

# The Crisis of Care, International Migration and the Capabilities Approach: Implications for Policy

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# **The Crisis of Care, International Migration and the Capabilities Approach: Implications for Policy<sup>1</sup>**

by

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## **Abstract**

Focusing on what in Europe has come to be called “reconciliation policies” –or policies to balance family and labor market work—this paper poses the question of whether some of the legislative efforts introduced in Europe during the past decade can be applied to Latin American countries. The paper argues that there are differences between Northern and Southern countries in this respect, and it focuses mostly on two of them –the extent of the informal economy and international migration—which make this application difficult. Using the capabilities approach framework, the paper outlines other lines of action for public policy that can be useful to design reconciliation policies for the South. Finally, the paper argues that this type of policies represents an urgent issue whose time has come in order to rethink gender equity within the emerging new gender order across countries.

## **About the Author**

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## Introduction

Much has happened since feminist theory in the 1970s pointed out the importance of distinguishing between productive and reproductive work, and between production and the different meanings of reproduction. The main objective of this effort was to underline the invisibility of women's work in the sphere of reproduction and to emphasize its importance for welfare provision and the functioning of the economic system. A second objective was to understand the connections between women's concentration in reproductive work, their participation in the paid labor force, and the conditions under which this participation takes place. Finally, the analysis was important for the effort of estimating the totality of women's work and the contribution of unpaid work to GNP (Himmelweit and Mohun 1977; Benería 1979). Over the years, and as women's labor force participation has increased very substantially across countries, these distinctions remain important, but the boundaries around which productive and reproductive activities are located have changed, particularly with their shift from the household to the market. Thus, a growing proportion of care work has been marketized, even though much is still performed within the household, either as unpaid work by family members or as paid activities.

These transformations have intensified the problems, for women in particular, of balancing family and labor market work. At the same time, globalization and neoliberal policies of the past quarter century have eroded the foundations that had contributed to the construction of welfare states in many countries, particularly the notion that the state had a strong role to play in the provision of welfare and social protection. In high income countries where the welfare state had been the most developed, privatization and the diminished role of the state in these areas have represented a sharp reversal of previous trends. The neoliberal order has tended to privatize individual and family survival, de-emphasizing and de-universalizing social protection. Even though the specific forms and circumstances differ substantially across countries and regions, this is the case in the North as well as in the South where the welfare state was less developed. In low income countries, issues of social reproduction have led to new directions in the privatization of survival, such as represented by the feminization of international migration, as argued below. As Bakker (2003) has noted, "national states are increasingly locked into constitution-like regulations and structures that limit their capacity either to rehabilitate failed markets, stabilize business cycles or protect citizens from the worse abuses of capitalism" (p. 60).

The main focus of this paper has to do with legislative efforts to balance or reconcile household activities and market work. This issue has become a matter of intense public debates in many countries in the North, such as in the European Union since the late 1990s. This is because "the crisis of care" has intensified as women have increasingly moved into the paid labor force and as demographic trends have resulted in very low fertility rates and very high life expectancy in most countries, with the corresponding aging populations and pressures on social security systems. The provision of day care and other social services facilitating women's incorporation in paid labor have become increasingly more important, and the same can be said for legislation regulating parental and other care-related leaves from work. In the South, these legislative efforts have appeared to be less urgent, mostly because the middle and upper classes, i.e., those who tend to exercise most influence on public debates and legislative initiatives, have

these pressures cushioned by their access to domestic service; the need to balance household and market work is mediated by the still abundant supply of mostly women willing to work for the very low wages and precarious working conditions prevailing for this type of work in many countries. However, at least in Latin America, the debates have begun. To the extent that developing countries will grow and generate new sources of employment for women, increased female participation in the paid labor market is likely to increase the pressures felt by families to deal with care work. Women's roles have been changing, often quite deeply, and, in the process, men's have also been transformed. Even though many questions remain about the extent and significance of these transformations from a gender perspective, they provide the background for rethinking social policies with regard to "reconciliation policies," as the legislation aimed at balancing family and labor market work tend to be called in Europe.

Likewise, and for similar reasons, the gender order is changing rapidly in developing countries. The tremendous increase in women's participation in the labor market and the many transformation in gender roles in the area of production have not be accompanied with corresponding changes in the area of reproduction and care work (Benería and Floro 2006). To be sure, many countries have introduced some type of policy to facilitate women's incorporation in the labor force, but the time has come to design more systematic ways to deal with the pressures generated by the crisis of care and the enormous changes introduced by these transformations.

Focusing mostly on high income countries, Nancy Fraser (1997) has emphasized the need to rethink our notions of gender equity as "the crumbling of the old gender order," centered around the weakening of the family wage model, continues This has been due not only to the insufficiency of the male wage for family survival and the parallel increase in women's employment in most countries but also to changing family structures and new household arrangements. With the purpose of thinking through the new policies that can help build gender equity under these circumstances, Fraser distinguishes between two visions/models for postindustrial societies. The "universal breadwinner model" aims at achieving equity through women's employment and parity with men whereas the "caregiver-parity model" relies on the support of informal care work and on forms of employment for women that do not necessarily imply parity with men, such as part time employment; in this case, the objective is "to make difference costless." Under the first model, care and reproductive work are shifted to the market and the state whereas, under the second, it is kept within the household, with support from public funds. To some extent, both models are in fact at work in many countries although in various degrees and far from approaching what Fraser calls a "universal caregiver state" which would also include sharing care work between women and men. The objective, in Fraser's words is to construct

...a social world in which citizens' 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 (p. 62).

Although neither model is likely to be fully realized in a world dominated by neoliberal policies, the time has come to press the discussion of how to achieve gender equity within the

emerging gender order. This discussion is of course well under way, even if the final objectives might not necessarily be identical. For example, the social policy discourse being promoted by the OECD has clearly shifted from a neoliberal agenda to a more interventionist model resulting from what has been termed “inclusive liberalism” aimed at mitigating the adverse effects of capitalist development under uncontrolled markets (Craig and Porter 2004; Mahon 2007). Although not re-embracing the ideas of a Keynesian model, “inclusive liberalism” has gradually developed since the 1990s to emphasize the need to support “the development and use of human and social capital.” The objective is not to reintroduce the Keynesian state but to emphasize the central role of employment and the need to “remove barriers to work and reinforce the work ethic.” In this sense, public support for childcare and other policies to reconcile family and labor market work can promote employment and increase productivity. We might argue that this is a very functionalist argument that has little to do with the pursue of gender equity but it would not be totally accurate since one of the arguments also used is that “staying in the labor force is one way that mothers can protect themselves and their children against the vicissitudes of relationships and work” (OECD 2005, quoted in Mahon 2007). Yet, although this discourse falls short of approaching the objectives of Fraser’s model, it opens some doors for feminist agendas of gender equity.

This paper argues that the policies needed at present in Southern countries for balancing different types of work may be different from those designed in the North. In particular two main differences are analyzed. The first has to do with the extent and significance of the informal economy. Although labor market informalization has intensified across countries as a result of neoliberal policies and the effects of globalization, in the South the informal economy absorbs a much higher proportion of the working population. This has implications for the needs of households and the ways to reconcile family and market work. The second difference relates to the feminization of international migration which, especially since the 1990s, has contributed to the globalization of care and of social reproduction. Women’s migration from the South to the North in large numbers, including mothers leaving their families behind, has been meeting the demand for care labor in Northern countries. This process has affected the ways in which migrant in the South and their households organize themselves, including the formation of transnational families who have to solve their own care needs. The paper analyzes these differences and provides a theoretical framework for linking reconciliation policies with the human development or capabilities approach, identifying policies that can expand individual capabilities, particularly women’s, through balancing family and market work. The background of this analysis refers especially but not exclusively to the case of Latin American countries such as Bolivia and Ecuador, with an important emigrant population that has become increasingly female.

### **Reconciling Family and Labor Market Work: North/South Differences**

A good deal of the legislative efforts to balance household and market work in the North have tended to focus on employing institutions as the channels through which these measures are implemented. To illustrate, Spain’s 1999 “Law To Promote the Reconciliation Between Family and Working Life” regulates maternity and paternity leaves, as well as work leaves and reductions in hours of work to facilitate not only the care of biological and adopted children but also the care (and attending to the death) of kin family members. For this purpose, the law

mandates paid or unpaid leaves with the assumption that workers can return to their jobs within a given period. The different forms of temporary leaves and permissions to facilitate care work are to be negotiated through the firm or the worker's employing institution. Similarly, the law regulates reductions in social security payments for the employing institution granting these permissions to both men and women. This is done with the purpose of preventing discriminatory treatment of women workers, in particular its negative effects on female employment if it is assumed that women are more likely than men to ask for maternity leaves or other care-related leaves from work.

The objective behind this type of legislation is twofold. First, it aims at facilitating women's incorporation in the paid labor force and, second, it promotes equality of treatment between men and women workers. By legislating parental permits on an equal basis between men and women, it meets the need to end discriminatory practices that hurt women as the primary care-providers. It also responds to the calls for promoting gender equality, not only from women in general and women's groups in particular but also from a variety of international institutions. The Spanish law for example mentions specifically the recommendations from the 1995 Beijing Platform of Action agreed upon at the Fourth UN Conference on Women; and it refers to the directives given by the Council of Europe and the recommendations from UNICEF and other international organizations regarding the need to grant parental leaves. In addition to this type of legislation, the debates on reconciliation measures have centered around other basic policies facilitating women's incorporation into the paid labor force. These include the provision of day care and other public services addressing family needs, as well as the flexibilization of working hours and commercial schedules in order to facilitate combining employment and domestic responsibilities.

It should be pointed out that other European countries have developed their own responses to the need of balancing family and market work. A report published by the European Commission comparing policies across thirty countries found that they differ considerably, "with every country having its unique constellation of childcare services, leave facilities, flexible working-time arrangements, and financial allowances" (EGGSIE 2005: 5). Returning to the case of Spain, a more comprehensive and pioneer type of legislation than the 1999 law regarding care needs was passed in 2006, to begin implementation in January 2007.<sup>2</sup> It provides state support for different types of care --funding a proportion of the expenses on care to be complemented by households according to income. This type of legislation responds to a vision of universal access to public funds for the provision of care and it represents a positive step towards the promotion of collective efforts, much in contrast to the privatization of care that has predominated under neoliberal policies.

To be sure, it is too early to evaluate the extent to which these types of legislation will be successfully implemented. My question here is whether these efforts are appropriate for the developing world and, more specifically, for countries such as those that characterize many Latin American economies. Although in general this legislation might be appropriate, there are three main differences between the North and the South that must be taken into consideration in answering this question. The first is that the availability of inexpensive domestic service

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<sup>2</sup> I am referring to the "Ley de Dependencia Universal" (law of "universal dependency") introduced on March 5, 2006, by the Socialist government and approved on November 30<sup>th</sup>.

functions as a cushion that diminishes family tensions around unpaid work. Although this privilege is available only to the middle and upper classes, they are precisely those most likely to contribute to the debates and to introduce legislation. Perhaps for this reason, the debates around policies of reconciliation have not surfaced with the same intensity as in Europe, probably because they seem less urgent than in the Northern countries, although the debate has emerged already and is growing.<sup>3</sup> The second difference has to do with the extent and nature of the informal economy, and the third relates to the phenomenon of South-North migration and particularly to the feminization of migration. In what follows, I examine the last two in more detail.

#### *a. The Informal Economy*

Much has been written about the ways in which, during almost three decades, globalization and neoliberal policies have contributed to labor market informalization, both in the North and the South but with many differences between the two sets of countries. The tremendous growth of the informal economy during this period has resulted in a continuous weakening of the links with formal firms and institutions for the largest proportion of the labor force. The shift of employment to more informalized jobs has resulted, first, from the variety of policies introduced through structural adjustment programs –from budget cuts to privatization programs aimed at reducing the scope of the state, and from deregulation of markets to the opening of national economies to global competition and foreign investment. Second and parallel to the first, increasing global competition resulting from globalization and global restructuring has resulted in a deterioration of the relative bargaining power of unskilled labor. Transnational production has provided multiple channels to shift investment towards more informalized, precarious, exploitative and unprotected forms of employment. In developing countries, references to the informal “sector” prevailing in the initial 1970s formulations have been replaced by an analysis of the informal “economy” --given the magnitude of the affected population. In the Latin American region, about half of the working population on average is engaged in informal activities, with higher proportions for the Andean and Central American countries. In Bolivia for example it has reached over 65% of the working population, the highest proportion in the Andean countries (Benería and Floro 2006). The literature has shown the ways in which the informal economy and its accompanying processes of unemployment, underemployment and social exclusion have been linked to the persistence of poverty in many countries (Portes and Castells 1989, World Bank 2000/01; Benería 2003; ILO 2004; Pérez-Sáinz, 2006).

An extensive literature also exists on the extent and nature of informal activities, characterized by their precarious and unstable working conditions, lack of regulation, and unprotected labor. A good proportion of informal labor is engaged in precarious subsistence activities through which individuals and households manage their survival strategies, as in the case of street vending. However, the informal economy also includes multiple forms of labor engaged in wage labor and self-employment. The processes of informalization that have taken place under globalization and neoliberal policies have resulted in a continuous blurring of the

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<sup>3</sup> UNFPA for example organized a pioneer effort to discuss reconciliation policies at a gathering in Mexico City in October 2005. The meeting had participants from different countries and the work is continuing in different directions (see Mora et al, eds., 2006). I return to this topic in the last section of the paper.

formal/informal divide, for example through subcontracting and outsourcing. The degree of fluidity between formal and informal activities and between different types of work can be very high; for workers, it often includes temporary migration within and between countries, symbolized by what Garcia- Linera (1999) has referred to as the contemporary “nomad worker.” Thus the informal economies of the South are characterized not only by a high degree of fluidity between jobs that include formal/informal activities but also by a high level of heterogeneity. This results in different degrees of precariousness, income levels, instability, insecurity and vulnerability. To illustrate, in a study of poor urban households in Bolivia and Ecuador, Benería and Floro (2006) distinguished between three “degrees of informality” in order to best understand this variations in fluidity, vulnerability and heterogeneity as well as in labor market insertions and labor conditions. For women in particular, the shifts between different jobs and tasks is also associated with their involvement in domestic work and care responsibilities. For them, the care of children is often not separated from other activities, with important consequences for balancing family and market work.

Under these circumstances, reconciliation policies can hardly be designed as to be implemented through the workplace since formal and secure work involves only a small proportion of the population. For most workers, there is no fixed workplace, and the most stable working reference is the household. In addition, policies aimed at increasing labor market flexibilization are not very relevant given that the informal economy is highly flexible. This implies that policies to balance different types of work should be designed around the household as the center of people’s life and work, such as with the availability of neighborhood day care (as opposed to day care at the firm’s or other institutional levels), access to local schools for all children, and measures to save time in domestic and care activities. This is of course particularly relevant for women, and it can include a large variety of measures such as increasing access to neighborhood health centers, the availability of community services such as sports facilities and centers for the aged, improvements in public transportation, paved streets that make it easier for people to move about, greater access to telephones, and others. Most importantly, these measures should aim at saving time for household members, especially women who tend to have the greatest need to reconcile different types of work. We will return to this subject below.

### *b. The Globalization of Care and Social Reproduction*

The feminization of international migration has been on the increase in Latin America particularly since the 1990s. In recent years, the proportion of women migrating to some European countries has represented more than 50% in many cases and it has reached levels as high as 70% (Dominican migration to Spain or Brazilian migration to Portugal) and 60% (Bolivian, Colombian and Peruvian migration to Spain) (Herrera 2005). For these countries, the difference with previous migration flows is their shift to Western European countries, Spain in particular, as their major destination. Similarly to the case of the Philippines from at least a decade earlier to the present, it has resulted from the combination of well known factors. First, the crisis of care in the European countries –due to the increase in women’s labor force participation rates, the aging of the population resulting from the fall in fertility rates together with the increase in life expectancy, and further “nuclearization” of the family—has been partially met with foreign labor, particularly with women from Latin America. Southern

European countries in particular have been meeting the deficiencies in public services care provision with foreign labor hired by individual households. Thus, immigrants provide the help needed for middle class European women and men to participate in the paid labor force. On the one hand, their contribution involves the tasks of social reproduction, such as the care of children, domestic work and other family-related chores. On the other hand, they contribute to the care of the elderly as higher participation in paid work by all family members makes it more difficult to care for them.<sup>4</sup> For these reasons, immigrant women find jobs more easily than men, at relatively low wages for the receiving country but high enough to provide an incentive to migrate.

On the supply side, growing inequalities between countries not only provide an economic incentive to migrate; they are part of the sense of insecurity, vulnerability and instability resulting from economic crises, poverty and unemployment prevailing in developing countries. For women, there are also gender-related factors behind their decision to migrate, such as the wish to leave abusive relationships, family conflicts, and different forms of gender discrimination (Camacho and Hernández 2002; Herrera, 2005). A variety of studies have shown that many emigrant women have children and leave their families behind, either assuming that the family will follow them eventually or that they will engage in some form of “international mothering.” As in the case of the Philippines, the export of women’s labor generates a “depletion of care resources” affecting their ability to provide care for the family left behind (Parreñas 2005); households have to negotiate who will be responsible for domestic chores and for the children and other family members once female migrants have left. This continuous negotiation includes men’s involvement in the process and the extent of transnational mothering. In any case, it is obvious that there are hidden costs of migration that are not easily captured by economic estimates; they include not only those involved with the dislocation of families and communities but also psychological costs that are very difficult to measure. These costs are hardly taken into consideration by those who hail the wonders of the market and of globalization to deal with social problems.

The corresponding formation of transnational families that we have witnessed in recent times implies not only a significant shift in gender relations; it is part of the new “gender order” associated with globalization and pointed out by different authors (Bakker and Gill, eds. 2003). Women’s roles experience contradictory changes. On the one hand, there are role *reversals*, symbolized by their decision to migrate and find employment abroad before men do; likewise, their new role in family maintenance takes place through the remittances sent. Both represent an increase in women’s individual and financial autonomy which can contribute to a process of “undoing gender” (Benería 2006).<sup>5</sup> On the other hand, the prevalence and intensity of transnational mothering also implies a *continuity* of women’s traditional roles; although subject to changes in time and space, there is evidence that emigrant women’s care of their children does not stop when they physically leave them (Festermaker and West 2002; Salazar Parreñas 2005).

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<sup>4</sup> Herrera (2005) reports that nine out of ten Ecuadorian women immigrants in Spain are engaged in domestic work. The proportion is even higher in the case of those without legal papers.

<sup>5</sup> The shift probably implies an increase in women’s bargaining power within their families and communities. Although there are indications that this is the case, I am not aware of any study focusing on this issue in any detail.

In her study of children growing up in homes of migrant mothers in the case of the Philippines, Salazar Parreñas illustrates the extent to which the experience of children is different in mother-away vs. father-away households. In the first case, children feel not only deprived of mother's presence and love; her absence is socially more difficult to accept for them than that of the father because it goes against conventional social norms and traditional gender roles. Likewise, Herrera (2005) makes reference to an Ecuadorian mother who is saddened by the fact that her children are resentful of her absence and have not understood her decision to leave. These examples speak of *tensions* between role reversals and continuities. Parreñas for example claims that the ideology of women's domesticity remains quite intact in the Philippines, yet the described role reversals are likely to work in the opposite direction, generating corresponding tensions as well as transforming gender roles and gender relations.

Arlie Hochschild (2002) has referred to the extraction of care resources from the South by the North as "emotional imperialism," and she has compared it to nineteenth century imperialism's extraction of material resources. This extraction, she argues, is not done by force or through colonial structures; it is the result of choices that result from economic pressures constituting a different form of coercion. To be sure, growing North-South inequalities and the problems of development in the South are at the root of these decisions. However, the problem is more complex and the comparison with nineteenth century imperialism interesting but not totally warranted; rather than being linked to an institutionalized form of Northern colonialism, the extraction of care resources is the result of decisions taken by individual households responding to the crisis of care. Thus, the solution is to be sought not only in the reversal of North-South inequality trends and the systematic improvement of economic conditions in the South; it also depends on the shift of policies in the North towards the provision of social services that can meet the care needs of individual households.<sup>6</sup> This implies a new turn in policy towards more collective approaches to social provisioning and a shift away from the dictates of neoliberal regimes. In this sense, charges of emotional imperialism might tend to intensify North-South tensions rather than to illuminate the fact that they share the need to counter the consequences of neoliberal policies.

As for the significance of female migration for reconciliation policies, these processes have significant impacts both in the South and the North. In the receiving countries, the employment of immigrant women represents an individual household's solution to the needs of balancing family and labor market work. To the extent that many households recur to similar solutions, it contributes to the privatization of social reproduction prevailing under global neoliberalism. This solution is open to families that can afford the corresponding costs but leaves lower income households without solving the problems of balancing their time tensions. In this way, it might tend to decrease social pressures to find collective solutions to the crisis of care, but it contributes to the vicious circle through which private solutions might delay collective efforts through public policies. In the South, the need to balance family and labor market work shifts from the women who migrate to the individuals who replace them. In the case of mothers leaving their children behind, studies show that it's mostly women who replace them, even in

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<sup>6</sup> In addition, part of the solution depends on achieving a higher degree of equality in the gender division of labor within households.

cases when fathers assume responsibility, and this includes especially close relatives or female extended kin (Herrera 2004; Salazar Parreñas 2005). Yet, in the absence of a clear pattern regarding who takes up the tasks of the absent mother or daughter, it is difficult to identify those who can benefit from any type of reconciliation policy. However, policies that save time to household members, as mentioned above, are likely to help those who take up the task of replacing those who migrate.

### **The Capabilities Approach and Reconciliation Policies**

The theoretical framework provided by the capabilities approach provides a useful avenue to think through policies to balance family and labor market work. Reconciliation policies can be viewed as a way of expanding the capabilities of those who benefit from them, particularly women. The notion of capabilities is understood here as defined initially by A. Sen (1985) and elaborated by M. Nussbaum (2000), Robeyns (2003 and 2004) and others. Linked to the concept of human development, they represent ways to expand the multi-dimensional potential and functionings of individuals, affecting each and everyone to be and to do. Sen distinguishes between “capabilities” and “functionings” in the sense that they represent a distinction between what is possible and desired on the one hand and what is actually realized on the other. For Sen, the “primary feature of a person’s wellbeing is the functioning vector that he or she achieves” (Sen 1985: 198). While a capability is “the ability to achieve,” a functioning is an actual achievement; the first “connotes a sort of possibility or opportunity for functioning” (Crocker 1985: 162). Thus, capabilities can be linked to the removal of obstacles in people’s lives so that “they have more freedom to live the kind of life which, upon reflection, they find valuable” (Robeyns 2004, p. 2). For Sen and Nussbaum, “development is the promotion and expansion of valuable capabilities” (Crocker 1985: 157)).

The approach is particularly relevant for women since, depending on the extent of gender discrimination and patriarchal norms, conventional measures of development can be very inappropriate to evaluate their wellbeing. Economic growth and family income for example may not benefit them to the same extent as male family members. Hence, a focus on capabilities rather than income can reveal more specifically the different dimensions that can contribute to women’s wellbeing. As Nussbaum argues, a further advantage of this approach is that it can address gender inequalities in resources and opportunities within the family.

It has been pointed out that, in many ways, the notion of capabilities is similar to that of human rights. However, as Nussbaum (2003) has observed, “the language of capabilities gives important precision and supplementation to the language of rights” (p. 37). Thus, desired capabilities might differ according to specific circumstances related to socio-economic conditions and cultural factors. Unlike rights, which have been criticized for having a Western bias, the notion of what people are able to be and to do might call for very specific goals and it can differ across the social spectrum and across countries and regions. Along these lines, some authors have developed a list of capabilities beyond Sen’s more general approach. In fact, Sen does not endorse the notion of elaborating specific lists since he assumes this is the task of public debates within a democratic system. The lists can be used to design indicators of wellbeing or quality-of-life and for the purpose of setting social goals and design policy. Nussbaum for instance has developed a list of ten capabilities that she sees as “central” and which range from

“life” (“being able to live to end of human life of normal length...”). “bodily health” (“being able to have a good health...”) to “bodily integrity” (“being able to move freely from place to place...and to be secure against violent assault...”), and others such as “control over one’s environment” which includes political participation as well as control over material aspects of people’s lives such as being able to hold property (Nussbaum 2003:41-42). She views this list as being universally valid despite her claim that capabilities are more specific and hence more locally adaptable than human rights.

A different question is how to move from a list of capabilities to the realm of policy and practical action, which is my concern in this paper, in such a way that capabilities can become functionings for each and everyone. This implies some evaluation of what is most urgent for a good life; Nussbaum’s list of capabilities is a useful attempt to do so but it is still too general to specify some policies such as those helping reconcile paid and unpaid work. For this purpose, I have used a different list of 14 capabilities compiled by Robeyns (2003) for an evaluation of gender inequality in Western societies.<sup>7</sup> One of the differences between Nussbaum’s and Robeyn’s lists is that the latter includes capabilities having to do with gender inequalities in time allocation, leisure-time, and time-related stress which she considers are an important social issue in some Western societies. Five among them seem particularly relevant for the ability to reconcile different types of work and are listed in Table 1: 1) being able to raise children and to take care of others, 2) being able to work in the labor market or to undertake other projects, 3) being able to be mobile, 4) being able to engage in leisure activities, and 5) being able to exercise autonomy in allocating one’s time.

Robeyns arrived at her list following several steps that included brainstorming sessions, the testing of a draft list by engaging with existing literature on the topic and comparing it with other lists, and debating the list with different groups representing different spheres of life. Thus, her methodology incorporated the expressed needs and local views of people specific to Western societies. However, some of these capabilities seem relevant to all societies whereas others apply to some contexts more than others. For example, #1 and #2 can be considered relevant rather universally whereas #3 applies to different societies in various degrees; even though women’s mobility tends to be lower than men across countries,<sup>8</sup> this capability can be especially relevant in areas with restrictive social norms limiting women’s mobility such as with seclusion and various forms of gender segregation. Likewise, #4 and #5 are particularly relevant for women; even though there can be differences across countries and social groups, available information on time distribution shows that men enjoy longer hours of leisure than women do; in fact many studies indicate that, particularly poor women, have no leisure at all (Carrasco et al, 2004; Andia Falgade 2006).<sup>9</sup> In addition, gender norms and work roles prevailing in most societies assign women many responsibilities, such as domestic work and family care, in such a way that the degree of autonomy in allocating their time is very low, particularly time dedicated to leisure activities.

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<sup>7</sup> More specifically, Robeyns’ work is centered in Western Europe.

<sup>8</sup> Most studies of mobility and use of transportation for example show that women tend to move within distances closer to the household than whereas men tend to travel longer distances (Alcántara de Vasconcellos, 2003).

<sup>9</sup> In a seminar I gave in La Paz, Bolivia, in which this set of capabilities was discussed, a participant who had conducted research among poor, mostly indigenous, women in the city of El Alto, pointed out that most poor women did not have any leisure time. In fact, when asked what would they do if they had an hour of leisure a day, some of them responded that they would use it to do more paid work in order to raise their household income.

**Table 1: Capabilities and Public Policy**

| CAPABILITIES   | Neighborhood day care centers | Access to schools | Access to health centers | Community services | Public and private transportation | Access to telephone | Family subsidies | Paved & secure streets, etc. | Access to water, laundry, etc. |
|--|-------------------------------|-------------------|--------------------------|--------------------|-----------------------------------|---------------------|------------------|------------------------------|--------------------------------|
| 1. Being able to raise children & to take care of others     | ++                            | +                 | +++                      | +                  | +                                 | +                   | ++               | +                            | ++                             |
| 2. Being able to work in the labor market and other projects | +++                           | +++               | ++                       | +                  | +                                 | ++                  | ++               | +                            | +                              |
| 3. Being able to be mobile                                   | +                             | ++                | +                        | +                  | ++                                | +                   | Depending on use | ++                           | +                              |
| 4. Being able to engage in leisure activities                | ++                            | ++                | ++                       | +++                | ++                                | +                   | +                | +                            | ++                             |
| 5. Being able to exercise autonomy in allocating one's time  | +++                           | +++               | ++                       | ++                 | +                                 | +                   | +                | +                            | ++                             |

In each case, expanding these capabilities would ease the problems of balancing different types of work. Table 1 also includes a list of public policies that can be instrumental to expand the set of capabilities open to men and women and their households but with special relevancy for women. The positive signs and their number indicate the type of correlations assumed, except in the case of family subsidies whose effects on “being able to be mobile” are likely to depend on how the subsidies are used.<sup>10</sup> Following Robeyns’ methodology, I have discussed the list of capabilities and policies included in Table 1 with different groups and people while doing fieldwork in Bolivia. The various discussions took place at different levels such as within at a seminar or a lecture on the topic and in informal meetings, with groups representing different constituencies and ranging from academics and researchers to activists and policy makers. Some of the researchers were very familiar with the needs of poorer households and had focused in particular on the lives of poor women. Although there were no basic disagreements regarding the capabilities and policies listed in Table 1, interesting comments and suggestions were made. For example, the column “access to water, laundry, etc.” as well as “private transport” (in addition to “public transport”) were added after one of these discussions. Some participants suggested “being able to bargain at different levels” (i.e., in the household, community, the state, etc.) and “being able to develop self-esteem” as important capabilities helping them to negotiate with policy makers, especially for poor for women; they are not included in the list since their connection with the policies listed can only be traced indirectly.

As for the list of policies included in Table 1, it should be noted that they are compatible with the assumption, as argued above, that the household is the most stable place for those engaged in informal activities.<sup>11</sup> Each policy is likely to save time for household members but particularly for women, thus helping ease the pressure of balancing different types of work. Since they do not need to be implemented through a site of formal employment, these policies are appropriate for meeting the needs of those associated predominantly with the informal economy. They can be designed at the national or municipal level although some of them are more appropriate for intervention at the local level, such as “community services” and “access to water, laundries, etc.” As will be discussed in Section IV, they require the type of commitment and funding associated with a collective approach to social reproduction –which runs counter to the tendency to privatize that has been promoted through neoliberal policies during the past two decades.

This framework provides some avenues for action regarding specific types of funding. One example is the case of remittances sent home by transnational migrants. The tremendous increase in their importance as an inflow of foreign currency has surpassed foreign aid in many countries. For Latin America and the Caribbean, the total amount reached the astonishing amount of \$25 billion in 2002 and has continued to grow (Sander 2003). Most studies and anecdotal evidence show that the bulk of remittances is used for consumption as well as for education, health, improved nutrition, loan payments, and travel. There is also evidence showing

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<sup>10</sup> For example, subsidy targeted to increase food available for family consumption is not likely to increase women’s mobility whereas the effect would be positive if it’s used to increase children’s school attendance.

<sup>11</sup> It should also be noted that the table does not include a column for “parental leaves” and “care leaves” because these policies tend to be linked to formal jobs while those in Table 1 are meant to benefit informal workers as well. Yet, when mentioned, there was much agreement about the primary importance of these leaves for working women.

that they are used for land investments and for building or improving a home. In the Andean countries, anecdotal evidence also suggests that, in some cases at least, there is a tendency towards conspicuous consumption and expenditures associated with an increase in social status. This is why the arguments emphasizing the use of remittances for more productive purposes have been abundant (Case 2003; IDB). Likewise, it could be argued that they could be used to fund programs, either at the national or local level, that respond to the types of policies recommended in this paper –such as the creation of day care centers or the promotion of after school programs for children of working parents.

### **The Capabilities Approach and Social Policy: Concluding Comments**

In an attempt to provide a framework for policies aimed at balancing family and labor market work, this paper makes explicit the connection between the capabilities approach and social policy. This allows us to discuss some of the critiques or disagreements regarding the capabilities approach. In particular, I want to focus on two of them: a) the approach is too individualistic, and b) it does not pay sufficient attention to social structures (Robeyns 2004). A corresponding critique is that it remains located at the theoretical level without enough reference to the collective processes of social policy and to the limits and constraints that they can encounter. However, I want to argue that, despite these questions, it provides a very useful framework that can shed light on social policy.

Replying to the critique that the capabilities approach is too individualistic, Robeyns makes use of the distinction between “ethical individualism” –which postulates that individuals are the only units of moral concern-- and “ontological individualism” which claims that “only individuals and their properties exist, and that all social entities and properties can be identified by reducing them to individuals and their properties” (p. 13). She then argues that “the capabilities approach embraces ethical individualism, but does *not* rely on ontological individualism,” adding that “it takes into account the influence of societal structures and constraints on... choices” (p. 14). By distinguishing between capability and functioning, she argues, it recognizes the social and environmental factors that make possible to actually convert one into the other. In addition, “the crossing from capabilities to achieved functionings require an act of choice,” and this choice is influenced by social structures and constraints.

Although Robeyns’ arguments are well taken, they do not make explicit the variables that affect the “act of choice” and they miss the more political aspects that define social structures and shape the economic regime under which potential capabilities can be generated and be converted into functionings. Doing so requires a more critical analysis of the factors shaping these possibilities. As mentioned earlier, the neoliberal regime has represented an ideological shift away from the state’s responsibility in social protection. In many countries, the role of the state in social policy has not only been reduced to a minimum and/or privatized; the state itself is often broke and any discussion that implies a government effort to deal with social policy requires a re-examination of its sources of revenue and even a political shift.<sup>12</sup> Public spending

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<sup>12</sup> It is interesting for example that, in Bolivia, the failed effort to increase income taxes during the Gonzalez de Losada government, sent a pessimistic message about the possibilities of fiscal reform. In this sense, Evo Morales’ government has raised new avenues with its announcement on May 1<sup>st</sup>, 2006 that it will re-nationalize the natural gas and oil sector. Although it is too early to tell how far this possibility can go, it provides an example of the new

has been handicapped by the enormous decrease in the relative amount of taxes paid by the business sector. Globalization has facilitated this process and taxation policies have been designed to provide incentives to capital; the result has been the increase in the relative share of labor-related or consumption-related taxes (Wachtel 2003). Thus, shifting from capabilities to achieved functionings requires an effort to redefine the social structures that have shaped policies during this period. In the specific case discussed in this paper, it implies that the adoption of measures aimed at reconciling different types of work requires a willingness to expand social interventions.

Given current trends in Latin America, the demographic transition and the increasing incorporation of women in the paid labor force are likely to continue. To the extent that countries will succeed in raising living standards and creating more jobs, domestic service as it exists now is likely to be less accessible to many households. This implies that balancing different types of work will become a matter of greater urgency than it is at present, but a conscious effort to meet these needs will require a political environment conducive to take up this challenge and allocate resources to the appropriate policies. This is not the environment that has prevailed during the past two decades during which the tendency has been a downward pressure on social policy spending. During this period, the emphasis has shifted away from encouraging social programs while the role of the state has focused on facilitating the expansion and functioning of the market at all levels. The assumption with regard to care needs has been that families and households could rely on social networks and find private solutions to their care needs. However, economic restructuring and marketization of life have gradually deepened the processes of social fragmentation and disintegration of these networks. As González de la Rocha (2006) has argued particularly for the case of poor households in Mexico, the capacity to build these networks has a limit, and it breaks down with the individualization of life and the further fragmentation of traditional social networks. Based on many years of direct observation of the efforts made by the poor to adjust to the changing realities of a globalized economy, her work is a call to recognize the limits of survival strategies on which neoliberal regimes have been relying. Hence the new gender order for Latin America requires to systematically rethink reconciliation policies towards a “universal caregiving model” for the region, and to redesign the scattered policies now in place in many countries. At the same time, the new agenda of gender equity needs to emphasize men’s equal share in the reproductive activities taking place within households.

This is of course a tall agenda that requires a change in the political will and is not likely to come easily. Political change in Latin America in recent years has resulted in a shift to the left although without a clear alternative way to replace the neoliberal model that has provided the framework for current social policies –or lack of them. In this sense, this is be an appropriate moment to deepen the “agenda of gender equality” mentioned in the quote at the beginning of this paper, thus responding to the need to find collective solutions to care provisioning -- in the same way as many Northern countries are doing so in order to deal with their crisis of care.

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tendency that seems to appear in Latin America towards a more interventionist state or more collective approaches to deal with social policy and social protection.

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