result of being “naturalized”, devalued and performed by women (who in addition to being discriminated on the basis of their gender are discriminated due to their socioeconomic condition and origin), it has one of the lowest levels in the labor sphere (Lagarde, 1993).

In addition to women’s increasing participation in the labor market, the different factors already mentioned show the need for the State and public policies to assume a key role, if not in reconciliation, in buffering the tension between paid and domestic (re)productive work.

### **The subjects or (irre)conciliation: social classes, rurality and ethnicity**

Tension between paid and unpaid work is common to all women. However, strategies available to women to deal with that tension vary considerably: the patterns to combine families, markets and the State vary depending on the social and economic level of women and their families. Existing public policies also vary (as will be seen in the next section). Those with more socioeconomic resources combine (re)productive work performed by them and other women in the family with the use of public services and, particularly, with (re)productive work obtained in the market. Women with fewer social and economic resources, particularly poor women, do not have the latter option; they have a more limited menu and basically depend on families and available public services<sup>1</sup>.

While the study of poverty in general –and poverty from a gender perspective in particular– has followed different approaches and faced a series of difficulties, there is little debate around the processes placing women at a level of risk higher than the average, including their disadvantage in terms of rights and capacities related to health, access to land and property; their heavier burden in terms of (re)productive tasks and the limited or null value

assigned to it; discrimination in the workplace, and their limited participation in political life (Sylvia Chant, 2003).

Women's relative poverty is characterized by three major factors: "first, women have fewer possibilities of transforming work into income; second, when women receive income, they face more difficulties in transforming them into a capacity to make decisions; and third, when women can effectively make decisions, these decisions seldom increase their own well-being; rather, they will probably be aimed at improving the wellbeing of others" (Bradshaw and Linneker in Chant, 2003:24). While male poverty is mainly explained by men's position in the labor market, female poverty is explained by the characteristics of families and the role of women in performing reproduction work (Valenzuela, 1998).

According to Bravo (1998), the structural gender determinants of poverty (those for which women are held responsible for most domestic work and family care) include the following:

Women dedicate a large number of hours per day to unpaid work, household chores, childrearing, health care for members of the family, etc. This imposes limits on women's equal participation in the public world and leads to their economic dependence on men.

The biological function of procreation is projected into a social function of care for the members of the family. Thus, there is a tendency to consider women as the only ones responsible for raising children and providing care for the sick and elders. Family responsibilities are usually not shared in equal conditions by the father and the mother, which limits women's ability to decide on the use of their time and work potential.

Women's (re)productive work lacks economic value in contemporary societies (it is not traded in the market). Therefore, it is less appreciated compared to men's economic role, which is more visible and can be dimensioned.

Another aspect worth highlighting is the fact that poor women generally have a more limited "reproductive autonomy", that is, a limited power to decide whether or not to have children and, if the decision is yes, how many and when to have them. In addition to this we have the fact that it is among poor women that maternal mortality is higher, a situation leading to the intensification of reconciliation issues for the rest of the family members, particularly daughters.

A large part of public policy efforts implemented in Latin America and the Caribbean are aimed at contributing to the development of favorable conditions increasing women's capacity to generate income of their own. But these measures often lay more emphasis on addressing formal capacities (such as human capital), rather than necessary informal capacities (such as social capital)<sup>1</sup>. At the same time, for poor women to be able to benefit from these public policies, they must "delegate" (re)productive work, at best through the use of public services and, at worst, by resorting to double or triple work shifts.

Among the groups of women most vulnerable to poverty we have young women, old women and female heads of household. This is the result of their lack of financial autonomy and their limited capacity to generate income of their own, in addition to the unpaid domestic work burden they are forced to assume.

As far as young people are concerned, recent data back this affirmation: in year 2002, approximately 43% of women over 15 living in urban areas in 18 countries in Latin America and the Caribbean did not generate income of their own, with only 22% of men being in this situation. Rural women were even more dependent in all age groups (ECLAC, 2003).

A simple average of the individual income for the urban population age 15 in 14 countries in the region (calculated circa 1999), shows that approximately 46% of women do not have income, while only 21% of men are in that situation (Milosavljevic in Lorena Godoy, 2004). Other factors directly influencing young people's vulnerability include the higher level of pregnancy risk due, among other things, to inadequate sexual and reproductive health

education policies, this often being the trigger of a vicious circle of marginality, discrimination and poverty; more possibilities of contracting AIDS and other sexually transmitted diseases without protection alternatives, as a result of their socialization in a patriarchal culture; dropping out of school to perform domestic (re)productive work in the case of women and, in general for young men and women, the early entry into the labor market in precarious occupations that are often dangerous. (Bravo, 1998).

In the case of older women, while old people of both sexes are exposed to poverty, among other reasons due to the lack of appropriate prevision, health care costs and lack of access to housing, women's higher life expectancy explains why there are more poor women than poor men in this age group. Three factors make the situation of old women more difficult: most of them do not have access to social security on their own as a result of their domestic (re)productive work, and they only receive a percentage of the husband's salary as a pension (if they had a legally recognized husband) provided they qualify for it; women who once were part of the labor market had lower incomes and/or less job security. Therefore, their pensions are lower. Finally, they are often excluded from the social security system due to their higher participation in occupations in the informal labor market performed in precarious conditions (Valenzuela, 2003).

As regards female-headed households<sup>1</sup>, the per capita income in female-headed households for 2002 in an average of 17 countries<sup>1</sup> accounted for 94% of male-headed households; in 9 of 18 countries<sup>1</sup>, the proportion of female heads of household in absolute poverty is clearly higher than that for male heads of household (ECLAC, 2003) "While Latin American data on the higher level of poverty in female-headed households are not conclusive for all countries, it is clear that the weight of extreme poverty is disproportionately high. In almost all these countries (10 of the 12 countries considered)<sup>1</sup> the proportion of female-headed households among the extremely poor is higher than the average of total households, and the situation is even worst in those countries with a broad presence of female-headed households" (Valenzuela, 2003:35).

The debate around the relationship between female headship and poverty has been intense. Data show that these households are the poorest in some countries in the region, while in other countries this situation is inexistent. However, there is a vulnerability in these households due to their condition of single parenthood, a characteristic found in 80% of them and placing them in a situation of disadvantage in view of the absence of a male figure that generally has more work experience, a wider range of jobs and salaries available, and few or no family obligations (Valenzuela, 2003). The number of female single-parent households has continued to increase in the region. These households have a lower per capita income compared to male single-parent households (ECLAC, 2003). While not all of these households are poor, they are a lot more vulnerable to poverty as, in general, they are family nuclei where women are the only breadwinners and have the obligation to perform domestic and care tasks. In fact, the differences between the total income of households with a man present and those where women don't have a cohabiting partner are significant (María Nieves Rico, 1998). As stated by ECLAC, it is not that female headship, by itself, leads to more poverty, but 90% of female-headed households do not have a partner (and thus, a second individual generating income or reproductive work), while only a little over 10% of male-headed households are in this situation.

Compared to other women, the tension between productive work and (re)productive work among female heads of household is exacerbated because the volume of (re)productive work is higher, care and social protection services are more limited, and services purchased in the market are virtually inexistent. This is because, as documented by Leda Marengo (et.al 1998), ECLAC (2003), Bravo (1998), and Carine Clert (1998), these women:

- have a number of financially and emotionally-dependent children and elders;
- have little education and technical training, a situation preventing their access to better-paid and more qualified jobs;

- participate in labor markets segmented by sex, with an offer of jobs they can access. These jobs, however, are non-qualified, temporary, intensive and do not provide social protection;
- have limited access to productive resources, land and credit;
- face unequal hiring and salary conditions;
- lack representation and organization; and
- ignore their rights.

Thus, in order to fulfill their obligations they must work double and sometimes even triple work shifts and are exposed to huge tensions in fulfilling the role as caregivers and providers demanded from them.

At present, most poor people live in urban areas, but this does not mean rural poverty has declined. While in 1980 54% of rural households lived in conditions of poverty, by 1990 this percentage had increased to 58%, to then go back to 54% in 1997 (ECLAC 1999). While women's poverty in urban areas has increased significantly, rural households are more likely to be poor compared to urban ones (Bravo, 1998). Productive and reproductive work is performed in very precarious conditions; women perform tasks such as taking care of orchards, sheep and goats; they carry water to wash clothes and perform this task outdoors exposed to adverse weather conditions; their health condition deteriorates faster as a result of their housing conditions; their access to health centers is more difficult, and the quality of these services is usually lower; education is more difficult to access, has less quality, and many female children are not enrolled in school; they lack access to land, have higher fertility rates and have no access to resources and services; they have high levels of unemployment and underemployment and are the victims of inequality in terms of access to jobs, decision-making bodies, land, water, credit and goods in general. (ECLAC, 1997; ECLAC, 1999).

At present, the indigenous population accounts for approximately 10% of the total population in the region, while the population of African descent (including black and mestizo people) accounts for 30% (ECLAC 2001). After centuries of exclusion and denial, both populations continue to be treated as minorities –although not always-, and most of them live in conditions of poverty and have been denied the right to an education taking into consideration their cultural, linguistic and religious specificities. In many cases, they have lost their main livelihood (for example, land, territory and natural resources) and for several decades they have been forced to migrate to large urban centers, where they only have access to precarious, low-salary and low-quality jobs, (ECLAC, 2001). As stated by Lagarde (1993), African-Latin and indigenous women experience a triple discrimination: one related to gender, because they share their oppression as women with the rest of women in the social whole; another related to class, because most of them live in poverty conditions, and another related to ethnicity, because their racial and ethnic belonging puts them in a situation of disadvantage and disrespect.

Thus, they share common elements with other women because of their gender situation, but experience it differently as a result of the intersection of this discrimination with class and ethnic-racial discrimination. The three are determinants of the marginalization experienced by these women in terms of access to work, education, social and health opportunities and productive resources, among other things, which intensifies their condition of poverty.

### **Public reconciliation policies**

Not all social problems are considered public, and not all public problems are necessarily the object of public policy. Public policy is based on agreements, often conflictive, regarding problems, objectives and solutions. Violence against women is one of the issues in connection with which more important agreements have been reached in Latin America and the Caribbean, although these have to do more with identifying the problem, rather than the adoption of solutions and mobilization of resources for their appropriate implementation. On the other hand, abortion splits the waters between those who demand making it the object of public policy and those who are not willing to consider it a problem.

There are almost as many definitions of public policy as authors addressing it. The common idea behind these definitions is that public policy is the sum of government activities resulting from decisions made or not, to the extent they have a negative or positive influence on people's lives, and they are carried out directly or indirectly through other agents (Thomas Dye, 2001; Guy Peters, 1999). With this definition of public policies, it is possible to distinguish between reconciliation strategies deployed by people and families, and those more specific ones associated with current public policies. This paper mainly focuses on the latter<sup>1</sup>.

Public policies are reflected in jurisprudence, in the legal body, although not exclusively or necessarily. As affirmed by Anne Schneider and Helen Ingram (1993), policies are revealed in texts, practices, symbols and discourses. They can be *de facto* and may have never been legally sanctioned. This paper is primarily based on the legal body and existing texts and discourses about PRPs in Latin America and the Caribbean. Based on the findings presented, it is possible to advance the analysis of factual policies and practices that coexist with legal bodies and discourses on what is done, and should be done, in terms of reconciling paid work and (re)productive domestic work.

The following are some basic conceptual distinctions that, in the next section, are applied to the introduction of empirical findings on public reconciliation policies in Latin America.

#### **Public policies: regulatory, distributive and redistributive (Lowi, 1964):**

Regulatory policies are those that define the rules of the game for the operation of a broad aggregate of individuals and public and private organizations. They are usually highly specialized and defined "from the top". A large part of PRPs fall in this policy category. Examples are those establishing maternity leaves and breastfeeding breaks at the workplace, which are part of the broader whole of work regulations.

Distributive policies refer us to other actions through which the State allocates its resources, for example, in the field of public works and government purchases. They tend to respond to pressure groups and coalitions and involve decisions made "one at a time." We did not find PRPs in this category. An example would be a state purchasing policy rewarding providers implementing reconciliation measures.

Redistributive policies allow the State to reallocate resources among different population groups and sectors. They usually involve priorities and conflicts, because resources allocated to a group are not assigned to another. They tend to be sensitive to pressure "from the bottom" (although with significant variations depending on the power of the stakeholders in question; the relationship with poverty reduction policies targeted at beneficiaries with very little "voice" is one thing, and health or pension policies involving beneficiaries or providers with a lot of weight is another). Many PRPs fall in this category. Examples of these are childcare centers or nurseries and other policies that require public funding for care, whether executed publicly, privately or by non-profit organizations.

Additionally, following María-Ángeles Durán's classification (2004), PRPs can be:

- Sequential: Domestic (re)productive work is alternated with paid work (in the labor market) so the two do not coexist in time. They are short-term measures. Some examples are maternity or sick-child leaves. These policies have limitations because they are not that appealing to employers and are out of the reach of individuals unemployed, with precarious jobs or pursuing professional careers.
- Derivative: When the State promotes the transfer of domestic work to other women in the family; for example, grandmothers, older sisters, etc., whether paid or not.
- Aimed at the market: This type of policies are becoming highly popular among people with enough income to pay for services such as child care centers, school transportation, nursing homes, domestic and catering services, etc.

- Aimed at non-commercial institutions: These depend on the existence of public, community and volunteer services.
- Aimed at reshaping: (a) family roles: particularly male and female ones, both within the couple and between generations, specifically in terms of the sexual division of labor between male and female children or other members of the family group. This means that, at the same time women intensify their provider role, men do the same with their caregiver role; and (b) labor roles: particularly the notion that male or female workers, as a rule, must be permanently and completely available throughout the workday and their work life. They involve deep changes in the organization of the labor market, historically designed for individuals with no care-related responsibilities.

### **Concrete actions**

Public policies in general, and reconciliation policies in particular, can be expressed in regulations (for example, labor regulations to formalize workdays and social protection); transfers (for example, monetary subsidies for maternity); and services (for example, daycare centers). This legal assignment of regulations, transfers and services also involves an assignment of values and meanings of the desirable and the possible. An effort was made in this paper to identify examples of each of these different types of public policy, whether their explicit purpose is reconciliation or not.

### **Stakeholders**

Thematic “networks” or networks related to public policy issues (Hugh Hecló, 1978) involve a series of local, national and regional “official” and “non-official” stakeholders committed, from different places, to gender equity. This concept allows us to address the different PRPs proposed by different stakeholders, on different levels, that have promoted or promote them around a series of similar concerns and with some level of coordination. This coordination can be normative (that is, via actions following the same guideline, such as accords reached at the Women’s World Conference, or research and recommendations made by ECLAC); mimic (that is, based on imitation or copying cases considered models or policy examples), or coercive (that is, based on the imposition of more powerful stakeholders).

Public policies are implemented by institutions and the government controlling them, including women’s national mechanisms, but they are also promoted by a constellation of stakeholders that do not necessarily belong to the State. In Latin America and the Caribbean, international cooperation agencies such as ECLAC and others in the United Nations System have played a very important role. Civil society has also participated, particularly the feminist and women’s movement and organizations. These stakeholders have demanded the execution of policies, influenced their design and adoption, and have often participated in their execution. That is the reason why in this paper we are considering these different stakeholders’ contributions to the shaping of reconciliation policies, provided they refer to State public policies and are publicly available.

### **Shaping cycle**

To address PRPs it is not enough to say whether they are being implemented or not: it is necessary to establish if they are considered necessary, if options have been discussed to implement them, if these options have been adopted, etc. Something useful to this end is the application of the public policy cycle, that is, the different moments an idea goes through before it becomes an intervention tool for public institutions. This cycle is one of the main tools to analyze public policies (Charles Jones, 1984). It is a heuristic and analytical instrument and, to that extent, it does not mean an idea necessarily has to go through these moments or follow that sequence or order.

The following are the main moments in the public policy cycle based on which we can characterize PRPs:



**Problem definition:** this involves the argumentation of an aspect of social life requiring the public policy intervention. In the case of equity public policies, women's organizations and national mechanisms promoting gender equity have been the ones mainly highlighting the existence of problems such as gender violence or women's limited political participation, which are public and therefore require public intervention.

**Inclusion in the public agenda:** this involves other stakeholders' recognition, to some extent, of the need to think of public policy measures addressing the problems raised. This recognition does not necessarily lead to identifying and agreeing on solutions.

**Identification of solutions:** this involves the shaping of potential public policies that might totally or partially address the problem in question.

**Adoption of solutions:** this involves the adoption of measures addressing the problem defined by those who have that power in their hands. That is the case of laws addressing violence against women or positive affirmation measures to promote participation in political parties and public institutions.

**Implementation:** this involves the mobilization of institutional, technical and financial resources to address the problem agreed upon. Some PPs might have reconciliation effects even though they were not designed with that objective.

**Evaluation:** this stage involves some type of assessment on results achieved vs. resources invested (cost-benefit and cost effectiveness), conceptualization of the problem, objectives defined, changes to solutions proposed and, hopefully, the impact generated<sup>1</sup>.

The progression from one phase to another is not linear and does not always follow the same order. In the case of PRPs, however, evidence suggests that such progress is variable depending on the phase and increases as progress is made from the initial to the following phases.

### **Results of public policies**

In order to evaluate the scope of reconciliation policies, we use a scale designed by Amy Mazur (1995, in Stevenson, 2004), adapted by Linda Stevenson (2004) and slightly modified in its definitions<sup>1</sup>. This scale distinguishes results depending on whether they are rhetorical, symbolic or material.

Rhetorical results involve advances in the definition of the problem and even its inclusion or acceptance in the public agenda, although not necessarily in the institutional agenda or the agenda of those who have the authority to define public policies. One example is the recognition that domestic (re)productive work involves dependants other than children.

Symbolic results are those included in the institutional agenda and "in line" for decision-making. They also include measures adopted but not necessarily implemented, either due to the lack of political willingness or because they have design problems that make their implementation difficult. One example is labor legislation, the implementation of which is threatened by the increasing informalization of the labor market.

Material results are achieved if measures are being implemented and these begin to have some significant effect on the problem they intended to address.

It is a scale, considering it is desirable for policies to achieve material results; a symbolic result is better than a rhetorical one, and a rhetorical result is still a result.

The progression from one type of results to another is not a linear process. Some measures can be included in the public agenda and immediately translate into material results, while others might only yield rhetorical results for a long time.

As explained in the following section, many of the challenges in the field of PRPs in Latin America and the Caribbean are still in the phase of inclusion in the public agenda and, thus, of becoming a concern shared by stakeholders making decisions, whether in the Executive or the Legislative. The challenge for these measures is to start having at least rhetorical results. That is the case of universal measures explicitly aimed at reconciliation. Other measures, particularly those that do not necessarily have explicit objectives, but have reconciliation effects, have achieved material results for at least one part of the population. That is the case of regulations linked to entry into the labor market. Finally, one third group, particularly that of poverty reduction policies, could have symbolic results.

## **Part 2. What we currently have in Latin America**

### **Method**

Field work was done during the months of October and November 2004 using three different sources. These sources were consulted either via e-mail or by logging on to web sites (including those of international organizations such as ECLAC, ILO, IDB, UNIFEM, UNICEF, OAS and the Organization of Ibero-American States, as well as a series of links found on those sites). The sources were the following:

- a) Experts in the field of public policies and gender equity were consulted in connection with actual reconciliation policies.<sup>1</sup> They responded almost immediately, and their surprise before the question made is a significant fact described in the section on findings.<sup>1</sup>
- b) We made a review of official sources, including the different agencies leading gender equity policies. This search was quite extensive and revealed the different levels of information available on-line in the different countries. While in some cases searches produced results almost immediately, in others results were almost inexistent. For this reason, we also requested information from all the different national women's mechanisms in the region<sup>1</sup>, excluding French and English-speaking countries. Despite having sent the same e-mail twice, only two responses were received: one from the Women's and Social Development Ministry in Peru with the name of the person responsible for providing the information requested, and another from the Special Secretariat for Women's Policies in Brazil informing us about the National Plan on Women's Policies, which was approved in December 2004 and includes, among its priorities, to ensure compliance with legislation in the field of domestic work and stimulate the division of domestic tasks. To this end, the plan proposes three actions: a campaign aimed at valuing domestic work and promoting the division of domestic tasks, and the design of a methodology for the inclusion of domestic work in macroeconomic estimates. Something particularly difficult was finding up-to-date official information on poverty reduction programs. Most of these deficiencies were corrected through the use of recent studies conducted by ECLAC's Women and Development Unit, including some comparative ones.
- c) A review of previous studies was also made. Studies to assess the performance of public policies in promoting gender equity in Latin America are still scarce, particularly those seeking to go beyond the mere description of actions. Comparative analyses (those that allow us to know the institutional conditions that inhibit and make different measures possible, and those that consider the short, mid and long-term financial and non-financial cost of the different options) are particularly weak. These weaknesses have a negative effect on the possibility of having a set of options combining desirability and feasibility criteria.

In addition to field work, the purpose of the study was to develop a conceptual framework allowing the organization and interpretation of evidence. This framework seeks to combine the analysis of different types of measures in each country, as well as the comparison of similar measures between countries. The findings section will have achieved its objective if

the interpretative framework provided to construe existing empirical data is not only useful in interpreting these data, but other data available in the future.

Evidence is presented in two different formats. On one hand, we address existing public policies in six countries: Argentina, Brazil, Costa Rica, Chile, El Salvador and Uruguay. These six countries were chosen based on the social public policy classification proposed by Fernando Filgueira (1998). According to it, public policy has been relatively universal and inclusive (Costa Rica, Uruguay) although with recent processes of investment decentralization, focalization and privatization (Argentina, Chile); significantly “dual” depending on whether the population is urban or rural (Brazil); or has experienced little development and limited results in terms of equity (El Salvador). On the other hand, we provide examples and experiences of interest in the rest of the countries in the region.

Three important clarifications: First, since this is one first effort of comparison between countries, we work with formally established policy definitions (including how broad or restrictive the definition of the target population is), but not with effective coverage and accomplishment levels<sup>1</sup>. Second, we have addressed the different types of public policies, rather than social public expenditure amounts, as previous studies have shown that results in terms of gender equity can be very different even with similar expenditure levels. Following Esping Andersen’s recommendation, our objective is to identify how much is spent and under what criteria; in other words, how money is spent. Jenny Pribble (2004) validates this approach to the performance of public policies in terms of gender equity in countries in the Latin American region. She compares Chile and Uruguay, two countries with similar social public expenditure levels, and analyzes their respective effects on gender equity. She does not refer to them as “reconciliation” policies, but addresses three key actions aimed at reconciling: family allowances, childcare and maternity leaves. Her analysis shows that public policies in Uruguay tend to favor reconciliation a little more compared to Chilean ones. For example, while in Uruguay access to family allowances establishes similar requirements for men and women, in Chile unemployed husbands or partners are not recognized as dependants. On the other hand, although the Chilean social security legislation provides for more favorable maternity leaves, these are only available to a portion of the total number of formal female workers as a result of a labor market highly segmented between formal jobs with contract, formal self-employed workers and informal work. In Uruguay, on the contrary, these policies are applied to all formal female workers and have also been extended to independent female workers<sup>1</sup>.

We have addressed three types of measures. The first two are not explicitly the result of reconciliation efforts, but have relevant effects in this field; the third refers to measures explicitly aimed at that objective. The three types of measures are: those linked to social security, with exceptions targeted at formal salaried female workers; those in the framework of poverty reduction, targeted at extremely poor workers or workers below the poverty line; and those actually aimed at reconciliation.

## Findings

The following is a description of the current situation of reconciliation public policy in Latin America. To this end, we have addressed the performance of public policies in terms of reconciliation between paid and unpaid work, which can be the result of policies deliberately aimed at such reconciliation (the least) or policies with reconciliation effects, even if that was not their original intent (the most). The main findings are presented depending on whether they are measures adopted in the framework of:

- social security and, thus, targeted at those who are part of the formal labor market; or
- poverty reduction and, thus, targeted at women below a certain income level, particularly female heads of household; or
- actual reconciliation strategies based on a universal criteria, targeted at women as such.

In each of these cases we analyze whether they are sequential, derivative or role reformulation policies. We also indicate if there is any evidence of rhetorical, symbolic or material results.

These measures emerged in the region as part of “families” of transformations that followed this same order; from social security measures emerging in three “waves” between 1920 and 1960, to poverty reduction measures in the early 80s as part of stabilization and structural adjustment processes; to those actually known as reconciliation measures starting after the 1995 World Conference on Women held in Beijing.

The following questions are answered for each of these three sets of measures:

- In what moment and in response to what concerns were these measures included in the public agenda and what problem or set of problems have they sought to address?
- What concrete measures have been identified as part of the “menu” of solutions proposed and which of these have been implemented? Are they mainly regulations, monetary transfers or services? What is known from the budgetary standpoint?
- Are they sequential, derivative or responsibility reassignment policies, or a combination of the different types?
- How have they been evaluated, if that is the case, and what are the results generated, including the budgetary impact? To what extent is it possible to speak about symbolic, rhetorical or material results?

### **Reconciliation policies linked to social security**

These policies are measures targeted at paid working women in the formal sector, most of them salaried, in their capacity as paid workers who pay fees to a risk protection system such as those for sickness and retirement. These programs protect work-related rights and are mainly reflected in monetary transfers and time spent in domestic (re)productive work during pregnancy, childbirth and breastfeeding. They are targeted at caregiver mothers and consider a small range of activities associated with biological and social reproduction starting at birth. The eligibility requirement is to be a female formal worker. The objective is the regulation of paid work in general and the protection of maternity at the workplace in particular. In some cases these transfers fully cover a woman’s salary over a previously defined maximum period of time; in other cases, they only cover one portion.

*In what moment and in response to what concerns were these measures included in the public agenda and what problem or set of problems have they sought to address?*

These policies emerged along with the regulation of labor and, specifically, social security, which in Latin America and the Caribbean emerged in three “waves” in the field of health and, mainly, in the field of pensions. The first ones were the so-called “pioneer” countries (Argentina, Chile and Uruguay), followed by “intermediate” countries (Costa Rica and Mexico) and the “late” countries (the countries in the Caribbean, except for Cuba, and Central America, except for Costa Rica) (Carmelo Mesa-Lago, 1989). The first group achieved a high level of coverage through social protection systems highly segmented in occupation groups that tended towards unification in the 60s and 70s. The second group created relatively unified broad-coverage systems. The third group created even more unified systems, but with highly limited coverage (Mesa-Lago, 1989).

From the standpoint of reconciliation policies, social security systems were created to address the needs of a provider man and the dependants under his charge (his wife and children and, in many countries, the de facto partner added afterwards) under the assumption that this provider would have a formal job with no interruptions throughout his lifespan. Women were covered to the extent they were dependants or once they became providers and, for example, gave birth and requested maternity leaves. In some countries these leaves were paid from the beginning, in others they were not; in some cases social security fees during leaves were recognized, while in others they were not, which means women had to postpone meeting their retirement requirements. In Costa Rica, for example,

up until 1996 an insured working woman with three children lost one year of social security fees (12 months, that is, the equivalent of three maternity leaves).

Until the 1980s, social security systems were distribution or collective capitalization ones (in other words, contributions went to a common pool from where benefits were later obtained) and admitted a certain level of redistribution of resources among people. In this scenario and, by way of example, in those countries where their remuneration was regulated maternity leaves were funded collectively via the contributions of a large number of individuals. As of 1980, reforms tended to establish, to a larger or lesser extent, individual capitalization systems (that is, individuals receive benefits exclusively based on the amount contributed, both for pensions and health services)<sup>1</sup>. In other words, each individual must fund his/her own risks. Individual capitalization (that is, making contributions to an individual account to fund pensions) has faced setbacks in terms of the collective funding of risks such as disease and disabilities, including maternity leaves available in so many sequential reconciliation measures. These systems vary depending on whether they replace previous collective capitalization systems (like those in Chile, Mexico and El Salvador); parallel systems (like those in Peru and Colombia); or mixed systems (like those in Argentina, Costa Rica and Uruguay)<sup>1</sup>.

The same has happened in the field of health care, which has begun to become part of individual funding systems, with public systems exclusively left to the low-income population. In these systems, insurance plans define service packages based on individuals' ability and willingness to pay, as well as risks related to age, sex, the individual's health history, etc. This has led to the so-called "adverse selection", under which service providers seek to service the population with fewer health risks or, in case they service a higher-risk population, this risk translates into higher contributions. From the standpoint of gender equity in general, and reconciliation in particular, adverse selection has negative implications for women, considering that, for example, it commercializes health requirements associated with maternity (specifically pregnancy and childbirth), as exemplified by the programs "with or without uterus" (that is, including services associated to biological reproduction or not, with those including them being more costly). A good example of an individual capitalization system is the Chilean one. At present, the only health systems that continue to be universal in coverage and that, therefore, do not set limitations to the type of services they offer, and do not charge beneficiaries for them, are those in Cuba and Costa Rica.

Maternity leaves have usually been part of social security. As a result of a series of reforms, maternity has gone from being considered a social function protected by the State in many countries, as part of social security, "to an individual issue that, worsened by the withdrawal of state social services in most Latin American countries, makes the situation of working women complex" (Laura Pautassi, Eleonor Feur and Natalia Gherardi, 2004:35). For this reason, the achievements made to expand sequential PRPs and, for example, include men in paternity leaves, are policies whose reach is gradually decreasing, both because solidary systems are decreasing in number, and because they cover a decreasing proportion of the economically active population. In this framework, one alternative has been that of "removing" maternity leaves from the field of social security to fund them with resources from the national budget, instead of doing it in a tripartite fashion (the case of Chile).

Even in those countries that continue to fund leaves in the framework of social security, there is a tendency to encourage funding not only by those employers hiring women of reproductive age. The reason for this is that, when these are the only ones funding leaves, the cost increase creates a "boomerang effect" that leads many employers to reduce the hiring of women, implement pregnancy prevention controls or, in case of pregnancy, fire employees without recognizing their labor rights. In Costa Rica, for example, the cost of replacing a pregnant worker and meeting all social security obligations for an employer is 138.23% of the actual payroll cost (Juliana Martínez and Mauricio Castro, 2001). The alternative is that, while still funded by social security, maternity at the workplace should be funded via general contributions and not via those specifically made by employers hiring pregnant women. Estimates for Costa Rica show the increase in contributions would be

minimum, to wit, less than 0.5% of the payroll cost and even less depending on whether they are distributed among employers or, for example, between employers and male workers (Martínez and Castro, 2001). In fact, if distributed between all male workers and employers, costs would still be lower, because they would be distributed among more people (as opposed to funding exclusively by employers of pregnant women). In addition to being the fathers of unborn children, men have many advantages over women in the labor market, this being the reason why, in addition to solving the financial aspect, they would represent an affirmative action in favor of women (Martínez and Castro, 2001).

*What concrete measures have been identified as part of the “menu” of solutions proposed and which of these have been implemented? Are they mainly regulations, monetary transfers or services?*

They are mainly regulations (the case of breastfeeding) and monetary transfers (the case of maternity leaves).

Table 1 shows the situation in terms of the measures found in the six countries selected. In addition to indicating if a country has each of the different measures or not, the last row includes a simple cumulative index identifying those with the largest number of measures of this type. The last column shows the number of countries that have incorporated each measure. Except for Uruguay and Costa Rica, these measures are aimed at formal salaried female workers. In these two countries they also include self-employed female workers. In Chile the measures are more limited and are only targeted at a portion of formal female workers, those with an employment contract (Pribble, 2004). As far as the eligible population is concerned, their main limitation is the fact that they regulate a decreasing portion of the labor market and exclude informal labor, where there is an accelerated feminization of labor.

#	Measure	Argentina	Brazil	Chile	Costa Rica	El Salvador	Mexico	Uruguay	Total No. of countries with measure
<b>In cases of maternity / paternity</b>									
1	Prohibition of pre/post abortion layoff								6
2	Maternity leaves (in weeks)	(13 w)	(16 w)	(18 w)	(16 w)	(12 w)	(12 w)	(12 w)	7
3	Benefits during maternity <sup>1</sup>	T	T	T	T	P	T	T	7
4	Maternity leave for disease resulting from pregnancy or childbirth								6
5	Breastfeeding breaks <sup>1</sup>								6
6	Paternity leave (in days) <sup>1</sup>	(2 d) PY	(5 d)	(1 d)	PY				5
7	Maternity leave for adoption (in weeks)	(13 w)		(12 w)	(12 w)			(6 w)	4
8	Paternity leave for adoption	(2 days)		(12s)	PY				3
9	Appropriate place for breastfeeding								2
10	Paid leave if child has post-leave health problems, in weeks	Down syndrome (24 w)							1
11	Post-leave unpaid leave								1

12	Paternity leave for mother's death <sup>1</sup>								1
<b>Permanent</b>									
13	Prohibition of pregnancy test								1
14	Sick-child leave <sup>1</sup>								3
15	Sick-dependant leave								1
16	Day care centers <sup>1</sup>								5
Total measures per country									

**Source:** Prepared by the authors based on Laura Pautasi, Eleonor Faur and Natalia Gherardi. 2004; [www.mujeresdelsur.org.uy](http://www.mujeresdelsur.org.uy); <http://www.cnm.gov.ar/>; <http://www.sernam.gov.cl/>; [www.inamu.go.cr](http://www.inamu.go.cr); <http://cedoc.inmujeres.gob.mx/>

Table 1 shows Argentina and Chile are the two countries with the highest “density” of measures (13 and 12 of a total of 16, respectively), followed by Costa Rica (9), Brazil and Uruguay (7) and Mexico and El Salvador (6). The most extended measures are those complied with in the event of maternity: maternity leaves and social security benefits during such leave. The seven countries have this mechanism. These measures are followed by the prohibition of lay-off during pregnancy, breastfeeding breaks and leaves for disease resulting from pregnancy or delivery complications (6 countries), and paternity leaves and provision of daycare centers (5 countries).

Measures susceptible of operating permanently or for more extended periods of time to contribute to reconciliation exist in fewer countries. That is the case of daycare centers for children of working mothers, regulated in 5 of the 7 countries, which are provided for by the law depending on the number of women working in the establishment. But employers can operate below the minimum requirements established by the law. For this reason, a reform has been proposed in Chile so that the minimum number of women can be achieved among various establishments within a certain geographical radius. Sick-child leaves exist in three countries: Argentina, Chile and El Salvador. Sick-dependant leaves only exist in El Salvador, and the same happens in Chile with the prohibition of the pregnancy test, which is also a measure employers can use to reduce the impact of the rest of the reconciliation measures. While these measures are not legal, they are common practice and, because they are illegal, they are very difficult to document.

*Are they sequential, derivative or responsibility reassignment policies, or a combination of the different types?*

The most extended policies, maternity leaves and measures related to childbirth, pregnancy and breastfeeding, are sequential policies that allow women (and in specific cases men, for example, for the adoption of a minor or if the mother dies of childbirth-related causes) to be temporarily absent from the labor market to terminate pregnancy and give birth (in the case of women) and/or engage in care of the newborn during the first months of life and breastfeeding with salary (both cases).

Historically, men have enjoyed paternity leaves of only a few days (no more than five). Bills were recently proposed in Argentina and Costa Rica to extend these leaves to 15 working days in the former, and in the latter so that within the first 40 calendar days of childbirth, the father has one hour a day to assist in family normalization and adaptation tasks. This implies an incipient redefinition of expectations around the role of men in biological reproduction and newborn care. This can be considered an indicator of change, from exclusively sequential reconciliation strategies to the incorporation of measures that could lead to a reformulation of roles.

The least extended policies are derivative ones, such as daycare centers, and responsibility reassignment policies, such as paternity leaves. A particularly important aspect is that of daycare centers, which would allow to extend maternity leaves to years (3, 4 or 5 years)

instead of months. It is interesting to note, however, that these provisions are only associated with the number of working women, regardless of the fact that working men are the fathers of young children. The exception is Paraguay, where article 134 of the Labor Code establishes the obligation to set up day care centers or rooms for children under 2, in companies with more than 50 workers of one sex or the other, regardless of the number of children.

*What stakeholders have participated in the shaping of these policies?*

Pension and health reforms were generated “from the top”, at the request of governments, with the participation of international financial organizations such as the World Bank, the Inter-American Development Bank and the International Monetary Fund, as well as social security specialists (Mesa-Lago, 2004). While most previous systems left a lot to be desired in terms of coverage and equity of benefits, the truth is that the new paradigm of social security re-commercializes the coverage of risks such as old-age, disabilities, death and disease. It also re-familiarizes such coverage, as individuals who lack enough income to purchase all the services they need in the market resort to community family care strategies and strategies deployed via interpersonal networks. This leads to negative effects in gender relations considering that, unlike collective capitalization or distribution systems, the new systems fully reproduce inequalities inherent in the labor market. In those cases where they evolved under democratic systems, workers’ organizations either resisted these change processes, achieving, for example, the combination of collective and individual systems (Costa Rica), or managed to prevent new systems from touching individuals already retired (Uruguay).

The main stakeholders in the framework of these changes have been governments, social security and health agencies themselves, financial bodies, the financial system in general and specialists in the field. Where organized civil society has participated, it has rather tended to resist such changes. If what we are discussing here is the mere responsibility of the State, and even that of employers, in funding risks that are already socially recognized, such as disease or death, what can we say about new risks and demands with respect to reconciliation measures?

In order to address PRPs with these stakeholders, the financial aspect must be already dealt with by estimating the cost of collective funding of maternity in the workplace via the budget of the central government or that of social security. Financial cost estimates are also required considering the absence of this type of measures, both for the working mother and newborns.

*What are the results achieved so far and to what extent is it possible to speak about symbolic, rhetorical or material results?*

For the most part, they have achieved material results for formal salaried women. They facilitate the sequential reconciliation between productive and (re)productive work associated with birth and care during the newborn’s first months of life. These results allow reconciliation from the standpoint of job stability, although not necessarily beyond it. Leaves, for example, do not protect women against the usually informal “penalties” affecting their careers and job mobility resulting from their absences for several months. Always focusing on formal employment, we can say that the higher the position in the occupational hierarchy, the bigger the informal penalties against women exercising rights associated with maternity at the workplace (see Martínez, 2005). For these women, and hopefully for an increasing number of men, more effective reconciliation measures may allow parents to take newborns to the workplace, rather than being absent for two to four months, a period of time difficult to recover upon their return. The more a job is associated with a career, and therefore with the individual’s availability for the organization or company, the more difficult it is for rights on paper to become a reality, unless a high cost for such career is paid. This situation simply means that, to be effective, these reconciliation measures must be associated with changes in the organization of the labor market itself and the standard of worker it promotes.



*What is is potential and effective coverage of these policies?*

Table 2 shows the economically active female population, whether eligible for measures associated with social security or not. The fact that they are eligible does not mean they are covered. To assess eligibility, the table shows the proportion of paid working women vs. the total population and the distribution of the female economically active population occupied by situation in the labor market, whether salaried or not. These rates vary significantly between the rural and urban environments, with the largest proportion of female EAP in the urban sphere. Since ECLAC's Social Panorama lacks data for the rural sphere, only data for the urban sphere are shown. The eligibility indicator (based on the situation of individuals in the labor market) shows the relative scopes a strategy to expand PRPs can have based on a close relationship with the labor market.

Are they eligible?	Argentina	Brazil	Chile	Costa Rica	El Salvador	Mexico	Uruguay
Yes, formal workers	82	73	78 <sup>1</sup> (not necessarily all eligible)	73	54	71	77
No, self-employed and non-salaried	16	24	19	23	43	27.	21
No, employers	2	3	3	5	3	2	2
Total	100	100	100	101	100	100	100

Source: Social Panorama, 2003. Decimal fractions were not used in the table.

This table shows that women's eligibility to participate in social security measures (including some key measures to reconcile productive and (re)productive work, such as maternity leaves), ranges from 54% (in countries with higher levels of informalization such as El Salvador) to 80% (in countries with less informalization such as Costa Rica or Uruguay). In addition, in the mid and short-term, changes observed in the labor market reflect an increase in this trend. On the other hand, reported salaried employment figures include significant proportions of precarious employment, which has no labor protection at all. Informal unsalaried employment estimates vary depending on the different methodologies used (Trejos, 2004). In any event, this reality suggests that, despite being an important achievement in the field of labor rights, efforts to protect maternity at the workplace should not be mainly or exclusively associated with social security, considering that, even in the best scenario, by definition, it excludes the great majority of women who, to date, despite the significant increase in their participation in the EAP, do not work in exchange for a salary or, if they do, have informal jobs. This legislation represents a point of reference in terms of rights to be addressed and funded for all the population, whether insured or not, either via the poverty reduction programs discussed below or actual reconciliation actions.

### **In synthesis**

Social security reconciliation measures are major components of a broader reconciliation policy, considering that: they are associated with the labor world; they focus on particularly critical moments of the tension between productive and (re)productive work such as pregnancy, childbirth and breastfeeding; they can be expanded to include daily care in daycare centers and care in situations such as sickness of children and other individuals requiring special care; they can contribute to the adoption of more equitable care of young

children by fathers and mothers and, even more, produce a change in gender roles and stereotypes; they affirm the idea that reproduction and care are the responsibility of society, rather than an individual matter and, finally, they are a point of reference as to the type of protection countries should promote regardless of the increasingly smaller proportion of represented by the completely formal working population.

### **Reconciliation policies linked to poverty reduction**

These policies protect rights associated with proven needs and are mainly reflected in monetary transfers (for example, for unemployed female heads of household) and services (for example, training services to promote entry into the labor market). These programs are many and very diverse in the region. This section focuses on those that can have reconciliation effects, even if that was not their original purpose<sup>1</sup>. They must be programs targeted at working women or women who want to become such. To do so, these programs basically carry out actions aimed at improving women's opportunities and conditions for entry into the labor market or providing supports related to unpaid work done by such women in their households, or both. They recognize women's role as income providers in their homes, while laying emphasis on their caregiver role through a series of requirements ("considerations") regarding health and education for their children. The main eligibility requirement is a combination of proven need and performing the caregiver-mother role, particularly in connection with children of school or preschool age. The objective defined is the reduction of poverty, particularly that of female heads of household, among whom poverty is quantitatively overdimensioned and qualitatively related to the number of women's dependants, particularly their children.

*In what moment and in response to what concerns were these measures included in the public agenda and what problem or set of problems have they sought to address?*

In Latin America and the Caribbean, these policies date back to the 1970s, but were actually implemented in the 1980s in the framework of structural adjustment programs (Lieve Daeren, 2004), with the ensuing reduction of public expenditure and an emphasis on low-income individuals, in contrast with the emphasis on universal public policies. They were promoted under the principle that the State should reduce its participation to allow the free functioning of the market (for example, in regulating employment) and focus on supporting individuals who, for some reason, do not have sufficient income to meet their basic needs. This approach, applied in all the countries in the region to a larger or lesser extent, proposes a "residual assistance" State model (Godoy in Daeren, 2004) with temporary assistance, considering individuals and families can meet their needs in the market<sup>1</sup>. The difference with employment-related programs such as those previously described is that these do not generate rights, but temporary benefits directly associated with a proven need.

*What concrete measures have been identified as part of the "menu" of solutions proposed and which of these have been implemented? Are they mainly regulations, monetary transfers or services?*

Social promotion and assistance programs are varied, often linked to government administrations, and defined on the basis of target populations such as female heads of household, unemployed persons or adolescent mothers. That is the reason why in each country we can find different coexisting programs that define their actions following different criteria and with variable periods of time.<sup>1</sup> As far as PRPs are concerned, three types of programs were selected: daycare centers, monetary transfers and other services targeted at male and female heads of household, as well as actions aimed at mothers and pregnant adolescents.

Programs found in the first group generally provide care for children under 6 or 7 (that is, the age prior to primary education). Since reconciliation involves parents' paid work, we examined transfer programs targeted at poor male and female heads of household. Finally, the empirical analysis was supplemented with a review of smaller-scale programs targeted

at mothers or pregnant adolescents and aimed at supporting them in the areas of motherhood, training and income generation.

The review was based on information available online. Because these programs are part of the same “family” and share the same “DNA” (Filgueira and Martínez, 2002), “saturation” or repetition of information between programs occurs after a certain number. For this reason, although they do not correspond to the universe of all programs, we present the main characteristics of this type of programs in Latin America. The full tabulation of the data collected is shown in Schedule 1 (Tables A1, A2 and A3).

In order to present a more global vision, Table 3 makes reference to different actions carried out or to be carried out as part of the poverty reduction strategy in the countries elected, whether they are part of the same program or several programs. The table includes a general characterization of the different actions based on the programs selected as examples. It is indicative, but not exhaustive, of the profile of actions and their effects, both intentional and unintentional, on reconciliation between paid and unpaid work.

<b>Table 3</b> <b>Latin America: Examples of measures identified in poverty reduction programs relevant to reconciliation objectives, in selected countries and programs.</b>							
Measures	Argentina <sup>1</sup>	Brazil <sup>1</sup>	Chile <sup>1</sup>	Costa Rica <sup>1</sup>	El Salvador	Mexico <sup>1</sup>	Uruguay <sup>1</sup>
Training and employment programs (support of provider role through improving monetary income)							
Training	X	X	X	X			
Monetary transfers	X	X	X	X		X	X
Incentive for hiring female heads of households	X	X					
Credit	X	X					
Childcare programs (support of caregiver role through improving social income)							
Daycare centers	X	X	X	X			
Housing programs				X			
Considerations based on caregiver role							
“Considerations” (for example, vaccination, school enrollment)	X	X	X			X	X
Comprehensive programs (simultaneous support to fulfill provider and caregiver role)							
	Not identified						

Programs do not necessarily have a national coverage

Prepared by the authors based on the following sources: United Nations Children’s Fund and Costa Rica University. 2001. Estado de los Derechos de la Niñez y la Adolescencia en CR. San José:

UNICEF; <http://www.prefecturalpz.gov.bo/pan/componentes.asp>;

<http://unpan1.un.org/intradoc/groups/public/documents/CLAD/clad0044538.pdf>; <http://www.unicef.org/co/05-c.htm>; <http://www.ministeriodesalud.go.cr/dirnutde/index.htm>; <http://www.oei.es/linea3/inicial/noesco.htm>;

<http://www.junji.cl/>; <http://www.cepis.ops-oms.org/bvsana/e/fulltext/perfiles/ecuador.pdf>;

<http://colaboracion.sld.cu/guatemala/hogares.htm>;

<http://www.presidencia.gov.ec/noticias.asp?noid=4048>; [http://www2.unesco.org/wef/countryreports/guatemala/report\\_2.html](http://www2.unesco.org/wef/countryreports/guatemala/report_2.html)

From the standpoint of the reconciliation of productive and (re)productive work, empirical evidence found suggests different elements to be taken into consideration. These elements are listed below based on the main program suggesting them.

Childcare programs provide daily care services in hours usually corresponding to the typical work shift, that is, from 8 am to 5 pm. In general:

They defamiliarize childcare, at least to some extent. Therefore, these programs are essential to reinforce national policies and strategies explicitly aimed at achieving reconciliation objectives.

One of the elements they have in common is a high level of expectation regarding the participation of mothers, families and communities, both in terms of funding and program management. Reference to working parents is sporadic and there is a tendency, for example, to take their willingness to contribute with volunteer work for granted. In part, these expectations contradict these programs' tendency to defamiliarize childcare and suggest that they also "communalize" care, like CEANIMs in Chile, CEN-CINAI in Costa Rica and CAICs in Mexico. This can be problematic in the case of very poor communities.

They are maternalistic from the standpoint that expectations in terms of participation of families and the community tend to reinforce the notion of care as a feminine responsibility, even if women are salaried workers. They also lack role-transformation objectives; instead, they rely on existing roles. From there that they capitalize on gender socialization in aspects such as women's larger responsibility of following up on school performance and children's health. This is more evident in programs targeted at heads of household, for example, where transfers are conditioned to requirements such as asking the target population (that is, female heads of household) to show they have made a "responsible use" of vaccination and school programs.

Transfers, on the other hand, are not paired with an offer of services making it easy for parents to fulfill their parental responsibilities. Programs are not coordinated with other actions carried out by other sectors of social policy (such as health or education) or productive policy (such as economic reactivation and credit).

In some cases care programs themselves include actions aimed at reinforcing women's entry into the labor market. However, in most cases emphasis is laid on women as those responsible for care. That is the case of care programs in households such as *Hogares Comunitarios de Bienestar* (Well-being Community Households") in Colombia *Hogares Comunitarios* ("Community Households") in Costa Rica, *Centros Comunitarios de Atención* ("Community Care Centers") in Chile, and *Empresas Maternales* ("Maternal Businesses") in Honduras. Of these, only that in Costa Rica refers to the creation of employment for mothers as one of the program's explicit objective.

As far as funding is concerned, these programs differ depending on whether they are funded via government public resources (PRONAICA in Brazil, HBC and FAMI in Colombia, Junji in Chile, EMMA in Honduras, CDI in Nicaragua and PDI in Ecuador); cooperation resources (PAPI in Brazil, *Nuestros Niños* in Ecuador and CDI in Nicaragua); or a combination of these resources and co-payment by the target population (PRONAICA in Brazil, CEN-CINAI in Costa Rica, EMMA in Honduras and HCB in Colombia). Co-payment systems for very poor population sectors introduce an element of commercialization of care that affects and excludes very poor mothers. The higher the co-payment, the fewer the possibilities for very poor working mothers (particularly those in a situation of critical poverty) to participate (particularly in those cases where a fixed amount, instead of a percentage of the household income, is set).

Still, to the extent they defamiliarize care, the different programs analyzed have a potential reconciliation effect susceptible of being increased. Two of these programs, *Desarrollo Infantil* ("Child Development") in Ecuador, and *Hogares Comunitarios* ("Community Households"), in Guatemala, explicitly refer to target populations of working families where children lack daily care (Ecuador), and children of working mothers during their workday (Guatemala). The difference between these two programs is relevant: one is targeted at children of working persons (parents), while the other is only targeted at children of working mothers.

In the case of Ecuador, evaluations conducted clearly show childcare centers may have a positive effect on female labor participation, although there are no studies to confirm it. In the case of Guatemala, care is clearly associated with the mothers' workday, but there are no evaluations showing the results achieved. One third program, *Empresas Maternales* ("Maternal Businesses") in Honduras, affirms that this type of services facilitates women's participation in income-generating productive activities while their children receive proper care. However, in this case, again, there are no evaluations documenting it.

One fourth program in Peru, "Wawa Wasi" differs in the sense that it seeks to provide care for children while their parents work and links care actions to proactive measures to build women's capacity to generate income of their own.

Programs targeted at male and female heads of household are aimed at providing income for poor families, rather than services, like in the case of care programs. They are characterized by:

- "Decommercializing", at least temporarily and to some extent, access to resources making up for the lack of income resulting from unemployment. Their emphasis is on building individuals' capacity to provide income to households.
- Having fewer reconciliation elements compared to childcare programs. The exceptions are those where transfers are coupled with care services, somehow integrating these programs into those previously analyzed and also into care actions at the workplace. The following are three examples:
  - In Chile the program *Mujeres Jefas de Hogar* (already concluded) provided childcare during training, but not once female heads of household entered the labor market.
  - The same applies to the program *Construyendo Oportunidades* in Costa Rica, where childcare services are limited to women's training period.
  - In Uruguay the strategy has a more maternalistic emphasis; transfers targeted at female heads of household with dependants require one hour of work less compared to male heads of household. That time, however, is not linked to actions aimed at defamiliarizing care, which reflects the expectation of childcare outside of the work schedule.

When childcare-related aspects intervene, they usually reinforce women's caregiver role, given that transfers are conditioned to meeting requirements such as vaccination or children's school attendance. These requirements, however, are not coupled with measures to improve access to services such as health and education. One example is the Program *Oportunidades* in México, which takes advantage of gender socialization to transform women into "administrators" of subsidies or assistance.

This interpretation coincides with that proposed by Daeren (2004) and based on two programs for re-entry into the labor market (the *Plan Jefes y Jefas de Hogar* ("Heads of Household Plan"), in Argentina, and the National Emergency Employment Plan, in Bolivia, which confirmed that most of the time these programs fail to incorporate childcare, while demanding proven care in aspects such as vaccination and school attendance. Thus, they assume that women will deploy one or more strategies on their own to solve it. In addition, these programs only exceptionally reach out to non-mothers and, in those cases, they do it unintentionally<sup>1</sup>. From the standpoint of reconciliation policies, this is an aspect to bear in mind, considering that a large number of non-mothers perform the role of caregivers for other individuals in the family. Programs targeted at pregnant adolescents and mothers lay emphasis on training. The reconciliation component is subsidiary to another objective (training) and focuses on childcare during such training.

*Are they sequential, derivative or responsibility reassignment policies, or a combination of the different types?*

They are derivative reconciliation policies (childcare programs) that reinforce traditional female care roles (some of the programs targeted at female heads of household promote women's more effective performance of their dual role as providers and caregivers). Social security programs are closely linked to individuals' entry into the labor market; these, on the contrary, are highly disassociated: access is intended for poor people. In addition, in many cases access to services is lost if stable employment and income exist.

Still, these programs make up a dense network of programs and, consequently, represent an unavoidable starting point to coordinate explicitly reconciliatory strategies. To do this it would be necessary to have explicit reconciliation objectives and examine different paths that, hopefully, appeal to diverse derivative reconciliation strategies (including workplaces) in addition to the creation of incentives for task reassignment in households (or at least avoiding the reinforcement of traditional female roles in households where parents are present), as well as the coordination of transfers subject to proof of adolescent and child care with better conditions in terms of access to public services, particularly social ones.

*What stakeholders have participated in shaping these policies?*

These policies have also been generated "from the top," particularly based on recommendations from international organizations and experts in the field. In general terms, they are not the result of the demands of the individuals these policies are targeted at, who lack sufficient "voice" to demand them. That lack of voice, in addition to vulnerability and income deprivation, is precisely one of the three dimensions that define poverty (Juan Diego Trejos, 2001). Incorporating this voice might allow the improvement of programs with a rights-based approach that goes beyond the predominant welfare approach. Under the latter, individuals tend to be conceived as "beneficiaries" and not as an active part of policies. The recent incorporation of individuals, families and communities into the execution of programs does not necessarily change this situation; it actually weakens the State's role before the lack of employment and tends to transfer even more responsibilities to the population lacking income-generating opportunities the most.

*What are the results achieved so far? To what extent is it possible to speak about symbolic, rhetorical or material results?*

Evaluations are scarce and, where available, have been conducted by specific programs and have evaluated actions carried out rather than results achieved. Based on available data, it would seem that, if evaluated from the standpoint of overcoming poverty, particularly in the case of programs targeted at male and female heads of household, results are mainly symbolic. In the case of daycare centers, however, it is possible to speak about material results, if not always pedagogic and in terms of learning, in the areas of nourishment and monitoring.

From a reconciliatory standpoint, one significant achievement is the possible combination of socioeconomic and gender inequity as a factor giving specificity to poverty. This is reflected, for example, in some of the programs targeted and male and female heads of household. Unfortunately, training actions are not coupled with other effective actions in the labor world. None of the programs used as examples conducted evaluations of their reconciliation results documenting, for example, if women participating in childcare programs experience better conditions upon entering the labor market. On the other hand, we did not find a discussion regarding the most appropriate indicators to use for such purposes. Since there are different types of reconciliation (sequential, derivative, etc.) a single type of program (such as childcare) can not be expected to address the tensions inherent in productive and (re)productive work. In the analysis section we address this point in more detail.

#### **4th WORLD CONFERENCE ON WOMEN PLATFORM FOR ACTION**

Strategic objective F.6 establishes the need to promote the harmonization of work and family responsibilities for women and men. To this end, it establishes some measures to be taken by governments, including:

- In the field of education, promote shared family responsibilities regarding domestic work, particularly in connection with care of children and elders;
- In the labor sphere, to ensure equal opportunities for men and women to get maternity or paternity leaves and benefits;
- In general, examine existing policies and programs to determine how to promote gender equality considering the way in which individuals divide their time between education and training, paid employment, family responsibilities, voluntary activities and other forms of work.

Source: United Nations Organization. 1995. *Platform for Action*. Beijing: UN, Fourth World Conference on Women.

### **In synthesis**

Poverty reduction programs are diverse and often change from one government administration to another, but they also make up a dense institutional, community and resource-mobilization network. Therefore, they represent an unavoidable starting point to promote PRPs. Reconciliation elements are not the rule. Still, they can be furthered without losing coherence, that is, with the general objectives of reducing poverty as their driving force. One of the things that can be done to achieve this is reinforcing care services, linking them to the labor market demands (for example, in terms of work schedules and closeness to the workplace), disassociating them from very strict poverty requirements (that end up penalizing individuals barely starting to overcome poverty) and limiting the maternalistic nature of care services and considerations (by also extending them to children's fathers). It would also be necessary to define explicit reconciliatory objectives admitting evaluations specifically targeted at assessing results achieved.

### **Reconciliation policies as such**

These policies protect rights associated with the quest for reconciliation between paid and unpaid work, regardless of whether women are formal workers or not, or live in poverty conditions or not. In addition, in their broadest definition these measures are not limited to mothers, but consider their caregiver role beyond motherhood (the case of social security measures) and care tasks related to children's education or health (the case of poverty reduction).

In what moment and in response to what concerns were these measures included in the public agenda and what problem or set of problems have they sought to address?

In Latin America and the Caribbean, these policies began being outlined after the Beijing Conference, and it was only recently that they started to become the object of public debate. In the chapter on women and the economy of the Platform for Action resulting from that Conference, one of the strategic objectives proposes a series of measures to "promote the harmonization of work and family responsibilities for women and men" (1995:97).

In addition to the above, another important precedent worth mentioning is the Convention to Eliminate All Forms of Discrimination Against Women (1979), whose article 11 states that

“States Parties shall take all appropriate measures to eliminate discrimination against women in the field of employment in order to ensure, on a basis of equality of men and women, the same rights” (1979:10). To broaden the scope of this instrument, CEDAW’s Committee<sup>85</sup> has issued recommendations, including No. 17 of 1991, urging countries to adopt measures for the measurement and quantification of unpaid domestic work by women and its recognition in the gross domestic product.

We also have Convention No. 156 of the International Labor Organization<sup>86</sup> on workers with family responsibilities, which ratifies the provisions of CEDAW and states that the problems of workers with family responsibilities are aspects related to broader issues regarding family and society that should be taken into account in national policies. However, unlike CEDAW, which has been widely ratified by Latin American and Caribbean countries, this Convention has only been ratified by Argentina, Bolivia, Chile, El Salvador, Guatemala, Peru, Uruguay and Venezuela, in addition to several countries in other continents.

**CEDAW STATES:**

“In order to prevent discrimination against women on the grounds of maternity and to ensure their right to work, States Parties shall take appropriate measures to encourage the provision of social services to enable parents to combine family obligations with the labor market responsibilities, in particular through promoting those aimed at childcare.” (Article 11)

Source: United Nations Organization. 1976. Convention to Eliminate All Forms of Discrimination Against Women. New York: UN

These international instruments have somehow contributed to starting the debate around policies to reconcile the productive and reproductive spheres. An example of this is that, although still only at a theoretical or problem definition level, reports submitted to CEDAW’s Committee and the websites of government agencies responsible for women’s advancement and the implementation of public policies clearly recognize the negative consequences of the sexual division of labor for women and how the caregiver role assigned to them is a serious limitation for their equal participation in the labor sphere.

Thus, the report submitted by Brazil to this Committee in 2002 states that women’s constant need to combine professional and family activities limits their access to work, and also that the most important aspect to bear in mind is the fact that women’s work not only depends on the market demand and their personal level of preparation to access that demand, but also has to do with factors such as their marital status, the presence of children, the composition of their family group (including the presence of old, sick or disabled persons), and female headship of household, among others. Women continue to be the ones mainly responsible for household tasks, children and the family, and perform a series of tasks that, despite being essential to the survival and well-being of individuals, are not taken into account in statistics, which simply consider them as economically active persons.

A similar report was submitted to CEDAW by Argentina in 2002. That report includes other considerations, such as the horizontal and vertical labor segmentation affecting women, as well as the lower income they receive while performing paid work. It also draws attention to a series of prejudices against women among employers in connection with the cost resulting from maternity and family responsibilities (absenteeism).

<sup>85</sup> The Committee for the Elimination of All Forms of Discrimination Against Women is the body in charge of following up on the implementation of the Convention through reports submitted by States Parties to inform of any legislative, judicial or administrative measures or any other they have taken to enforce CEDAW’s provisions (Rosalia Camacho, 2003)

<sup>86</sup> International labor conventions have the same legal category as international treaties. The ILO Constitution regulates the conditions of their design, as well as their adoption by the Conference by a two-third majority of the delegates. Once adopted by the International Labor Organization, a convention must be submitted to the competent authorities in the Member States for purposes of ratification or other appropriate measures. At the request of the Governing Body, Member States must periodically submit reports on the status of their legislation and practices in the areas covered by a convention, whether ratified or not. A convention’s ratification by a member State involves the commitment to enforce its provisions in their internal laws, and the acceptance of ILO’s relevant control mechanisms for that convention.



In this regard, Sandra Lerda and Rosalba Todaro maintain that “gender identities and images have a role as important as, or even more important than, considerations of a merely “economic” nature (1998:113). They also show, based on estimates of salary and non-salary costs resulting from a case study conducted in Chile, that the cost of working women is actually lower than that for men. In the five businesses studied in depth, the labor cost of female workers ranged between 40.4% and 86.5% of the total workers’ cost. With respect to salary costs, these were always lower for female labor. In fact, the ratio between salary costs for women and those for men ranged between 40.5% and 81.9% in the five businesses studied. This finding confirms the results of other studies in the sense that there is a persistence of lower remunerations for women compared to salaries paid to men in the labor market. Thus, it could be considered that the allegedly higher costs related to women might translate into higher non-salary costs. However, in the cases studied the authors did not find a ratio between non-salary costs for men and women in excess of 100%, except for one of the companies, where the ratio found was 118,7%. In another of the cases studied, costs associated with male and female workers were virtually equivalent, with a ratio of 100.9%, while in the other two companies, for which quantitative data was available, the ratios were 73.5% and 39.4%. (Lerda and Todaro 1998).

On the other hand, the last report submitted to CEDAW by Costa Rica in 2003 states that women’s participation in the labor market would be higher if women were able to overcome gender-based limitations. Women considered economically “inactive” often state they have not been able to work due to family and personal obligations, which is not a limitation for men, who state their limitations have to do with education.

On the United Nations side, ECLAC’s Social Panorama, the result of the rigorous and systematic work of their Women and Development Unit, states that “bringing women into the labor market and ensuring their equitable access to better and more income calls for a simultaneous social reorganization of time... [as a] social and political issue that calls for collective and public solutions which can not be divorced from economic and poverty reduction policies” (2003:154). And in their most recent report, “Roads Towards Equity” (2004) they state that “the link that defines inequality is the one between the two basic spheres of existence: public and private life... one of the most convincing explanations for the persistence of labor-market, social and political inequalities is that the changes that have taken place have not reached as far as the family sphere, so that women are paying for their autonomy in their private lives, with no help from public policy. Women are no longer confined exclusively to the domestic sphere, but they have not been relieved of responsibility for it.” (2004:15).

Also the result of international cooperation, the work done by the German Technical Cooperation Team, GTZ, and the United Nations Population Fund (UNFPA), has translated into studies like these that contribute to feeding the debate, documenting facts and basically including the topic in the public debate.

On a national level something else worth mentioning is the work done by SERNAM (the National Women’s Service). SERNAM’s action guideline on women, family and wellbeing in everyday life, which is targeted at developing policies aimed at improving the quality of life of women and their families, proposes as one of its main actions the harmonization of family and labor life (it is interesting to note that they use of this concept, and not that of “reconciliation”). As an expression of this action guideline, in 2002 they organized, along with FLACSO, a seminar entitled “Work and Family. Reconciliation, Gender Perspectives.” This seminar is really important to the extent it reflects a major effort to advance the definition of the problem and include it in the public agenda (if not in the institutional one yet, at least in that of decision-makers), and contributes to the identification of potential strategies to move in that direction. The seminar was attended by over eighty persons and included the participation of researchers and social organizations such as trade unions. (José Olavarría and Catalina Céspedes, 2002)<sup>87</sup>.

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<sup>87</sup> This organization has also conducted several studies on the subject. These include *Análisis de los costos y beneficios de implementar medidas de conciliación vida laboral y familiar en la empresa* (“Analysis of the costs

Thus, we maintain a problem exists and more work must be done to find solutions, both from the standpoints of public policies and research.

*What stakeholders have participated in shaping these policies?*

Bearing in mind this approach is still incipient, answering this question is somewhat premature. However, actually “raising” the issue with international agencies and specialists suggests that, just like the above-mentioned measures, these would also be reformulated “from the top”. However, while the first two types of measures were promoted leaving aside the concern over gender equity, these mainly stem from a gender concern. For this reason, cooperation agencies have been the ones directly involved in advocating public policies with a gender approach among feminist researchers and femocrats (that is, gender specialists in State agencies, as originally coined by Marian Sawer, 1996).

*What concrete measures have been identified as part of the “menu” of solutions proposed and which of these have been implemented? Are they mainly regulations, monetary transfers or services?*

For the time being there are no concrete measures beyond expressing the need for them. Appealing to the public policy cycle, these programs are in the phase of defining the problem and, in any event, of stating the need for solutions, which are not necessarily explicit. Public policy and gender equity specialists were consulted, and their responses revolved around the following:

- Even though the subject is really important, there is little or no information about it. The topic of the economy of care has been more explored.
- There are no government policies explicitly aimed at reconciling paid work and care. Legislative measures and social policies in the field (beyond aspects relative to parental leaves) are yet to be defined. Reconciliation policies are not part of the government language or the discourse of public officers. The debate around this issue is only limited to a small group of experts.
- The issue is highly specialized and has been barely addressed in Latin America and the Caribbean. It is a novel subject even within the feminist and women’s movement.
- The subject has no media presence.
- The subject is far more developed in Europe, including Spanish Law 39/1999 to promote the reconciliation of the family and work life of working persons. In its preamble, this law states that women’s entry into the labor market has led to social changes demanding a system including a new form of cooperation and commitment between men and women that allows for a balanced distribution of responsibilities in professional and private life through the reconciliation of work and the family.

This law “introduces legislative changes in the labor sphere to enable workers to participate in family life and maintain a balance encouraging maternity and paternity leaves without this having a negative effect on opportunities of access to employment, work conditions, and access to positions of special responsibility by women. It also makes it easier for men to join childcare from the very moment children are born or join the family.” (Law #39/1999).

*Are they sequential, derivative or responsibility reassignment policies, or a combination of the different types?*

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and benefits of implementing measures to reconcile work and family life in businesses”) (2004); and *Análisis de experiencias en empresas sobre compatibilización de vida laboral/familiar; Conciliación entre vida laboral y vida familiar de trabajadores y trabajadoras chilenos/as* (“Analysis of experiences in businesses regarding the harmonization of work and family life; Reconciliation of work and family life among Chilean workers”) (2003).

Reconciliation measures as such have the potential to incorporate both family and labor sequential, derivative and role-reformulation measures.

Current approaches vary depending on their emphasis:

- On productivity, on what the labor market and the economy in general can win if these measures are implemented. This approach mainly results in well-defined sequential measures (such as maternity leaves) and derivative measures (such as daycare centers); but not measures aimed at reassigning masculine and feminine roles (which would generate an “additional” reconciliation problem given that they would extend to the male labor force). The concern about reconciliation falls under the “umbrella” of the social responsibility of businesses. This concern results in reconciliation experiences at the level of establishments, regardless of the existence of regulatory frameworks or public services.
- On equity and justice from the standpoint of women’s rights. In the case of this approach there is a tendency to lay emphasis on measures aimed at reassigning roles, particularly in the (re)productive sphere, between men and women. One proposal that has been more or less explored is that aimed at introducing curricular changes in primary and secondary education replacing the traditional *Mi mama me mima* (“My Mom pampers me”). Because it lays emphasis on the family sphere, it is not necessarily associated with other concrete public policy measures. Another initiative we must mention is the recent legislation on responsible parenthood approved by some countries. While it is still early to affirm that they have produced cultural changes, the substantial aspect of these laws is aimed at getting men to adopt a different attitude before fatherhood, so that the burden of the responsibility does not fall exclusively on the mother and pregnancy risk is not only a women’s concern.
- On the well-being of children, given that the absence of reconciliation measures has a bigger impact on those in need of more care. This emphasis favors partnerships with sectors of society and public agencies concerned with childhood and adolescence. It also enables the construction of very simple arguments in favor of improving care conditions so that, from there, other reconciliation strategies can be promoted.

*What are the results achieved so far? To what extent is it possible to speak about symbolic, rhetorical or material results?*

They are actual reconciliation measures, but their results are still rhetorical. The main achievement here is their inclusion in the public agenda. The next challenge is that of concretizing a “reconciliation agenda”, which should coordinate measures inherent in the sphere of social security and poverty reduction under an explicitly reconciliation umbrella.

### **In synthesis**

Actual reconciliation measures provide an opportunity to start coordinating universal efforts not limiting PRPs to working or poor women; not limited to the labor market or a deficient situation in it, and not limited to derivative or sequential PRPs (that is, also including both family and labor role reassignment policies). The starting point is a set of solid legal arguments substantiated by an international legal scaffolding ratified by countries in the region. The next step is the construction of political influence agendas, hopefully with the participation of feminist and women’s organizations in the region.

### **Part III. How to move forward?**

#### **Analysis**

“The policy challenge boils down to two principal issues. Firstly, how to make parenthood compatible with a life dedicated to work and careers as well. This is usually identified as the

question of "women-friendly policy." Secondly, how to create a new and more egalitarian equilibrium between men's and women's lives – the gender equality issue." (Gosta Esping Andersen, 2002:20).

In Latin America and the Caribbean there is an incipient but growing interest in reconciliation as a problem. This interest, however, is still limited to small circles such as national women's mechanisms and cooperation agencies. What predominates are social public policies that, despite lacking explicit reconciliation objectives, have an effect on gender equity and the tension between productive work and (re)productive work and make up a dense institutional network, an unavoidable starting point to continue to move forward. Considering reconciliation policies in a broad sense and based on the findings presented in the former section, we have the following reflections.

First, it is worth asking if the term "reconciliation" is the most appropriate. In this region, it has the legal connotation of two opposing parties reaching some sort of mutually satisfactory agreement. This legal use for different purposes can generate confusion upon applying it to the reconciliation of productive and (re)productive work. The concept, on the other hand, appeals to "mending and harmonizing the states of mind of those opposed to each other" (Dictionary of the Royal Academy of the Spanish Language). It has the connotation of parties negotiating and reaching an agreement in equal conditions. With this meaning applied to the relationship between productive and (re)productive work, it can lead to a mistaken common sense, considering we are speaking of a hierarchical relationship where the logic of the labor market prevails over that of care due to structural factors, that is, related to the general organization of society. A public policy can not resolve tension, exactly in the same form equal access to elected offices does not generate political equality. On the contrary, transforming the hierarchy between care and the labor market demands deep changes, not only in the organization of care, but also in the reorganization of the labor market itself, including work processes, careers, recognition systems, etc.

Existing public "reconciliation" policies basically consist of sequential or derivative measures to provide childcare for specific periods of time. Despite their importance, these measures are far from eliminating tension or reducing the hierarchy of paid work over care work. What they can do is buffer structural conflicts and the tensions generated by the sexual division of labor and the fact that (re)productive work lacks value in the market.

Second, the menu of solutions still seems fairly limited to two types of measures: sequential measures, linked to individuals' entry into the labor market, particularly the formal one (the case of maternity leaves) and derivative measures, linked to public services (the case of daycare centers and nurseries), both of them with significant restrictions in terms of eligibility criteria (formal entry into the labor world and poverty or extreme poverty). Table 4 summarizes the main characteristics of the measures described in the former section, which in turn represent a starting point for the design of advocacy agendas to move forward in this area.

<b>Characteristics</b>	<b>Regulation of labor market</b>	<b>Poverty reduction</b>	<b>Actually reconciliatory</b>
Phase of the public policy cycle	Implementation	Implementation	Problem identification
Stability	High	Low (government programs)	--
Target population	Formal salaried female workers	Poor women, particularly female heads of household	Women in general
Main concern	Labor protection; main focus on income provision	Overcoming poverty through income; main focus on overcoming inability to generate income	Reconciliation of family and work spheres; main focus on income generation and care
Explicit objectives	Protection of motherhood through temporary and paid interruption of participation in	Reduction of female poverty resulting from precarious situation in the labor market	Address "hard" problem of gender equity considering they are at the core of the sexual

	the labor market		division of labor
Implicit objectives	(Sequential) reconciliation of biological reproduction, newborn care and paid work	Support performance of dual provider -caregiver role	Address “hard” problem of gender equity considering they are at the core of the sexual division of labor
Results	Mainly material	Mainly symbolic	Mainly rhetorical
Eligible individuals	Basically formal salaried female workers	Defined on the basis of income: indigent, poor in some cases	All women
Funding	Tripartite or business people and women workers	Cooperation, national budget and co-payment by users	Should admit a broad menu including all the options in the former two programs and others
Coverage	Relative, due to increasing informality and unregulated precarious work	Variable depending on the program	Desirably universal
Type of care the object of reconciliation	Delivery, birth and care during the first months of life	Care of young children during the workday	Desirably involving a minimum generalization of childcare (not only for children under 7, but older, for example, with homework); and a maximum broadening of the definition and the population receiving care
Main form of reconciliation sought	Sequential	Derivative	Reassignment of (family and work) roles
Evaluation	Limited; accurate information on coverage of economically active population is required	Limited; reconciliatory perspective is required	Measures still in the problem definition phase

**Source:** Prepared by the authors.

Sequential and derivative PRPs only partially address the tension between productive and (re)productive work. These policies seek to program care, particularly childcare, so it does not disrupt the organization of work. That is the reason why they focus on programmable care (such as “regular” care) as opposed to non-programmable care (such as that involved in disease or accidents). If we think of a minimum PRP agenda, it would be necessary to incorporate permits during the workday to allow workers to address the demands of children, elders or other persons incapable of looking after themselves. In general, they are women-friendly policies, but do not necessarily involve the redistribution of responsibilities between men and women, because they are mainly targeted, sometimes exclusively, at the latter. They corporatize or focalize the problem via a close link to the labor world (the case of maternity leaves) or poverty reduction (childcare in female-headed households). The close relationship with the labor market represents a problem in the framework of an accelerated regional trend to reduce formal work. The relationship with poverty reduction raises problems associated with the stigmatization of mother heads of household.

In general, there is more knowledge about aspects related to the design of programs, rather than their specific reconciliation results once they have been implemented. In order to know these results it is not only necessary to know the programs’ coverage, but also indicators on men and women’s time assigned to reproductive work, particularly among those that perform productive work. In this regard, time use surveys (TUSs) represent a step forward, even though they are not designed to evaluate public policies (in general, and not even reconciliation ones in particular). Since they started being conducted only recently, it is not possible to identify trends. It is possible, however, to know the current situation. TUSs are a tool that could be used to advance the monitoring and evaluation of public reconciliation policies.

Table 5 is a summary of the most important (but not the only) requirement to advance the different reconciliation strategies (and needs), from sequential and derivative ones to those of reorganization of families and the labor market. Some stakeholders, particularly businesses, have proposed the flexibilization of the workday on the grounds of

competitiveness (and reconciliation). However, none of the requirements leads directly to the flexibility of the workday because care demands are permanent and it would seem difficult to divide the week into days with and without performing these tasks. The need for flexibility during the workday is, on the contrary, quite clear.

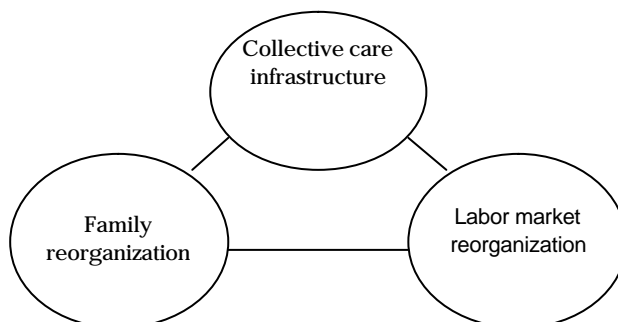
	Type of strategy (no excluding but complementary)			
	Reorganization of roles in families	Derivative	Sequential	Reorganization of labor market
Main requirement	Changes in practices involving cultural transformations (for example, by the education system) but also changes in the labor market that allow shifting from the current notion of "ideal worker" to the inclusion of care tasks as part of that definition	Care infrastructure, particularly outside the family, towards collective and solidary systems	Reinforcing labor rights allowing individuals to spend "special" time in care activities (vacations; maternity leaves; sick leaves; etc.)	More flexibility during the workday (for example, to answer telephone calls or address unexpected situations at home) effectively used by men and women while being compatible with work productivity

Third, there is an analysis and evaluation gap in terms of the costs and funding sources for the measures in question. It would seem that failure to address funding seeks to avert the macroeconomic restrictions the region is experiencing and the subsequent restriction of state functions and public services. It is necessary to consolidate and estimate the potential sources of funding, whether from social security, the national budget or businesses themselves. Since these countries present a high level of variation on each of the three measures, conditions as a whole will also be highly variable. The analysis of what exists so far suggests considering funding as an investment, and not only as an expenditure, which requires estimating requirements in terms of investment and direct and indirect savings, as well as externalities resulting from that investment, such as the prevention of school dropout rates or the lack of work and study habits.

Funding for these policies must combine public budget items, both in the fields of social security and poverty reduction, coming from businesses and the pockets of the users of these services themselves. In order to have a better idea of current and potentially available resources, it is necessary to have more accurate estimates combining social security contributions, national budget, external funding and fees or co-payments. Information on program costs is insufficient. To have better information this study should be supplemented with another exclusively focused on the costs of selected programs based on the primary information.

Graph 1 summarizes the three pillars that should be part of a reconciliation public policy agenda: family, the labor market and care infrastructure. A comprehensive vision of reconciliation demands simultaneous interventions in these three areas.

**Graph 1. Pillars of an agenda to promote policies**



As regards the family, the main idea is that of promoting the reassignment of roles so men and women can be increasingly exchangeable in all the different components of care of

individuals requiring it. This reassignment of family roles will not be able to get too far, however, if changes are not made to the “ideal worker” standard that predominates in the labor market. How many fathers can rush out of work in case their children have an emergency at school without being considered irresponsible and not dedicated to their careers? And how many mothers failing to do so are considered “evil”? The notion of the “ideal worker” must include care as a possibility, both for men and women, that can translate into a reassignment of roles, for example, for those who answer the teacher’s call or need to make an unplanned visit to the hospital, and also into a sequential reconciliation allowing the use of parental leaves without involving the end of a work career.

Finally, there is no possible reconciliation without the existence of a care infrastructure allowing for the transfer of care to other individuals and institutions. Ideally, this infrastructure should transcend the family and private paid services in order to “defamiliarize” and “decommercialize” care, at least to some extent and as an option for individuals requiring them. If this vision is correct, a PRP would involve the definition of objectives, measures, funding sources, costs and evaluation of results achieved, for each of the three pillars.

### **Final reflections**

Public reconciliation policies in Latin America and the Caribbean should be designed around three main objectives. First, to “defamiliarize” the existing tension between productive and (re)productive work; in other words, buffering strategies should not be exclusively or mainly linked to the fact that families, and women in particular, absorb a larger amount of (re)productive work. Second, to “decommercialize” service access options to support reconciliation, so that poor women are not, again, the most affected ones. Third, to promote the comprehensiveness of the different reconciliation dimensions, from the transfer and reorganization of roles in the family to the reorganization of key aspects of the labor market.

On one hand, as long as the main public policies are linked to social protection and, therefore, to salaried formal work, poor women will be excluded from these benefits. In addition, since social security does not recognize (re)productive work as work, women in middle sectors will also continue to face difficulties beyond the existence of sequential reconciliation measures. On the other hand, if the main policies are those linked to poverty reduction, services will be subject to the demonstration of lacks and, therefore, will penalize women who manage to raise above the poverty line, just like it happens with similar policies lacking incentives to overcome that condition particularly defined by insufficient income. Furthermore, these services will be segmented and stigmatized, will hardly reflect a rights-based approach and will not go beyond being a palliative of the most urgent issues.

Women in middle sectors require actions that are part of universal networks not only linked to social protection systems. Their definition should exclude unpaid work and tend to focus strongly on reconciliation upon pregnancy, childbirth and breastfeeding. Poor women, on the other hand, require actions that do not depend on their income level or their access to formal jobs. These women should hopefully “find themselves” in some of the reconciliation measures implemented by the State. They would represent options promoting partnerships between women and middle, middle-low and low-income families. In other words, it is necessary to design and further reconciliation policies women and families from different socioeconomic levels can resort to. Beyond the fact of women converging on the basis of similar interests in the pursuit and implementation of solutions, any proposal in this regard should lay emphasis on the reorganization of roles to promote male participation in all aspects related to (re)productive work.

Promoting universal policies may seem impossible in a region experiencing unheard-of degrees of social and economic segregation, even in countries with histories of high relative integration such as Costa Rica and Uruguay (O’Donnell, 1999). A unit is required to access the different services constituting intersections between men, women and families of different socioeconomic strata. That is the case of businesses or establishments, as currently

provided for by legislation on daycare centers and nurseries, as well as the combination of place of residence and work. In this regard, one of the aspects that must be taken into account with regard to measures on establishments and the labor market is the possibility of “bringing” care to the workplace, regardless of whether workers are male or female, so that progress can be made in the recognition and assessment of (re)productive work, as well as the reconceptualization of the ideal worker notion predominating in the labor market.

Support services should enable access by both men and women so that “male” behavior can be related to dependant care. More specifically, day care centers, which are currently associated with the number of female workers, should be extended to male workers with young children. There have been claims for the number of women not to be calculated by establishment, but by groups of establishments, but not necessarily so that the individuals eligible as beneficiaries are also men. The latter would reduce the undesired effect on the hiring of women and would create an incentive so that men are also responsible for the logistics associated with transportation of children, in addition to encouraging the exchange of roles to facilitate, for example, closer bonds between men and their children, something often limited by socialization processes.

Finally, the problem and its possible solutions must be submitted to the consideration of different political and economic stakeholders. One of the possibilities to this end is to take advantage of windows of opportunity opened by different public policy reforms (such as those related to pensions or labor reforms), and also to promote a debate around reconciliation “in its own right”. These leaps would require bringing to the table a series of concerns around the subject, from those related to productivity and competitiveness, to those related to advocacy of rights, including approaches seeking to bring equity in the care of individuals to the center of the strategy.

In fact, the main challenge in advancing universal reconciliation policies has to do precisely with the stakeholders promoting them. For cooperation agencies and national women’s promotion mechanisms, it is unavoidable to lay emphasis on measures that fail to confront or question the leading role of the logic of the labor market vs. the logic of care. This reflects what we call an “ethics of responsibility”. It would be necessary to have a stakeholder countering this ethics with an “ethics of transgression” demanding the adaptation of the logic of care from the labor market. This combination of approaches could lead to a better balance of forces to reach agreements with other stakeholders that must start by understanding and recognizing that reconciliation is a problem that must be the object of public policy.

One of the main obstacles to the presence of stakeholders demanding effective reconciliation policies “from the bottom” is the weakness of coalitions of women from different social classes with respect to this issue. While demands such as political participation tend to unite women from different socioeconomic strata and, therefore, lead to the convergence of different “voices” and power resources, care and reproduction don’t. This is obvious: even if none of them succeeds in resolving or eliminating sexual division of labor from their lives, reconciliation strategies available to women vary a lot depending on their socioeconomic condition. Commercialization and “refamiliarization” options simply manage to “get out of the jam,” and postpone the demand for a more collective and social response, not to mention the fact that, over the course of the last two decades, organized women in Latin America and the Caribbean have laid more emphasis on their incorporation into public life than on repositioning the private one (Sonia Álvarez et al, 2002).

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