Discussing Globalization

FEMINIST REFLECTIONS

CLADEM

Discussing Globalization

FEMINIST REFLECTIONS

CLADEM

Discussing Globalization.
Feminist Reflections

Jr. Estados Unidos N°1295 Dpto. 702 Jesús María Lima, Perú

P.O. Box 11-0470, Lima – Peru
Phonefax: (51 1)4635898
E-mail: oficina@cladem.org
Webpage: www.cladem.org

Editor (Spanish version):
Roxana Vásquez Sotelo

Translation to English:
Alejandra Sardá-Chandiramani

Editing:
Radhika Chandiramani – Translingua Feminist Multigendered Translations

Cover design and layout:
Julissa Soriano

Photo:
Sandra Elías

First Edition:
Lima, Perú, February 2011
Legal Deposit N° in the National Library of Perú: 2011-02879
ISBN:……..

Printing:
Línea Andina SAC
Lloque Yupanqui 1640, Lima 11 – Perú

This publication has been made possible by the support of Oxfam Novib and Dutch Ministry of Foreign Affairs

CONTENTS

PRESENTATION

PRESENTATION

This publication is one of the outcomes of the workshop *"Globalization and its effects on the lives of women"* that our organization conducted in October 2009, with the aim of providing us with more elements to analyze a multi-causal and complex phenomenon of enormous political relevance for our actions. A particular feature of globalization is that it pursues its own course while we face its effects in our daily lives. Theoretical and political discussion on the issue is incomplete, and that is another reason why it is a fertile field for discussion. So, to approach a better understanding of globalization, we decided to combine different roads and methodologies.

The first part of our publication – Towards a Better Understanding of Globalization – is made up of four chapters. It begins with an introduction aimed at presenting the state of the art, a text that we deem valuable and very useful and that was produced before the workshop. In the words of its author – Peruvian lawyer Inés Romero Bidegaray – this work "is a first exploration on the reflections prompted by globalization as a phenomenon. Thus, it covers only the core of the debate that has been taking place around this notion. It is based on the available bibliography in Spanish and reflects a selection of texts representing the main positions and trends".

This text was only for internal circulation as a way of beginning, and allowed us to approach the study of the issue in an organized and thorough way, facilitating electronic exchanges through which we began to develop our first collective reflections.

The next three essays in the first section address each of the dimensions selected from the state of the art review, and have been produced by the three most outstanding participants in our virtual dialogues, whose reflections are based on the introduction. They are Moriana Hernández Valentini – from Cladem Uruguay – who dealt with the economic dimension of globalization; Thaís de Souza Lapa – from Cladem Brazil – who addressed the socio-political dimension, and Analía Aucía – from Cladem Argentina – who took on the cultural dimension. Hence, this first section provides a needed entrance into the subject.

The second section is focused on three fields that are an ongoing concern for women's human rights advocates: women's work, health and education. We wanted to ask ourselves how globalization is affecting these dimensions that also constitute basic rights

in people's lives. Each essay in this section has different theoretical and methodological approaches, and provides a regional overview together with some keys to understand what is happening to us through incisive critical analysis and views that call attention to the main problems that are affecting women in contexts where our rights are neglected by political and economic powers.

Social segmentation and fragmentation are part of the landscape, together with the weakening of public polices that have had serious impacts in terms of gender inequality; the increased transfer of care-giving responsibilities to the domestic sphere due to the deterioration of social policies, as the sexual division of labour remains basically untouched, adding to the disproportionate burden placed on women's shoulders, particularly of those women having fewer resources.

The essays in this section highlight that it is essential to take into account the fact that heterogeneity among countries and within each country adds an additional level of complexity to the analysis, allowing us only to point out some trends. To move ahead, specific diagnoses and more detailed country studies are needed.

Alma Espino – an Uruguayan Economist – addresses women's participation in the workforce; Claudia Giacometti – an Argentinean Educational Psychologist – deals with the field of health, while Nelly Stromquist – a Peruvian expert on Education and Gender, who has been living in the USA for several years – approaches the field of education. These three authors, outstanding and well-known scholars and experts in their respective fields of work, elaborate their reflections on the basis of previous research, including relevant figures and analysis, that draw a path towards understanding and identifying very clearly the knots of the problem, while developing considerations in regards to the current challenges raised by these realities.

The third section is devoted to getting to know the phenomenon of migration better and highlights female migration. As in the previous section, the reflections of these women experts who are well known for their work on the subject, reveal a landscape that is mostly unknown, challenging certain myths and prejudices that are only the product of ignorance or of the scarce attention that is still devoted to this issue.

The work of Gardenia Chávez – Ecuadorean Anthropologist – provides elements that help to understand the history and meaning of human mobility, devoting a good portion of her reflections to study the links between migration and human rights. She also examines

the case of Ecuador, her country of origin, and ends by suggesting a few challenges for the future.

The author affirms that "If the field of mobility is complex, the same applies to gender relationships. An interrelated analysis of migrations and gender requires the simultaneous study of women's and men's diversity, in national and international contexts, in structural as well as more subjective aspects. To see migration as a negative factor and women from a family perspective, without exercising their rights, as good producers of remittances (they send more money than men and also more regularly), and good credit payers, is taking an instrumental view of them, closer to the old understanding of women as workers for development projects rather than the idea of women as rights-bearers and of the incidence of gender relationships in the economy and in development models".

Ofelia Woo – Mexican professor and researcher – organizes her reflection in three stages. The first refers to the relevance of women's involvement in international migration and the labour market; the second to the importance of analyzing gender as a category to understand social and structural relationships; and the third to analyze the changes in the migratory process from a gender perspective, on the basis of the experience of Mexican women's migration towards the USA.

Ana Silvia Monzón – Guatemalan, with a PhD in Social Sciences – invites us to share her reflections as a feminist and a scholar, but also as the daughter of migrants because she considers that this is not only part of her identity but also of her way of life.

In her own words, migrations "particularly those of an international nature, are immersed in globalization processes that are transforming geographies, hierarchies, and power structures. In that complex, dynamic and contradictory context, women who migrate but also those who stay, start their journeys, face walls, live in between borders, continue to weave relationships, providing care, contributing with their visible and invisible work, facing challenges, longing for the return of those who left or renewing their promise to return".

Migration is a phenomenon that has been present throughout our lives as human beings. In the current context, what is relevant is to keep taking note of its impacts and the meanings it acquires in transforming subjectivities and the lives of us all. The three authors highlight the need to devote more efforts to research and follow-up of this complex and contradictory reality.

The fourth and last section brings us highly relevant reflections regarding what is happening to human rights in a context of globalization. The main text called "Globalization and Human Rights: Discourse and Reality of a Complex Relationship", by Gaby Oré Aguilar, elaborates an interesting analysis of the links between both fields, reviewing the most important areas that highlight what the author herself considers "...the limitations and dilemmas of the International Law framework, as well as the trends emerging in the process of responding to those challenges". Her essay also raises some of the issues making up what she calls "the emerging agenda" in the current context, as well as the strategies and actors involved in it.

The comments on this text by Maria Elena Reyes – Peruvian Lawyer – complement Gaby Oré's reflections and review different theoretical approaches linked to what globalization could mean for human rights, highlighting the paradoxes and likely incompatibilities between the yet in progress reflections on globalizations and human rights aspirations both in discourse and practice.

Both the workshop and the previous virtual exchanges provided us with a highly interesting and promising experience. The questions it raised, as well as our thinking about new ways to confront these changing scenarios that are full of ambivalence, were among the reasons that led to our decision to publish this compilation.

It is both curious and paradoxical that, in spite of all the references we have on globalization, taken from political and academic discourses as well as from what we hear and read in the media on the blessings or misfortunes that globalization brings, so little is still known of its processes and future possibilities. Many of us speak and have taken positions on globalization, but what do we really understand as globalization and how much do we know of its effects on people's lives? This was one of the questions guiding our reflections and, in our understanding, it is still unanswered and remains as an unavoidable challenge. Answers – very likely partial and provisional – will always be welcome, particularly if they are the product of serious analysis based on tracking reality in its different dimensions, as those of many of the authors in this publication.

Given that this is the context in which we are acting, we believe that in the true interest of articulating our goals and formulating our strategies better, it is important to strengthen our work with information and reflection of this kind that we consider key to continue on our path, because we have noticed that theoretical productions and field investigations – particularly those coming from Latin America and the Caribbean – are still few in

number. We have also realized our need to have more contributions that elaborate, analyze and refine future directions from a feminist perspective, to better understand the effects of globalization on women's lives.

We hope that this material we are publishing today is interesting and useful for all those who, like us, are still determined to understand in a deeper way the courses and dimensions of the changes we are experiencing, as well as the weight and magnitude of the persistence of discriminatory and exclusionary conditions drawing us away from achieving a democratic environment in which welfare is a reality for all.

Lima, August 2010

Roxana Vásquez Sotelo

SECTION 1

Towards a Better Understanding of Globalization

1. DEBATES ON GLOBALIZATION[1]

Inés Romero Bidegaray[2]

INTRODUCTION

A vast amount of theoretical and applied research has taken place about and around globalization. Different disciplines and perspectives have tried to explain and trace its origins, features and effects, starting from the complex dynamics it creates in the economic, political, social and cultural life, both at the global and local levels. Globalization has caused an intellectual reaction inspiring and organizing different schools of thought, as well as social and political movements in favour of and against it, and it continues to be a subject open to research and debate.

Globalization has to do with the idea that all of us are now living in the same world, as Anthony Giddens points out. But, how exactly? Is there only one globalization, or multiple ones? Which connections and dynamics exist between the economic, political, social and cultural dimensions of globalization, or between the global and the local? Does globalization present positive and negative aspects, advantages and disadvantages? How does it benefit women and at which levels? Is it gender-neutral? Does it introduce new exclusions and inequalities, while at the same time deepening the existing ones? Is it possible to build an alternative globalization paradigm? In fact, how much do we understand and know it?

The term globalization has different applications and meanings, but it usually refers to the notion of a process involving economic, political, social and cultural dimensions,

[1] This document was produced on commission by CLADEM's Training Program in 2008. It was the basis for the Electronic Dialogues that took place during the first part of 2009 and the axis for the development of the first session of the workshop.

[2] Peruvian lawyer, graduated at Pontificia Universidad Católica del Perú, with more than twenty years of experience in the public sector, national development and international cooperation bodies. She is an expert on public management, State reform and decentralization, policy design and evaluation, social development programs and projects, particularly in the fields of education and health, as well as on gender and human rights.

and projecting itself on people's lives, affecting them in unequal ways. The literature addressing globalization acknowledges that it is a complex process, vague and imprecise, still open and a 'work in progress'.

As a subject for study, globalization is less than thirty years old. The first texts approaching it come from the 80s,[3] even though it is only in the 90s that it becomes a privileged topic for researchers and scholars from different disciplines. The most studied dimension is certainly the economic one, but nowadays there are important developments in the political, social and cultural dimensions of globalization, along with a no less important narrative on what is being understood as the human implications of globalization.

The current work constitutes a first exploration on the reflections provoked by the phenomenon of globalization. As such, it only covers the core of the debate that has taken place around the notion. It was produced taking into account the available bibliography in Spanish and from a selection of texts representing the different positions and trends.

1. MAIN LINES OF THE DEBATE

The debate on globalization provokes an impassionate discussion in regards to its origins, causes, phases, intensity, scope, implications and current features. It is possible to identify two main lines in this debate. The first emphasizes globalization's features and historical trajectory while the second focuses more on its effects.

1.1 First line of the debate: schools of thought

Three schools of thought can be identified in academic debates: *hyperglobalizers* – also known as *globalists* – the *sceptics* and the *transformationalists.* This classification, created by Held, Mc Grew, Goldblatt and Perraton (1999) and followed by other scholars, is useful mostly for analytical purposes, considering that the authors placed in each category do not necessarily share the same ideological perspectives.[4]

[3] The remote origins of the notion of globalization can be found in French and North American texts of the 60s, but the more systematic attempts to define it have taken place later (Held et al., 1999).

[4] In each of these schools, it is possible to find liberal, neoliberal and conservative authors, as well as neomarxists, socialists and radicals.

For *hyperglobalizers,* globalization defines a new period in human history (Held *et al,* 1999). The defining features of contemporary globalization are three: global capitalism, global civil society and global governance. Relying on capitalism and technology, economic globalization in its historical trajectory seems to be pushing towards the birth of a radically new global order, a world-global civilization in which political and economic power gets de-nationalized and becomes diffused, moving more and more away from the nation-State.

Economic globalization progressively and in a persistent way subjects the State to the discipline imposed by the global capital. National governments end up reduced to little less than drive belts for global capitals or simple intermediary institutions, inserted between mechanisms of local, regional and global governance that are increasingly powerful (Held et al., 1999). For this school, the power of the traditional nation-State is eroded to such a point that is seen as anachronistic and in a way unviable.[5] In the description of the *hyperglobalizers*, the eruption of global economy, the emergence of global governance institutions and the diffusion and hybridization of cultures are read as evidences of a radically new global order that predicts the disappearance of the nation-State (Held et al., 1999).

This approach over-emphasizes the economic logic of globalization and, in its neoliberal variety, celebrates the emergence of a single global market and the principle of global competition as indicators of human progress (Held et al., 1999). Among *globalists,* those that are critics of neoliberal orthodoxy believe that globalization does not contribute to make the world less unequal, as others state. On the contrary, economic globalization provokes the emergence of a new international division of labour reordering the world and encouraging the development of a new model of winners and losers in global economy, a model that makes the old North-South division – defining the structure of the economic power in terms of center and periphery – anachronistic (Held et al., 1999). The rich and poor worlds would no longer be divided across geographical lines, because globalization produces an intensification of economic polarization and exclusion, within, between and across States (Held and McGrew, 2007, in reference to Birdsall, Castells, Gray et al).

On the other hand, and based on their analysis of economic statistics, the *sceptics* state that the contemporary levels of economic interdependence do not lack historical

[5] For *hyperglobalizers,* traditional nation-States have turned into unviable business units, that are even impossible in a global economy (Ohmae, quoted in Held et al., 1999: XXXII).

precedents,[6] and what is understood as globalization, that is, a perfectly integrated global economy (Held et al., 1999), is nothing but a growing internationalization process or, more accurately, an increase in interactions between economies that are mostly national in character (Held et al., 1999, in reference to the work of Hirst and Thompson).

From this perspective, globalization would be a myth, or at least an exaggeration. In the vision of its main proponents, economic activity seems to be undergoing a regionalization rather than a globalization process, that is taking shape at the same time that global economy moves towards the consolidation of three main financial and commercial blocs: Europe, North America, and the Asia-Pacific axis (Held et al., 1999).

The authors who identify themselves with this school of thought affirm that national States are not losing power and neither are they the passive victims of internationalization;[7] on the contrary, it is States themselves that are actively encouraging economic activities beyond their borders. They are the main architects of internationalization. These authors also point out that internationalization has not eroded the old North-South inequalities. From different angles, *sceptics* hold the thesis that in structural terms, the patterns of inequality and the hierarchies in global economy have changed only in a marginal way during the last century.

Lastly, the *sceptical* position denies the existence of a global culture and reaffirms the vitality of national-identity cultures as elements for social cohesion and political identity. Held and McGrew point out that the struggles for cultural identity and nationality have been so widespread that *sceptics* doubt they can be eroded by transnational forces and, particularly, by the development of an assumed global mass culture. They also argue that those defending the primacy of national identities stress its lasting qualities and the deep attraction held by national cultures in comparison with the ephemeral and substitutive character of the products made by transnational media corporations. (2003).

In *transformationalist* literature, globalization is understood as a powerful transformative force responsible for a maximum dispersion in societies, economies, government institutions and the world order (Held et al., 1999, in relation to Giddens). Contemporary globalization would be, for this school, a historically unprecedented process and at the

[6] They point out that in this phase of internationalization, the levels of economic integration – interdependence – would be even much less significant than they were at the end of the 19th century (Held et al., 1999).

[7] This school affirms that the *hyperglobalist* thesis underestimates the persistent power of national governments to regulate international economic activities. Rather than being out of control, the very forces of internationalization are dependent on the regulatory power of national governments to ensure a continued economic liberalization (Held et al., 1999).

same time contingent, contradictory and with an uncertain trajectory. In this process, all governments and societies have to adjust to a world in which there is no longer a clear distinction between international and domestic business, and foreign and national trade (Held et al., 1999, in reference to Rosenau, Ruggie, Sassen et al).

The feature distinguishing this school from the other two is the assumption that the growing global interconnection is transforming the nature and role of the State in the global system. It portrays the contemporary nation-State as trapped inside an extended network of global interdependence, and increasingly less able to perform its basic functions without resorting to international cooperation (Held, 1995). It believes that contemporary globalization reconstitutes or subjects government power, functions and authority to a re-engineering process (Held et al., 1999). Some authors speak even of a dismembering in the relationship between State sovereignty, territoriality and power (Held et al., 1999, in reference to the work of Ruggie).[8] According to Held, this literature tends to exaggerate the erosion of State power by globalization pressures and to underestimate the persistent relevance of the modern State, as a notion and as an institutional complex, in determining the directions for domestic and international policies (Held, 1995). In short, globalization would be linked both to a new type of sovereignty regime and to the emergence of non-territorial forms of economic and political power at the global level.

Transformationalists suggest that in the framework of reconfiguration of global power relationships, traditional North-South divisions, as well as those between the First and the Third World, give way to a new international division of labour, so the familiar pyramid expressing the centre-periphery hierarchy no longer reflects a geographical division of the global economy, but rather a social division (Hoogvelt, quoted by Held et al., 1999). In other words, globalization configures new patters of stratification, according to which some States, societies and communities are becoming more interconnected and integrated in the global order, while other are being increasingly marginalized.

[8] This school states that a new sovereignty regime is displacing the traditional notions of State as a form of public power that is absolute, indivisible, territorially exclusive and zero-sum (Held et al, 1999). It also points out that currently sovereignty is less understood as a territorially defined barrier than as a negotiation resource for a policy that is marked by complex transnational networks (Keohane, quoted by Held et al., 1999).

1.2 Second line of the debate: for or against?

In the other line of analysis, the one focusing mainly on the effects of globalization, the extreme positions are identified as *pro globalization* and *anti globalization*, even though absolute, totalizing or radical positions do not exist in any of the two sectors. Both attribute positive and negative impacts to globalization – and never neutral ones – as well as limitations, biases and potentials that present themselves in a complex and variable combination in terms of emphases and nuances.

Those advocating for globalization acknowledge that it generates asymmetries, that it has differential impacts across the world's regions, for countries, States and individuals in general, but they also highlight its advantages in the economic level and raise the need to "correct its defects", without questioning the assumptions on which it is based by introducing reforms oriented to mitigate or eliminate the negative effects that it produces and to distribute its benefits in a better and more equitable way. They say that globalization is an irreversible process, but one that can and must be governed, managed or controlled.

And those questioning globalization do not discard it either, but they consider that there is a need to redirect the process, building alternative forms of globalization. Thus, the theoretical reflection produced by this sector does not limit itself to critically characterize globalization, or to testify about the magnitude and intensity of its effects. Its main task is to point out the need to think and look for new roads to make the most of its advantages and to turn its disadvantages into opportunities for political actions and change, while it also makes efforts to outline or develop suggestions in that regard. But it has not yet been able to build an alternative model of globalization.

2. THE STUDY OF THE DIMENSIONS AND DYNAMICS OF GLOBALIZATION

The trend to approach the study of globalization in a partial fashion, highlighting one or other of its dimensions, or even some elements of them, is relatively extended, but there are also studies – some of them considered classical works – in which the approach is multiple or simultaneous, attempting and in fact managing to connect two or more of those dimensions. Case studies are numerous – referring to regions, countries or concrete populations – but most of them are focused on only one of globalization's dimensions or in some distinctive aspects of it.

Texts seeking to understand globalization from a historical-social perspective occupy an important space in the literature on the subject. Frequently, their authors refer to globalization as a process in permanent evolution that has its origin in past centuries, even though there is no agreement on its point of departure or its chronology.[9] There are numerous narratives along this line, linking globalization with the evolution of the capitalist accumulation model and, as a result of that, affirming that its origins can be found in the dawn of capitalism, in the collapse of the European feudal system and in the mercantilist transition.

But there is another sector that approaches it as if it were a contemporary phenomenon, relatively recent, even though it does not express it in these terms, nor recognize it explicitly. On the extremes there are scholars who, from a more restrictive perspective, understand globalization as a phenomenon that is fundamentally or essentially economic and corresponds to the phase of deep financiarization[10] of the economy,[11] and others who from a broader perspective, link it to the period of vertiginous development of information and communication technologies, that allows for the intensification of cross-border interactions of all kinds – and not only economic ones – at levels and in ways that have no historical precedents.

In the section that follows we will present a summary of the debate on globalization, as carried out by the scholars who were reviewed. The two lines of the debate that have been introduced in the former section are present in the reflections of these authors.

---

[9] Aldo Ferrer (2000) places its birth in the last decade of the 15th century. For this author, the landing of Colon in the American continent and of Vasco da Gama in India open what is known as the First Global Order, corresponding to the first phase of globalization, that would extend until 1800. The Second Global Order – or second phase of globalization – would start taking shape with the Industrial Revolution as a dominant phenomenon until 1914, while the Third Global Order – corresponding to the third phase of the process – would start in the second half of the 20th century and is still in place. Ferrer calls the period that goes from the beginning of the First till the end of the Second World War as a de-globalization phase during which the integrating forces of the international system were transitorily interrupted.

[10] In a broad sense, it implies the prevalence of money-capital – financial – over productive capital (Amin, 1996: 134).

[11] Among the authors adhering to this line, some prefer to speak of "financial globalization". Fernando Soler (2001), for instance, understands globalization as "an essentially economic phenomenon that could be materialized at first, in a process of international economic integration characterized by market liberalization, basically ... in the financial sense and, as a result, the deep financiarization of the economy. This is true to a point that he prefers to speak of financial globalization´, a term that would designate the transformation of the financial international system, caused by the suppression of national borders for capital markets, as well as for decompartmentalization of financial markets" (translation ours).

3. THE ECONOMIC DIMENSION OF GLOBALIZATION

This is the dimension that has attracted the most attention. The literature selected for what will be presented next basically comprises the two main lines along which economic globalization has taken place up to now.

3.1 Structural analysis: capitalist globalization and the financiarization of the economy

An important group of authors linking globalization to the evolution of the capitalist accumulation model is placed in this current. For these authors, globalization is an intrinsic process to the development of capitalism, a trend of global capitalism since modern times.[12] As such, its evolution would be associated with the periods of expansion and crisis of the capitalist production system. They point out that in the history of capitalism, all periods marked by a fast and stable expansion of global production and trade have always ended in a over-accumulation crisis,[13] that has in turn lead to a phase of greater competition and financial expansion. So, financiarization could be, at the same time, a symptom and a recurring aspect of this over-accumulation crisis.[14] However, in each period, financiarization seems to have had qualitative particularities and not just differences in terms of scope and intensity.[15]

For authors of other trends, financiarization would be a mechanism to which the system resorts in order to create the necessary conditions for a new expansion of the production system. Samir Amin moves away from the notion of financiarization as a phase that is bound to lead to a consolidation of those conditions, as a response to the neoliberal

[12] "Capitalist globalization" is the term used by these scholars, and they use it in a comprehensive sense, because they do not limit it to the economic sphere.

[13] These crises are the consequence of over-production – or over-capacity – in relation to that which is natural to the system. They show a tendency to stagnation that, in each phase of growth, is overcome by reasons that are specific to that period (Amin: 1999).

[14] Amin expresses his doubts in relation to the "recurrent" manifestation, if this is understood as "regular", because it can be treated as a "repetition", that is, a mechanical extrapolation to qualitatively different historical configurations. For the same reasons, he rejects the idea of "financiarization cycles", used by some scholars, and prefers to speak of "accumulation phases that are specifically different".

[15] See Amin, 1996: Chapter 5.

current believing that the global economy's structural adjustment[16] cannot avoid this phase. He rather believes that financiarization is a form of managing the crisis and not of overcoming it, so that the conditions for a new expansion would not result of the crisis itself but would emerge elsewhere, apart from this phenomenon. As an example, he mentions the crisis affecting Europe between 1880 and 1945, that signalled the decline of Great Britain as the organizing core for the capitalist system's expansion since the Industrial Revolution: financiarization did not help Europe to overcome the crisis, as the forces for renewed industrial progress crystalized in the USA, somehow at the margins of this disastrous financiarization. (Amin, 1996).

In a general sense, because no agreement has yet been reached on the issue, the birth of what Arrighi calls the "current wave of globalization" is considered to have been between the end of the 60s and the beginning of the 70s,[17] before the first oil crisis. Those years mark the end of the post-war prosperity and the beginning of a new crisis that will end in the collapse of the system, around which the capitalist expansion of the previous phase had been structured.

The post-war – known as the ¨golden age" of capitalism in the 20th century – was, besides a period of economic stability and relative prosperity – one of capitalist expansion, that according to Amin differed from the current process in that it was controlled. During the twenty or twenty five years it lasted, there was an extraordinary growth of production and trade[18] under the framework of the Bretton Woods agreement,[19] strong State interventions, semi-fixed exchange rates and controlled capital movements (Borón, 2002).

For Samir Amin, the post-war prosperity was not a product of the efficient handling of the international monetary system – like other authors affirm or seem to suggest – but of the development of three complementary projects: European reconstruction driven by

[16] Structural adjustment would solve the unbalances causing stagnation of production and trade. In economic theory, correcting the factors responsible for this situation would allow for a new phase of growth and expansion.

[17] It is not clear that the current phase of globalization had indeed begun in those years. Some authors place their beginning in the 80s, while others make it coincide with the fall of the Berlin Wall or the decade of the 90s.

[18] Between 1950 and 1973, production and growth grew, respectively, with average yearly rates being around 9.5% and 5.3%, while between 1870 and the start of the First World War, these rates reached average values of around 3.5% per year (Borón, 2002).

[19] These agreements, known as the "peace and prosperity agreements", were adopted in the context of the United Nations Monetary and Financial Conference of 1944, that led to the creation of the International Monetary Fund (IMF) and the World Bank (WB). The creation of the General Agreement on Tariffs and Trade (GATT) was delayed until 1948, but this agreement is also seen as part of the whole known as "Breton Woods agreements". In 1995, the World Trade Organization was created to replace GATT.

the Marshall Plan,[20] the leadership of the Welfare States that based their actions on a historical agreement between capital and labour[21] and the efficiency of interdependent national systems; modernization and industrialization of the periphery, inspired by the "development theories" that prevailed in Latin America and Asia;[22] and the "capitalism without capitalists" practised by Socialist regimes, that implied a sort of disconnection from the ruling global system and a development that was relatively independent of it.

The debate on the origin and causes of the crisis that ended up collapsing the system born of the Post-War travels along different planes. In response to other authors – orthodox liberals and neoliberals – those endorsing the thesis that the crisis was due to over-accumulation and immanent to the expansion of the capitalist system[23] state that neither the origin nor the causes of the crisis are explained by the weakening of the Bretton Woods institutions or by the concomitant emergence of extraterritorial and deregulated financial institutions,[24] but by the system's own logic. Samir Amin goes a bit further by stating that when the three projects mentioned above fall into a crisis, eroded by the dynamics of capitalist globalization, it is because the balance and stability reached during the Post-War years have vanished. For Amin, the collapse of the Bretton Woods system is indeed a consequence of that crisis.

To better understand the scenario configured by the crisis that will lead to a later financiarization phase, we need to examine a few issues that are recurrent in the analysis carried out by most authors in International Political Economy texts when approaching the genesis of the current phase of economic globalization, or financial globalization, as some of them underscore.

In general, it is pointed out that while the model born out of Bretton Woods was in place, the international economic order was based on a set of rules managed by international

---

[20] It was adopted in 1947 and was in force for 4 years during which European countries received around 13,000 billion dollars (the original budget was of 17,000 billions). The Soviet Union and the Eastern European countries did not take part in this Plan, designed mainly by the USA State Department and funded by the USA. The help from the USA was used to activate those European markets that were needed by USA corporations to place their surplus production and to curb the growing influence of locally-inspired Communist parties in Europe. Even though the alliances resulting from the Second World War were still in place and the Cold War had not yet started, the Marshall Plan constituted the core of the containment policy towards the Soviet Union.

[21] Encouraged by the Social-Democrats.

[22] The conference from which the Non-Aligned movement and the goal of modernizing and industrializing the Third World took place in 1955. That project included the creation of national bourgeoisie as part of the developmentalist ideology. (Amin, 1999).

[23] Samir Amin and Giovanni Arrighi, together with other authors quoted by them.

[24] Offshore, that is, operating outside the State and international regulation and overseeing systems.

institutions (IMF, World Bank and GATT-WTO) that allowed – genuinely or artificially – for safeguarding its stability and for enabling economic growth and the expansion of international trade.

a. US dollar as a reference standard for currency conversion, with a fixed price for an ounce of gold (a substitution of the gold standard).
b. Fixed exchange rates, that could be exceptionally readjusted to regain stability. For this reason, some authors refer to "semi-fixed rates".
c. Control over capital flows, provided international trade is not being hindered.
d. Open and free trade, through the reduction of tariffs and other barriers to international trade (like dumping, import quotas and unjustified national administrative or health regulations).

When analyzing the Bretton Woods system it is usually said, as an introduction, that the order born of the negotiation between Great Britain and the USA was the result – and reflection – of the negotiation power of the latter, of its emerging hegemonic position as an economic and military power, so the system would in the end be shaped to consecrate advantages for the USA that would favour its placement as a new organizing centre for the expansion of the global capitalist system. The US dollar as reference standard and the privileged position of the USA in the governance of Bretton Woods institutions are expressions of these advantages.[25]

Beyond the discussion that can take place on the role played by Bretton Woods institutions in the new international economic order, as "accomplices" and pushers for the economic globalization hegemonized by the USA or as active participants in the crisis unleashed around 1970, studies exploring the conditions that set up the more immediate scenario for this crisis outline a set of factors that their critics tend to see only as partially explanatory of the crisis and the later financiarization of the economy.

Hopenhayn and Vanoli (2002) point towards the growing weakness of the dollar as the main factor[26] that gave rise to speculative movements running in parallel with the strengthening of international financial markets.[27] Two other factors shaped the context

[25] Authors from different currents, like Amin (1999), Hopenhayn and Vanoli (2002) and Stiglitz (2002) reach a basic consensus in characterizing the system born of Bretton Woods, but differ in their conclusions, particularly in the explanatory hypothesis for the crisis unleashed around 1970 and the role of the BW's institutions in it.

[26] The weakness of the dollar increased as its gold backing diminished. By the end of the 60s that backing had experienced an important fall, going from 55% to 22%.

[27] Authors place the emergence of offshore financial institutions (tax havens) in the mid-60s. These institutions rapidly expanded in the 70s, together with the fast rise of financial intermediaries other than banks and the transformations experienced by international banks that began to perform "off-balance sheet activities", that is, similar to those of tax havens.

in which the weakness of the dollar can be explained: the competition problems experienced by the USA with the European and Japanese economies, and its increasing fiscal deficit, basically fed by the growing expenses resulting from developing and sustaining its hegemonic military project.[28] In their view, all this ended up undermining the monetary regime and precipitated the fall of the Bretton Woods mandate when in 1973 the overall fixed exchange rates system gave way to one of floating exchange rates.

The weakening of the international monetary regime is undoubtedly connected to the relative decline of the USA. Samir Amin describes the period before the end of European reconstruction and the opening of its economies, that for a long time were subjected to control over capital movements, as a phase in which there was a huge "thirst for dollars".

This scenario changed drastically in the 70s, when dollar scarcity gave way to an excess of dollars, to the release of a mass of dead capital, of a "floating mass of capital that had nowhere to go", according to Amin (1997). The new situation is basically explained by the concurrence of two factors: expansive fiscal policies applied by USA to cover its deficit[29] and the crisis provoked by the erosion of the basis for the post-war prosperity that made productive investment opportunities collapse.[30]

To this mass of floating capital it must be added a no less huge mass of liquid surplus released by the oil price crisis of 1973 ("petrodollars"), with no possibility of being placed in countries in which there was already surplus,[31] putting pressure on the market and on States to look for more profitable outcomes for investment, which in turn set the basis for the future transformation of local and international financial markets, and the later financiarization of the economy (Hopenhayn and Vanoli, 2002), even though in fact the latter would not start until 1980.

Most of this mass of capital, that ended up in the bank's coffers, found an outlet in financial speculation. The explosive growth of foreign debt in Third World countries – particularly Latin American ones – is explained in this context,[32] marked by the abundance

[28] The USA resorted to an expansive fiscal policy in order to fund its military investment in Viet Nam and to sustain its hegemonic military position in the context of the Cold War.

[29] In order to fund its deficit, the USA resorted to issuing circulating money that, in the context of the productive investment crisis, stays floating, without any possibility to be placed anywhere.

[30] By the mid-70s it was already clear that the global economy had entered into a phase of stagnation, with inflation and a considerable instability in exchange rates, prices and interest rates (Hopenhayn and Vanoli, 2002).

[31] The countries having a surplus in their current accounts tend to export capital.

[32] Between 1976 and 1982, Latin American foreign debt grew almost four times: from around 11 billion dollars to 40,000 (Hopenhayn and Vanoli, 2002).

of dollars and financial institutions eager to place them for a profit (Hopenhayn and Vanoli, 2002: 30). The subsequent Latin American foreign debt crisis, that took place in the 80s, was to be the last straw for developmentalist policies seeking modernization and industrialization in the region.

Figures from studies show the unprecedented magnitude and intensity of contemporary financiarization and its emphasis on speculative placement. Arrighi (1997) quotes the work of Saskia Sassen in which she points out that since 1980, the total value of financial assets has increased two and a half times faster than the aggregated GDP of all rich industrialized economies. And the volume of the trade in currencies, obligations and capital shares has increased five times faster. The first in 'globalizing' itself and currently the biggest and in many senses the only genuine global market, is the currency market. Currency exchange transactions were ten times more than global trade in 1983; only ten years later, in 1992, those transactions were sixty times more.

In 1999, transactions for currency exchange were already 70 times more than the volume of international trade, and in 2003 they became 80 times more (Sassen, 2007). When figures are analyzed from the perspective of the relationship between financial flows and international trade, there is also no doubt. The volume of international financial transactions has grown significantly since the end of the Second World War, by when it already represented about five times more than the volume of international trade, but nowadays that volume is almost five hundred times larger and only 3% of international financial transactions is linked to the trade in goods (Borón, 2002)[33].

The unceasing growth of financial flows without any significant link to the real sector of the economy has run in parallel with the spread of the crisis in productive investment and the collapse of the Bretton Woods system. In this sense, it was encouraged by the concurrence of several factors, including the permanent growth of free capital, the adoption of the floating exchange rates system, and the deregulation operating in the capital markets, that allows capital to circulate with great freedom and is also accompanied by the creation of a sort of transnational legal regime guaranteeing property, safety in contracts and the return of profits obtained by extraterritorial operations (Amin, 1997; Borón, 2002; Hopenhayn and Vanoli, 2002; and Sassen 1999). Speculative placement is, in the end, one of the strategies followed by capitalist agencies to avoid

[33] Hopenhayn and Vanoli point out that due to the speed and the form in which this huge mass of money is currently circulating through international financial markets, it is very hard to accurately estimate its real magnitude and destination, and that even though it is known that a good part of it is channeled into specualtion, every year there is a volume estimated at around 50 billion dollars whose destination is unknown (2002).

capital depreciation, probably the most important strategy in the current phase of financiarization and the one that explains to a great extent the financial crises that have taken place since the 90s (Amin, 1997; Hopenhayn and Vanoli, 2002).[34]

The spectacular development of information and communication technologies has provided, as Hopenhayn and Vanoli (2002), Bauman (1998) and Sassen (1999) point out, the material basis, the road on which financial capital has stood to perform its operations on a planetary scale, real time and no cost, but it is not the origin nor the carrier of financial globalization. It is an independent process, even though it is functional to it. It also constitutes one of the most important means employed by capitalist agencies to evade any possibility of control from the part of national States or any monitoring body on the movements of capital that they perform.

Giovanni Arrighi compares the novelty of the current information technology revolution with the ones that were once brought about by the train, telegraph, radio, telephone or car. He states that all are equally impressive and calls attention to the fact that the virtualization of economic activity is not a new phenomenon,[35] even though its scope, intensity and scale have been much more than the past ones. Saskia Sassen devotes a larger portion of her research to analyze the role played by telecommunications – particularly telematics and micro-electronics – in expanding global capital, through their dual function: as a mechanism for its circulation and dispersion, and as an investment sector with clear tendencies towards concentration and the creation of oligopolies.

3.2 Institutional analysis: Globalization and the Bretton Woods Institutions

Among the authors in this line of the debate, whom we could call "liberal", there are several nuances and some important differences. It is worth mentioning that in some of their analyses there are points of coincidence – though not in the approach or in the main issues – with the earlier line of the debate, particularly in terms of the role that the IMF, World Bank and GATT-WTO have played until now in globalization and the recent financial crises.

[34] The purpose of this document is not to detail what has been written about the most recent financial crises (Mexico 1992 and 1994-95, East Asia 1997-98, Russia 1998, Brazil 1998-99 and Argentina 2001-02), extensive information on this topic can be found in Hopenhayn and Vanoli, 2002: 75-110, and in Stiglitz, 2002: Chapters 4 and 5).

[35] According to the author, the markets of different continents, interconnected through telegraphic networks operating with submarine cables, were able to perform trade and financial operations at a distance since 1860.

The authors reviewed focus their analyses on globalization on the current phase of financial expansion and, even though they don't express it in this way, they describe it as if it were a strictly contemporary phenomenon. They argue that globalization per se is not good or bad, but given that it is necessary – besides being unstoppable – it has deepened and broadened the already existing gaps between countries and populations within them, with undesirable effects that have even been devastating for some. They acknowledge that there are asymmetries in the enjoyment of the benefits of globalization, but point out that this is due to the mistakes that have been committed in its management and not to structural reasons, and attribute them to the "market fundamentalists" that took over the international institutions that came out of Bretton Woods (Stiglitz, 2002 and 2006; Soros, 2002).

The use of the metaphoric "brakeless train causing havoc", to refer to the current globalization process and the need to govern it, in the sense of slowing down and do more and better to attenuate its negative effects,[36] is very present in the analysis of globalization advocates, along with the references and examples aimed at balancing the disadvantages with the advantages they attribute to it.[37] Most of them express their concern for the reactions against globalization and the possibility of social conflicts that might end in chaos or generate disorder and instability for the system. That is why they vigorously call attention to the shortcomings of globalization – known as the system's "failures" – and also to the mistakes of those managing the process, and the resulting need to correct both.

These authors formulate serious challenges to the way in which globalization is being managed. They object to the speed of changes fostered in peripheral countries to consecrate market economies. In general, they point out that the sudden opening of free trade and free movement of capitals in developing economies as advised or, to be more accurate, "under pressure from" the Bretton Woods institutions are partly responsible for the increase in poverty and the widening of economic and social gaps between countries and within them, as well as for the unleashing of the recent financial crises.[38]

---

[36] Taken by Arrighi from Thomas Friedman "Roll Over Hawks and Doves", The New York Times, February 2, 1997.

[37] Several references and examples can be found in Stiglitz (2003: Chapter I) and in Soros (2002).

[38] See Stiglitz (2002, Chapters 4 and 5). The author thoroughly analyzes the policies implemented by the IMF before and during the crisis of the East Asian countries and Russia. He shows a large amount of evidence proving how the IMF policies serve the interests of what is known as global finances, and how its rescue programmes (loans for countries in trouble) have been aimed at "rescuing the creditors", that is, to guarantee the payment of public and private debt contracted with international banks.

The reflections of Joseph Stiglitz are particularly interesting. He states that the role played by international institutions, particularly the IMF and GATT-WTO is rightly questioned by globalization critics, because it is true that the treatment they grant to the richest developed countries and to developing countries is unequal. But he goes further by affirming that the behaviour of these institutions has aimed to consecrate all kinds of advantages for the former, to the detriment of the latter, and that this is not a coincidence but a reflection of the control that the richest countries, and particularly the USA, exert over the developing ones.

The evidence of that asymmetrical treatment is before our eyes: in the subsidies to the industrialized economies' productions contrasting with the obligation imposed on Third World countries to cut their subsidies that apply to the production of industrial goods; in the protection of their markets (through mechanisms such as quotas for foreign products competing with local production and anti-dumping laws) against the demand placed on peripheral countries to suppress all tariff and administrative barriers to the importation of goods and services; in the maintenance of high deficit, in the case of the USA, against the demand that Third World countries conduct structural adjustments even though it means sacrificing their medium and long term development possibilities;[39] in the flexibilization of controls over capital markets benefiting industrialized and exporting capital countries while the Third World's emergent economies are being damaged by the departure of huge flows of speculative capital; or in the protection of intellectual property, particularly industrial medical patents, depriving poor countries from accessing the benefits of scientific progress, to give just a few examples (Stiglitz, 2002).

The criticisms expressed by Joseph Stiglitz and George Soros are similar on this point to those pointed out by the other school of thought, but the way in which both authors read the economic globalization process places them at a considerable distance. None challenges the background issues related to the type of economic system imposed by capitalist globalization and its underlying market ideology. Their questionings are rather aimed at "market fundamentalists" of the neoliberal model, that they consider both

[39] An example of this was the Washington Consensus, whose constitutive pillars were fiscal austerity, privatization and market liberalization, policies designed by the IMF and the World Bank in the context of the Latin American foreign debt crisis that jeopardized equity and was about to make international creditors insolvent, and particularly the USA banks. Later on, those policies would become a "recipe" for all Third World and Eastern European countries. Reforms resulting from the Washington Consensus ended the developmentalist aspirations of Latin America, broke the very little that had been achieved until then through building Welfare States, and unconditionally inserted those countries in a subordinate role in the global order. According to William Robinson (2002), 556 structural adjustment and stabilization programmes had been implemented in more than 70 countries.

irrational and dangerous for the survival of the system itself.[40] That is why their main concern is what needs to be done and how for capitalist globalization to work or, as Soros would say, to be more fair.

For Stiglitz, globalization in its current shape is not working. It is not working for the poor, or for the environment or the stability of global economy, but the solution is not to abandon it, not only because it is not possible to do so but also because it is not desirable. The problem is not globalization but the way in which it has been managed. And in this regard, he believes that globalization can be redesigned so its potential for good is realized, and that international economic institutions can be redesigned to achieve this end (Stiglitz, 2002). Soros articulates a similar point of view, but he is sceptical about the possibility to carry out any substantive reform to institutional architecture.

However, Samir Amin (1997) remembers that poverty and unequal income distribution are not the product of mistaken policies or defects that can be corrected, but of a polarizing logic that is intrinsic to the global capitalist system, so poverty, inequality and exclusion are and will always be permanent effects, even though their intensity can be diminished or intensified in particular circumstances. He is in favour of reforming international economic institutions, but doubts that it would be possible to do so, as they fulfil a role that is strategic and functional to the interests of capitalism and the USA.[41] The liberalization of capital markets, the indebtedness of Third World countries, the floating exchange and interest rates are not mistakes, but part of a coherent policy package that, besides providing profitable outlets for inversion in the short term to financial capitals, allow the USA to extend its hegemony by sustaining the international role of the dollar (as a tool for reserve, measurement unit and exchange means) and allowing it to finance its deficit, either by draining the surplus produced in other developed regions and the savings accumulated in the less developed ones, or by forcing its weaker partners – peripheral economies – to conduct unilateral structural adjustments.

---

[40] For Soros, what is at stake is the project of an "open global society" that he understands as a free society, based on the interest of humanity and on principles that are expressed through democractic forms of government and through market economy. He does not believe in the utopia of a self-regulated market that constitutes the basis of most of the neoliberal ideology and he thinks that the un-regulated processes of market formation are self-destructive: markets are amoral because they allow people to act on behalf of their own interests without any obstacles; markets are effective to create wealth but not to distribute resources or to guarantee the satisfaction of social needs, and global financial market are prone to crisis (Soros, 2002).

[41] Regarding the reform of Bretton Woods institutions there is more than one proposal. The author exposes the key points for reform advocated by those intellectuals who want to go back to Keynesian postulates, the proposal defeated in the negotiations led by Great Britain and the USA after the end of the Second War (a summary of this proposal can be found in Amin, 1997). There is also a reference to the currently prevalent schools of thought (in the same text).

The analysis of economic globalization is not exhausted here. The reviewed texts elaborate on other issues that are closely linked to it but will be approached later, either because they are placed at the intersection of the economic and other dimensions of globalization, or because the effects projected are better understood and explained from them.

4. THE SOCIO-POLITICAL DIMENSION OF GLOBALIZATION

In this dimension there is also an important academic production, even though it is not as vast as that dealing with economic globalization. The core of this production is constituted by studies prioritizing one issue or aspect of the phenomenon, on the basis of which they analyze the links between globalization and those processes or transformations operating at the political and social level. The framework against which a good portion of the theoretical reflection is conducted is – explicitly – capitalist globalization. The topics that are placed at the centre of these studies include the nation-State; inequality and exclusion, approached by some as capitalist polarization or translated in terms of the centre-periphery relationship; and international migration. There is one additional topic, the role of global cities in globalization, introducing an interesting analytical perspective that is related to the former ones in many ways.

4.1 The nation-State and the sovereign States system

The relationship between economic globalization and the nation-State has resulted in the production of hypotheses to explain the nature and the direction of changes that are taking place within the organization of political power, and also to offer a prognosis on the future of the sovereign States system on which is based the expansion of the capitalist system in its modern and finished way as industrial capitalism.

Theoreticians of the system-world understand that the capitalist system functions as a "world-economy", operating in the framework of a political system structured in sovereign States. Along this line, Giovanni Arrighi (1997) highlights the role played by the nation-State in capitalist formation and development, from its national form to its current form as global capitalism, emphasizing the formation of a global capitalist system and its consequent transformation from one world into many worlds, until it became the socio-historical system

of the entire world that has been based on the construction of territorial organizations able to regulate social and economic life and to monopolize the means for coercion and violence. In each phase of the system's stable expansion, there has always been a core that organized the expansion of global production and trade, harvested its benefits more than any other and held economic and financial power also more than any other.

The gradual formation and expansion of the global capitalist system had then operated from territorial organizations having the resources and structural position needed to organize global capitalism as a whole and to impose the rules, normative environments, etc. that allow the system to function (Robinson, 2002). Arrighi calls these organizing centres "tracklaying vehicles" that in each new phase of the system's expansion, always preceded by one of financial crisis and expansion, had taken the place of the territorial organization conducting the expansion in the previous phase. Thus, the globalization process seems to have emerged, in each of these expansion phases, with the emergence of organizing centres showing a larger scale, scope and complexity than those at the previous stage. According to Arrighi, in this recurrent process in which each substitution takes place against a framework of the crisis in the territorial organizations that had led the previous expansion, the nation-State crisis would not be a new phenomenon.

This theoretical approach, underlying many of the debates around the relationship between economic globalization and the nation-State, is favoured but also rejected by the scholars who have approached the subject. However, most of the detractors acknowledge the relative validity of this thesis, as they are in agreement with the proposition according to which the sovereign States system was key for the development and expansion of the capitalist system in the industrial age. They admit that without national States able to produce, organize and sustain the economic, social and political conditions allowing the capitalist accumulation and reproduction processes to take place, there would have been no construction and expansion of self-centred production systems, that marked the capitalist development in the 19th century and the second half of the 20th. During this phase, known as "capitalism with national roots",[42] capital and territory were interwoven in a relationship in which the nation-State fulfilled a key role because production was anchored into a space controlled by it.[43] But now as a

[42] The commitment of the State with this kind of development was manifested through the role it took: protecting the domestic market, developing infrastructure to support production and trade, protecting property rights, providing guarantees for the inviolability of contracts, creating favourable conditions for scientific and technological innovation, fostering the formation and expansion of trade and financial networks, educating and training human resources, controlling and solving conflicts, creating a labour relations system, etc.

[43] The control over production and financial/trade networks relied on national capital business located within the borders of the nation-State.

result of space/time being compressed to unprecedented levels, production seems to have broken free from the restrictions imposed by territory, the future of the nation-State seems to also be challenged.

Now, the debate on the relationship between globalization and the nation-State has basically moved between two extreme positions.[44] The first one, sponsoring the argument about the declining importance of the nation-State and the consequent erosion of the sovereign States system; and a second one, moving around the notion that the functions of the nation-State are still essentially the same and very little has changed in it. From the latter has also resulted a third variety developing the thesis that nation-States are going through an adaptation and transformation process as a result of which they will not lose power.

4.1.1 Decline of the nation-State, erosion or twilight?

The thesis on the declining importance of national States is advocated by a group of scholars who see in the forces of globalization the seed of its disintegration or the effective dissolution of its sovereignty before transnational powers represented by global capital. Zygmunt Bauman points out that now, in the age of capital mobility – whose freedom of movement seems to be unrestricted – power seems to have broken free from the territory[45] – it has become extraterritorial – and, as a result, State ability to impose rules and limits on capital also seems to have been diluted.[46] He considers that the basis on which the modern State's legislative and executive sovereignty lies – military, economic and cultural self-sufficiency – the three legs of the sovereignty tripod, have been challenged and have suffered irreparable damage; nation States have been expropriated and practically reduced to the role of executers and plenipotentiaries of forces that they have not even a hope of ever controlling (Bauman, 1998). His prognosis is not encouraging: the process is far from having concluded and nothing seems to stop

[44] It is important to take into account that the theses developed here are the result of a debate that basically has taken place in and for societies that have managed to consolidate national States and a finished process of industrial capitalism. As such, they can not be automatically applied to Latin American and Third World countries to explain and characterize the changes that globalization would be producing in the configuration of their States, because in these countries there is hardly any national capitalism as a finished form of industrial capitalist development, or a Welfare State.

[45] He speaks of experiencing a power without a territory and adds that, thanks to the new incorporeity of power, particularly in its financial expression, those who hold it become extraterritorial, even though their bodies remain *in situ* (Bauman, 1998).

[46] He quotes Claus Offe who describes the scope of this thesis by saying that since borders became porous (though, in a very selective fashion), sovereignties have also become nominal; power, anonymous and its position, an empty one (Bauman, 1998).

it, the economy continues unrelentingly ahead on the path of liberating itself from every political control, depriving the territory of the meaning that it had until very recently as the space for the State's collective management.

For Susan Strange, one of the main advocates of the *hyper-globalist* trend, State borders have been swept by a rhythm of change that society had never experienced before. The underlying premise to her analysis is the idea that territorial borders no longer coincide with the limits that political authority holds on economy and society (Strange, 1996). A stir has been caused in the balance of power between the State and the market, that resulted in a growing displacement of authority from the former to the latter,[47] its main cause being the high speed of technological and financial changes. This has affected the governments of all States, big and small, strong and weak, and the accelerated integration of national economies into a single market economy has also contributed. (Strange, 1996).

The decline of the State is reflected in a growing diffusion of its authority into other non-State institutions and associations, as well as into local, regional and supranational organizations. In other words, during the last quarter of the century, the centre of gravity of world politics has moved from State public bodies into private bodies of different kinds, and from States into markets and market operators (Strange, 1996). As a result of that, the State's authority is being emptied and the paradox is that this, to a large extent, is a consequences of the State's own policies. However, this does not mean that States will disappear, at least in the foreseeable future (Strange, 1996).

Samir Amin (1997) addresses the problem of the nation-State in the framework of what he considers an insurmountable contradiction for capitalism, as a result of the separation between the capitalist economic management space – that is increasingly being globalized – and its political and social management spaces that are still confined within the nation-State borders. This globalized economic management is done in detriment of national States and undermines the basis on which their political and social control functions lie, but does not necessarily lead to their extinction. The divorcement between the accumulation capitalist sphere – that has moved to the global space – and its reproductive counterpart – that remains constrained within the space controlled by the nation-State – lies at the bottom of the erosion of the self-centred nation State, that marked the development and expansion of capitalism in the phase that culminated in the post-war systemic crisis around 1970.

[47] Transnational corporations and the networks through which they operate are increasing their power in detriment to the authority of States in society and the economy (Strange, 1996).

On the transformations that have taken place in the architecture of political power associated with the modern nation-State, David Held affirms that the fact that States are operating in an international system that is increasingly complex limits their autonomy (in a radical way, in the case of some spheres), progressively undermining their sovereignty. Thus, nowadays sovereignty must be understood as a faculty divided between multiple agencies – national, regional and international – and restricted by the very same nature of this pluralism (1995). The evidences that international relationships erode the power of the modern sovereign State are undeniably solid (Held 1997), but everything indicates that, at worst, the nation-State will be just one type of political actor among others, lacking all sorts of privileges in the international legal other (Held 1997). In this way, he questions the conclusions reached by those who announce the end of the nation-State, because he considers that they fail to recognize the persistent capacity of the State apparatus to shape the direction of domestic and international politics. (Held, 1995).

4.1.2 Permanence and reconfiguration of the nation-State

At the other end of the spectrum there is a group of authors developing a critique of those studies defending the thesis of the decline of the nation-State, referring to the end of the State or the death of State sovereignty. To their critics' eyes, this thesis results from a questionable dualist construction, opposing the global and national levels (the 'outside' and the 'inside'),[48] and analyzing economic restructuring caused by capitalist globalization as if it were a phenomenon that takes place independently and outside the political system (Robinson, 2002); or placing a dividing line between national and global economies – seeing the national and global levels as mutually exclusive- and thus obscuring the analysis and losing the ability to adequately frame the terms of the problem, as it leaves aside and fails to perceive the many political-economic interactions between the nation State and the global economy, generating new institutional frameworks and altering others (Sassen 1999 and 2007).

This trend of thought affirms that, under globalization, States adapt and transform themselves, State authority becomes de-nationalized and the national public governance functions get displaced to private actors, both national and supranational (Sassen, 2007). These authors take some distance from those who tend to see the State as a victim of globalization, to rather state that nation States have undertaken a consistent effort – premeditated or not – that has been key for the development of the global economy

[48] These dualist approaches contrast the global logic of a mundialized economy, prevailing at the economic level, with the State-centric logic of the global system prevailing at the political level (Robinson, 2002).

and for pushing globalization into areas other than the economy. Some authors even state that de-regularization and privatization had not been the result of an imposition by foreign powers on the national State – from the global capital's disciplinary power – but rather were negotiated and generated by the State itself, the constitutional status of those measures being the biggest evidence of the State's active participation in the process.

William Robinson (2002) develops the idea that globalization represents the transition from the nation-State phase of capitalism into its transnational one. A key feature of this phase is the subrogation of nation States to the organizing principle of capitalism and, with it, of the entire inter-State system as the institutional framework for capitalist development.[49] Economic globalization not only has its counterpart in the transnational class formation but also in the formation of a transnational State, understood as a set of political and economic practices and institutions, formal and informal, that sustain, defend and help advance the emerging hegemony of a global bourgeoisie and of its project to build a new capitalist global historical bloc. In the emerging transnational State – still in its embryonic stage – nation States do not disappear or lose power but transform themselves and change their functions to integrate into this structure, together with a set of political and economic institutions that are global and regional in nature.

Nation States decline functions in favour of transnational powers while assuming others, but their transformation is not only the result of external impositions or of their realization that they have no margin to manoeuvre before globalization. States re-structure themselves to serve the global capital because transnational social forces in the capitalist global bloc – represented by local forces that have joined in the global economy – capture the local power structures, creating the necessary conditions for internalizing the authority structures of global capitalism. In this new framework, where State practices are progressively being harmonized with those of global capitalism, nation States displace their functions in the formulation of national policies towards the management of those policies defined by transnational capital through its network of relationships and through a constellation of economic institutions and supranational policies.[50]

Saskia Sassen also holds the thesis of State sovereignty being adapted and transformed under globalization. Just like other authors from schools of thought different from hers,

[49] Robinson develops arguments to prove that the nation-State constitutes a historically specific form of capitalist development, corresponding to the period that starts with the Westphalia Peace Treaty and ends in the late 60s and that is known as "national capitalism". Under the Dutch hegemony (that was then a proto nation-State) and in the framework of the Westphalia Treaty (1648), the principle of State sovereignty was established for the first time.

[50] See Robinson, 2002 parts I, II and III.

she believes that economic globalization constitutes a transformation in the organization of political power, and particularly of State sovereignty as it was known until now. For Sassen, the main dynamics at play in the global economy have the capacity to pulverize the intersection of sovereignty and territory that lies at the core of the modern State and the modern inter-State system (Sassen, 1999).[51] Her main argument is that the nation-State is immersed in a process of partial de-nationalization[52], many times subtle and hard to identify, as a result of which some strategic elements of State sovereignty – particularly those creating the institutional space for the core dynamics of globalization – have been displaced towards supranational institutions, non-governmental and private bodies (Sassen, 2007).[53]

Nation States had negotiated this cession as a way to avoid losing power and to be able to take part in globalization; this process allowed globalization to have a territorial and institutional insertion in national spaces. Here nation States are instruments – coercive and of collective action – needed to achieve the materialization of global economy in the national territories and even though their topography oscillates between the virtual space and those territories (Sassen, 2007), the global capital needs to negotiate this materialization by transforming the institutional framework of those spaces, that is, the exclusive jurisdiction of the nation-State on the territory.

In this process, the State has not been a passive actor or a victim. On the contrary, it has been a key and active actor, from the moment in which it appropriated its new economic roles, legal regimes and transnational practices, legitimizing them through its normative production. Thus, those arguments that see deregulation and privatization as an expression of the declining importance of nation-States or of their loss of power, or exclusively as a result of external imposition or of the State's incapacity to resist the disciplinary power of the transnational capital, need to be relativized.

---

[51] The break of the intersection between state sovereignty and territory is expressed through the fact that the nation-State is no longer the only space where sovereignty and the normative production that goes together with it are articulated. It is also no longer the exclusive subject of international law.

[52] This is a process turning the global programmes of a multiplicity of agents into endogenous entities and is partially channelled through deregulation. For instance, it is through this process that the logic of global capital, operating in financial markets, has managed to be integrated into national public policies as "adequate economic policies" that have become the norm, introduced and mediated by supranational institutions (Sassen, 2007).

[53] The author refers to international economic institutions (WTO, IMF, World Bank), international private bodies (like the International Chamber of Commerce) and human rights bodies in particular.

For Held and McGrew, the political space for the development and achievement of effective governance and control over power is no longer identified with a particular political territory. The forms of political organization now imply a complex de- and re-territorialization of political authority (2007). Linked to global change, driven by globalization, State power is also transformed and this happens to the extent that its roles and functions are recomposed, reconstituted and reintegrated to the intersection of networks and systems that are regionalized and globalized (Held and McGrew, 2007). National sovereignty has not been fully subverted, but merely transformed: it has been displaced as an unlimited, indivisible and exclusive form of public power, embodied by an individual State and inserted into a system of multiple centres of power, usually shared with hidden spheres of authority. In other words, according to these authors, there has been a reconfiguration of political power (Held and McGrew, 2007).

These authors consider that there are solid reasons to assume that the restoration of the States' international order is not viable, but downplay the formulas portraying the modern nation State as unchanged, as well as those exaggerating the loss, reduction or erosion of State power, as if it had been much stronger in former times. In any case, nothing can be said about the future trajectory of globalization. The processes and changes driven by globalization are not, in any way, unavoidable or certain, because globalization itself is a long-term historical process – and, as thus, uncertain – full of challenges and being shaped in a significant way by circumstantial factors (Held and McGrew, 2007).

4.2 Inequality and exclusion[54]

Theoretical elaboration on inequality and exclusion in times of globalization, centres basically on the framework of the debate about the relationship between economic globalization and the nation-State. In general, the debate is placed in the context of the transformations that had taken place at two levels: *in the territorial organization of economic activities*, that implied renewed and different forms of unequal and subordinated countries' integration, and of regions and populations within countries, into global economy; and in the *organization of the political power*, that implied cuts –

[54] According to Santos (2003), as ideal types, inequality is defined as a socioeconomic phenomenon and exclusion as basically a cultural and social phenomenon. Both are hierarchical systems of social integration. Under the inequality system, belonging is marked by subordinated integration (one is below, but still inside), while under the exclusion system belonging is marked by exclusion: one belongs in the system according to the way in which one is excluded. Sexism and racism would be hierarchization models encompassing elements of both inequality and exclusion.

voluntarily or not, intentional or not, substantial or not – in national States' capacity to regulate economic, social and political life in their territories.

With different nuances, all analysis starts from common assumptions. The first is the idea that capital's extraordinary mobility and its ability to reorganize production all over the world, brought with it a global decentralization of production along with a centralization of the management and control of global economy by transnational capital, breaking down national productive systems and integrating them externally and unequally in the new globalized accumulation circuits[55] (Robinson, 2002). The second argues that under this new international division of labour, inequality and exclusion systems have been transformed, subverting the notions of centre and periphery that were applied to countries and expressed the division between an industrialized and developed centre based in the North, and a semi-industrialized and developing centre based in the South. Lastly, the third states that the model of social regulation for capitalist modernity, that had the nation State as its main actor and relied on mechanisms that allowed it to control and maintain social inequality and exclusion within socially acceptable limits, has been thrown into a crisis by globalization (Santos, 2003).

Boaventura de Sousa Santos analyzes the way in which modern capitalism's social regulation articulated the inequality and exclusion systems into a hierarchical system of belonging that operated through mechanisms centred in the nation-State, allowing a controlled management of those inequality and exclusion processes produced by the capitalist development itself,[56] and attributes the crisis of this model – that resulted in the transformation of the inequality and exclusion systems – to the erosion of the States' social regulation powers caused by globalization. This transformation has also taken place both in the global and local space-time[57] (Santos, 2003).

Under the conditions of the new international division of labour, based on the globalization (de-centralization) of production, the inequality system seems to have been metamorphosed[58] into a copy of the exclusion system (Santos, 2003). In the capitalist

[55] These circuits are controlled by transnational actors operating globally. The transfer of capitalist accumulation sphere into the global space entails massive re-distributions of revenue and wealth from communities of all kinds towards capitalist agencies controlling the global market.

[56] The social regulation model was formulated at the national societies' scale: it relied on the Welfare State, that was basically aimed at managing inequality through employment and redistribution policies and through cultural and educational policies whose main goal was to manage exclusion (Santos, 2003).

[57] Global or transnational space-time is identified with the North-South axis for the inequality system, and with the East-West axis for the exclusion system.

[58] Such metamorphosis is partial.

modernity, integration is achieved under the inequality system through labour and this integration in turn serves as the basis for re-distributive policies aimed at mitigating generalized and intolerable inequalities linked to social vulnerability conditions, but as labour – and particularly decent and stable work – becomes more scarce, the integration its guaranteed becomes more precarious. Thus, labour now defines situations of exclusion rather than those of inequality, as it has ceased to be a mechanism for "belonging through integration" to become a mechanism for "belonging through exclusion" (Santos, 2003).

The flexibilization of labour, the segmentation of the labour market[59] – resulting in the social uselessness of a large number of workers – and the precariousness of work and labour – resulting in the weakening of union organizing, pulverize those economic and social rights guaranteed by the Welfare States, making protection against social vulnerability unreal. In this context, work ends up becoming a precarious form of social insertion and the uselessness of a growing number of workers in "the new face of exclusion"" (Santos, 2003).

The transformation of the exclusion system into an inequality one, seems to be happening mostly through cultural globalization, even though it would be more accurate to say that it is happening through the interphases between economic and cultural globalization. What Santos calls "ethnicization" of the labour force as a devalued form of employment, that is clearly expressed in the type of work available to immigrants in global cities and in the incorporation of formerly excluded cultures under de-characterization or vernacularization forms – finding its most extreme versions in publicity and in the global tourism industry – would be an example of how this transformation operates through the interphases between both globalization dimensions (Santos, 2003)**.** In the same way, subordinated integration to the inequality system by social groups formerly confined within the exclusion system – such as Indigenous peoples – seems to be somehow happening through the integration of their territories and knowledge into the capitalist accumulation process, mediated by the biotechnology revolution and by genetic engineering attributing an increasing value to their resources (Santos, 2003).

Most authors agree with Santos on the overall lines for diagnosis and explanations for the crisis of the social model for regulating inequality. The relationship between this crisis and the erosion of social regulation movements centred in national States is an issue

[59] The change in the technical-productive paradigm, fed by constant technological innovation, de-centralization of production (for instance, export processing zones) and the prevalence of those complex and specialized services demanded by the global management of economy, have led to a new and rigid segmentation of the labour market based on the demand for a reduced number of high-skilled and well paid jobs, along with a growing number of low-skilled, badly paid jobs, with no right to social security.

that is present in practically all of the analyses. Among the authors reviewed, Sassen (1999) treats inequality in the framework of the social marginalization and integration taking place in global cities, operating as strategic locations for global economy to materialize itself[60], configuring what she calls a new geography of centrality and marginality.[61] Robinson (2002) and Amin (1997 and 1996) approach it as an intensified form of capitalist polarization taking place in the context of the breakdown of the class agreement (between capital and labour) that held while the capitalist accumulation and reproduction processes remained confined within the nation States' borders. And Bauman (1998) understands it as the expression of a new social stratification resulting from the opposition between the almost unrestricted freedom of movement enjoyed by some – the new global capital and finances elite – and the forced confinement (forced territoriality) of most. He also explains it in the context of the loss of 'space' (the territory controlled by the nation-State) as a structuring force for those social relations marking modern capitalist development.

Sassen considers that the centralized management and control over a series of economic activities and operations that are geographically dispersed requires specialized services (financial, corporative and communicational) as well as a telecommunications infrastructure that has modified the shape of urban economy in global cities while transforming the labour markets. In these cities, the overrating of the activities supporting the management of these operations and the underrating of those linked to the traditional sectors of urban economy,[62] generate huge and growing inequalities in the ability to produce revenue among the different economic sectors and in the capacities of different types of workers to obtain income, reinforcing existing inequalities and mobilizing new inequality dynamics that result in a new geography of urban poverty and marginalization.

---

[60] Strategic locations for the global economy's production are the global cities but also the free export processing zones and the offshore banking centres. Global cities are, according to Sassen, centres for service and funding of trade, investment and operations of international central offices (Sassen 1998). They are also centres for the transnationalization of the workforce.

[61] She refers to the global and regional hierarchization of cities that includes global cities and high-technology industrial districts in the geography of centrality, and large territories growingly peripheral and disconnected from the main economic processes feeding the global economy in the geography of marginalization. Global cities include New York, London, Paris, Frankfurt, Hong Kong, Amsterdam, Los Angeles, Sydney, Buenos Aires, Taipei, Bangkok, Bombay, Mexico City, Tokyo, Singapore and Sao Paulo, among others; within them, this new geography of centrality and marginality also operates (Sassen 1998)

[62] The growth of the internationalized sector of the economy in global cities generates distortions both in valuing economic activities taking place within these cities, the jobs linked to them, and urban space. These distortions are expressed in new forms of polarization resulting from the overrating of activities and jobs linked to the internationalized sectors of the economy, and the subsequent underrating of economic activities and jobs linked to the traditional sectors of urban economy, particularly manufacture and low-added value services (Sassen, 1998).

Some expressions of these polarization dynamics can be found in the revaluation of the urban space where international financial, business and corporate services centres are located, and where the high-income population reside, in contrast with the devaluation and growing deterioration of the spaces where business producing moderate or income-level profits and the low-income population are located. But they are also evident in the growth of a high-income, professional and specialized population, linked to the leading economic sectors (telecommunications, financial and corporate services) in contrast with the increasing uselessness of the scarcely or medium-level skilled labour force in those same leading sectors, the growing demand for low-paid (often, very low-paid) workers and the diminished income for the workforce employed in the traditional sectors of the urban economy[63] (Sassen 1999).

In the global cities' economies[64] it is possible to see a trend towards the growth of the service sector operating through an increasingly segmented and polarized labour market, made up of a highly qualified and high-income sector and of low paid one ensuring the daily functioning of financial and corporate services[65] (Sassen 1998). Feminization and racialization of devalued jobs (employing a low-skilled, unskilled and low paid workforce)[66] is one of the features of the labour market's segmentation in global cities, that has been reinforced by the demographic transition processes that have taken place in economically advanced countries and due to the migration from Third World countries.[67]

In the literature on globalization there are plenty of analyses dealing with the effects of economic globalization on the work and employment regimes, and the consequent inability of labour to function as a social integration mechanism. Different authors agree in pointing out that the transformations that took place in the relationship between capital and labour are the result of the new relative power of capital since it started to break free from the spatial limitations of the nation-State, so when accumulation is displaced to the global space, overcoming those barriers, the capital can afford to abandon all reciprocity to labour, dissolving the notion of its having any responsibility towards it

[63] In 1997, the relation between the income of USA corporation executives and middle-level factory workers was 254 to 1.

[64] The work of Sassen is based on statistical information exclusively from the USA.

[65] The low-paid jobs' infrastructure includes secretaries and office clerks, cleaners, officer couriers and security personnel, among others.

[66] According to Sassen (1998), services with low added value and urban manufacture are the sectors where women and immigrants are the majority of workers

[67] The author devoted a quite extensive analysis to the restructuration of urban economy in global cities, as well as to the restructuring of labour markets.

(Robinson, 2002; Amin, 1997; Bauman, 1998). The results of this are precarious and deregulated labour system (like temporary outsourced, part-time, piece, informal, home-based work) that are functional to the flexible post-Fordist accumulation,[68] and lead to ways of levelling salaries downwards, to non-unionized jobs that are also deprived of social security, the extension of the workday and the emergence of a growing number of workers that are not useful to the system and of new gender and racial hierarchies among workers (Robinson, 2002).

Samir Amin presents an interesting reflection about the future of capitalist polarization in the global scene.[69] For this author, polarization is intrinsic to the system, but the difference with previous periods is[70] the use of five monopolies of which countries placed at the centre benefit: *technological monopoly*, because only rich countries can afford the huge expenses resulting from a permanent process of technological innovation; *the control over global financial markets,* highly efficient thanks to market liberalization and deregulation; *monopolic access to the planet's natural resources*, that is made possible by the technical and economic resources of developed countries for its exploitation; *monopoly over media*, opening the doors to political manipulation and the spread of cultural uniformization patterns; and the *monopoly of massive weapons of destruction.* In this new context, the industrialization strategy, in which the development processes followed by the peripheral countries in past decades relied, had ceased to be an eventually efficient mechanism to reduce the gaps separating them from the developed countries placed at the centre of the system.

4.3 International migration

The study of the connections between economic globalization and population mobility has given place to an important literature suggesting a critical review of classic approaches applied to analyzing international migration. Canales and Zlolniski (2001)

[68] "Fordist" production is the large scale, industrial mass-production, in which all the phases of the production process were centralized. In contrast, "post-Fordist" production refers to a flexible and decentralized process, in which most of the processes required by production are outsourced to providers and related companies, and only the work needed for coordinating and controlling production is retained by the main corporation.

[69] See Amin, 1999.

[70] In the post-war age, global polarization was expressed through the existence of an industrialized and developed centre, and a semi-industrialized and under-developed periphery. It was thought then that the development and welfare ideal will be achieved through industrialization. Thus, Third World countries were eager to engage in industrialization processes to diminish the gap separating them from the developed countries at the centre of the system and eventually reach their same status.

differentiate three types of migration in traditional literature: temporary migration, that implies displacement without changing the permanent residence; permanent migration, that implies a definitive change in permanent residence; and diaspora, that might imply (or not) a change in permanent residence and usually, though not exclusively, is linked to forced displacement situations that historically have been associated with political, religious or cultural harassment.

Different studies point out that the categories of "temporary migration" and "permanent migration" are now insufficient to understand the forms and features that the migratory process has acquired since the deepening of economic globalization. In the 19th century and the first quarter of the 20th century, European migrations towards North and South America – that, under the classic scheme, were studied and qualified as "definitive migrations" – constituted the basis for the thesis explaining changes in the relationship between the communities of origin and destination of the permanent migrants by the assimilation process that eventually ended in the dissolution of the migrants' links with their communities and countries of origin and their complete cultural, social and political insertion in the destination countries. For the same reasons, but in the opposite sense, temporary migrations and those known as continuous or circular population flows from and towards its communities of origin, defined settlement patterns impeding their assimilation to the destination communities and countries, because the migrants stayed permanently in touch with their communities of origin, thus preserving their sense of belonging to them (Canales and Zlolniski, 2001, referring to research by Smith).

By the end of the 80s, critics of this approach generated theoretical thinking basing their analysis in what today is known as "transnational approach" to migrations. This approach uses the notion of "transnational communities" and, linked to it, those of "transmigration" and "transmigrant", to explain the new patterns of migration and settlement of migrant populations since globalization and to respond to the dislocation and destructuration of traditional notions of community,[71] migration and migrant that had formed the basis for previous theoretical elaboration and empirical studies of international migration (Canales and Zlolniski, 2001).

Applied to migrations, the notion of transnational community defined at first a migrant community reaching and consolidated beyond and in spite of the nation-State borders (Besserer, 1999). Today, transnational communities are defined as new social spaces, transnational and de-territorialized spaces that are not disconnected from the

[71] As understood in its spatial or territorial meaning and dimension.

communities and countries of origin, nor assimilated to the communities and countries of destination. In reference to the work of Glick and Schiller, Besserer (1999) says that transnational migration encourages and maintains multiple relationships linking the societies of origin with the settlements in the destination country, and shaping communities that are simultaneously placed in more than one society. In other words, these are pluri-local social spaces articulated through a complex system of exchange and circulation networks for people, money, goods, information, images and values, enabled by the extraordinary development of information and communication technologies that tends to transform migrant settlements and their communities of origin into a single large community spread through multiple locations (Canales and Zlolniski, 2001 and Besserer, 1999, in reference to Rouse).

Together with other authors, Canales and Zlolniski argue that transnational communities constituted a dense system of social networks that are dependent on kinship, friendship and community identity links and relationships, based on trust, reciprocity and solidarity, protecting their members against the situations of social and political vulnerability affecting them.[72] They constitute a dense social fabric that is consolidated, reproduced and transformed in the framework of a complex interaction of relationships between them and their communities of origin and of settlement in the destination country.

To the extent that transnational communities operate as a bridge linking communities and societies of origin with those in the settlement place, under certain conditions the communities of origin are also transformed. There are case studies revealing the magnitude and depth of this transformation. Canales and Zlolniski have studied the Mexican migrant communities in the USA and they point out that as a result of the close dependency of the Mexican communities of origin to the USA labour markets and their links with the social and daily lives of the Mexican migrants' settlement places, a sort of "Northernization" of the communities of origin has taken place. The flow of symbolic and material goods (particularly of remittances) from transnational communities can end up being more important to communities of origin than their exchanges with neighbouring communities and Mexican society.[73]

[72] However, the social networks of transnational communities do not constitute a community model that is exclusively protective as they also tend to generate and reproduce forms of social inequality (Canales and Zlolniski, 2001).

[73] These authors also analyze the links between Mexican migrants in the USA. Their analysis contributes with interesting ideas on the Mexican migrants' organized responses to the conditions imposed by globalization in their communities of origin and destination.

Migratory movement is usually explained from attraction and expulsion factors, basically linked to economic conditions that act as motivations in the individual's decision to emigrate. Migration studies, particularly those of an economic and demographic nature, identify unemployment and poverty as the main expelling factors, while employment opportunities and better remunerations are the most important attraction factors.

In a recent work, Saskia Sassen (2007) argues that an analysis based exclusively on identifying and characterizing attraction and expulsion factors is insufficient to understand the dynamics that underlie international migrations under globalization. Globalization creates points of contact between economically advanced countries and under-developed ones, that translate to symbolic and material conditions that turn migration into an option. These conditions also explain why in certain cases poverty, unemployment and under-employment become factors for expulsion.

The patterns that migration flows follow under globalization reproduce features that can be found in previous massive migration processes – such as European migrations to the American continent in the 19th and early 20th century – as well as in new ones. Sassen considers that there is a geoeconomy of migration and identifies three kinds of conditions that, along with poverty, unemployment and over-population, facilitate or drive migratory flows:[74] political and economic links previously established between countries of origin and destination (colonial, neocolonial, military); links generated between them in the framework of economic internationalization and decentralization (direct foreign investment, export processing free zones, development and foreign aid programmes in the countries of origin, as well as organized or informal hiring of legal or illegal migrant labour by corporations from economically advanced countries or promoted by their governments to cover a workforce deficit); and organized exportation of legal and illegal labour force (facilitated by workers' recruiting agencies, organized mafias and the governments in countries of origin).[75]

---

[74] Sassen's work is based on empirical studies analyzing migratory flows towards Japan, USA and Europe. The complete elaboration of her arguments can be found in Sassen 1998 (Chapter 2); and, Sassen, 2007 (Chapter 4). For this author, the development of economic, political and cultural links between the countries of origin and the countries of destination tends to directly or indirectly promote emigration. Both the old (colonial) and new (post-colonial) links, military presence or direct foreign investment, as well as manufacturing in export free zones shape a geo-economy of migration explaining intensive migratory flows from and towards certain countries.

[75] One of the main explanations for the interest of governments in exporting labour, as well as their lack of interest in discouraging or stopping it, lies in the volume of resources represented by the remittances sent by immigrants to their families in their countries of origin. The World Bank estimates their value as 232 billion dollars for 2005. The economies of some countries are dependent on these remittances; in most cases they constitute a revenue that the country can not do without, as well as an alternative income for families alleviating

Migration flows that are initially driven or facilitated by the conditions identified by Sassen, end up becoming autonomous and running outside those conditions, foreign to the previously established links between countries of origin and destination. They grow and develop outside and in spite of the limitations and restrictions that those who started them will later try to impose. When migration reaches a certain critical mass, that is a significant presence in the countries of destination, autonomous migratory flows develop, relying on migrant networks held together by kinship, family, friendship or neighbouring relationships. In this way, migratory flows enter a stage that some authors call "chain migration".

Transnational communities acquire a special meaning in the context of chain migration. By creating transnational social networks and operating as a mechanism that articulates the communities of origin with the settlement places, they facilitate information exchanges on employment opportunities and salaries, as well as contacts that translate into the search and identification of jobs in the settlement places, assistance to circulate from one place to another and coverage to minimize the risks of displacement and the costs of settlement and work insertion.[76]

In the literature on globalization we often find references highlighting the restrictions applied to the circulation of persons as opposed to the almost unrestricted freedom of movement enjoyed by capital thanks to market liberalization. Cross-border labour movement takes place in the framework of a sort of dislocation between regulating migration – that remains in the political and normative domain of nation-States – and the partial denationalization of important portions of State sovereignty that play in favour of transnational capital and has implied the transference of their regulatory functions into multilateral and private supranational institutions.

Sassen[77] explains that, in contrast with the open responses that national States in the advanced economy countries demand from others in relation to capital flows, their immigration policies remain focused on outdated notions of border control and migratory regulation: border-less economy is juxtaposed to border controls aimed at keeping immigrants out. They place on the shoulders of individuals the weight of the responsibility on the decisions to migrate and see themselves as passive agents of

the social pressure that the demand for jobs in situations of structural unemployment constitutes for the government.

[76] See the work of Canales and Zlolniski, 2001, and Sassen, 2007 (Chapter 4).

[77] See Sassen 1998.

emigration. However, the geographical pattern of migrations shows the huge influence of the main destination countries in inducing migratory flows. For the author, international migration is explained to a large extent by the actions of governments and the main economic actors in destination countries.

There is a sort of double standard expressed in an open regime encouraging the migration of highly qualified professionals from developing countries, while a strict regulation persists for non-skilled labour migration. Thus, a new stratification of migration is taking place, now based on education, that results in social and economic inclusion of a privileged sector of high-income immigrants and the marginalization of the majority of immigrants – usually illegal – who survive on low salaries, precarious conditions and no social security. Free trade agreements operate in the context of globalization as mechanisms freeing from restrictions the circulation of those professionals required by international economy and subjecting to the application of rigid migratory policies the displacement of those who are not needed nor functional to those operations. In this regard, the United Nations Fund for Population pointed out in a relatively recent study that "Most rich countries are receptive to immigration of highly skilled personnel and even encourage it, but they hold ambiguous or negative views on the labour force they need that is placed at the lowest end of the scale (UNFPA, 2006).[78]

The United Nations Global Commission on International Migrations[79] have estimated migration for 2005 in around 200 million people, including legal and illegal migrants, as well as refugees.[80] At the global level, it is estimated that the number of illegal migrants oscillates between 30 and 40 million people (UNFPA, 2006). Among the refugees,[81] almost half are women and girls[82] and among those emigrating for other reasons the number of women is increasingly important. According to the United Nations,[83] about 50%

[78] It is estimated that between half and a third of specialists in science and technology from the developing countries lives in the developed world. For instance, by the year 2000 it was estimated that "more than 70% of the highly educated population from Guyana, Haiti, Jamaica, Trinidad and Tobago was living in an OECD member country" (UNFPA, 2006).

[79] "Migration in an Interconnected World", New York, 2005.

[80] In any case, it is important to mention that against a widely held belief, the proportion of migrants has increased by at least one percentage point in the last 40 years: in 1960 they represented 2.5% of the total world population and by 2009, 2.9%. What is most remarkable is that almost ¾ of the demographic growth in developed regions in the period 2002-2005 is due to net migration (UNFPA, 2006).

[81] Until 2006, the number of refugees surpassed 14 million people, according to the ACNUR report "Global trends on Refugees 2006" published in June 2007. However, their proportion in the total number of migrants has diminished: in 2000, refugees constituted 7% of all migrants while in the early 90s they were 11%. It is also estimated that 90% of refugees live in developing countries. (UNFPA, 2006).

[82] See ACNUR, 2001.

[83] UNCHR: *International Migration and Development*: *Report of the Secretary-General*. 2006

of immigrants are women and the number of women emigrating to developed countries surpasses that of men.[84] There is also a growing trend of women migrating independently. The expansion of demand for low-salaried workers in the big cities of advanced economy countries provides the conditions required to absorb the immigrant workforce, particularly female. Saskia Sassen (2003) points out that there is a relationship between technological transformations in the work processes underlying manufacturing and administrative activities, urban economy's displacement towards the service sector and the feminization of the workforce. Even though her study is based on information for the USA, her findings show trends that can be useful to understand the processes taking place in other advanced economy countries that are migration destinations. According to this author, the participation of immigrant women in the workforce continues to be slightly lower than that of men, while their occupational concentration is far more pronounced, as more than half of immigrant women are concentrated in two jobs – as factory and domestic workers – doing unskilled manual labour, while a small percentage of the women hold professional jobs.[85] A relevant factor is that the conditions of illegality under which many of them live, encourage their insertion in the informal sector (through sweatshops and as subcontracted home-based workers).

Sassen also reviews extensive literature showing how women's access to regular paid work and other public spheres has an impact on gender relationships, but she also points out that in the case of migrant women there are two specific scenarios. These women are very active in dealing with public and private welfare institutions (they negotiate their families' legal vulnerability by seeking public and social services for it) as well as in the community, positioning themselves in a way that is different from that of men in relation to the State and the economy. In this context, Sassen provides empirical information indicating that women's incorporation into the migration process reinforces the probability of definitive settlement in the countries of destination, unlike the pattern in male-only migrations (saving up to return to the countries of origin).

Among other case studies, the one elaborated by Emma Martín (2008) on Ecuadorean and Moroccan migration to Spain confirms the above described trends in three senses: a) immigrant labour is absorbed by the sectors with the lowest productivity and salaries, that are the fastest growing in terms of employment; b) migrant women work basically as

[84] Sassen (2003) points out that in the 70s women were already representing more than 50% of the total number of migrants to the USA. According to official data, 60% of the Filipino migrants were women; as well as 62% of South Koreans, 53% of Chinese, 52% of Dominicans and Colombians, 53% of Haitians and more than 50% of Mexicans

[85] Between 9 and 10%, according to data from the 80s (Sassen 1998).

paid domestic labour, an occupation that according to Martín is currently a real "labour mine" that develops outside legal work and influences the transformation of migratory strategies, encouraging the priority for women over men, as it is easier for the former to

find stable jobs;[86] and c) the creation of transnational social networks acting as bridges through which information and money circulate, favouring family reunion and work placement in the countries of destination.

The available information for different regions and developed countries indicates that domestic service is one of the main sectors driving female international migration for work purposes (UNFPA, 2006: 25).[87] The growth in demand for this kind of service is directly related to the increase of women working, the ongoing growth of the elder population, social protection systems' reforms resulting in a decrease of social services provided, and the low salaries prevailing in the sector that allow middle or even lower-income level families to hire full or part time domestic and care help.

5. THE CULTURAL DIMENSION OF GLOBALIZATION

In the context of what Santos (2003) calls the "cultural switch"[88] of the 80s, the study of globalization's cultural dimension becomes very important. As the interest in causal explanations of social life was rekindled, globalization studies began to question the role played by the cultural dimension in explaining globalization and its effects. The debate on this aspect moves between two extremes. For some, the cultural dimension of globalization plays a secondary role in relation to the integration of capitalist world economy, while others consider that cultural globalization and the institutionalization of values and norms precede and in a way act as conditions and vehicles for such integration (Santos, 2003).

[86] According to the author, the significant increase in the offer of paid domestic work in Spain is linked to the transformations that are taking place in the configuration of the Spanish social unit. She also attributes them to three factors: the increasing incorporation of women into labour markets, the increase in single-parent and "assembled" families, and the increase in life expectancy, combined with the growth of the elder dependent population in need of care.

[87] According to UNFPA, "Domestic workers constitute up to 60% of all domestic and international migrants from Latin America" and most migrate to North America and Western Europe. In Spain, about 70% of working migrant women – most of them originating from South America – are employed as domestic help or for caring for others (UNFPA, 2006: 51).

[88] Santos (2003: 187) defines it as the process by which the emphasis on studying socio-economic phenomena gives way to a focus on cultural phenomena.

Among the studies reviewed, it is worth highlighting those that place at the centre of the debate what is usually presented as the tension – evident for most authors – between cultural globalization's homogeneizing and heterogeneizing tendencies[89] and, as a related debate, an unfinished discussion about the emergence or not of a global culture.

5.1 Cultural homogeneization vs. cultural heterogeneization: towards a "global culture"?

Most authors discuss the persistence of a certain discourse that is part of the mythology of globalization, according to which it would be expressed by the victory of culturally homogeneizing forces over all the others (Robertson, 1995).[90] According to Robertson, the over-simplification would be the result of having presented globalization as a consequence of modernization,[91] and of not having paid enough attention to the close links between spacial and temporal dimensions of human life. That is why he prefers to use the term "globality"[92] instead of "globalization", as the idea of globality goes beyond the debate opposing the ideas of global homogeneization and heterogeneization.

Theoretical reflection that considers that the opposition between cultural homogeneization and heterogeneization is a false tension or polarization, states that this perception is a result of seeing the global and the local as two separate and mutually exclusive spheres. In this context, the local is perceived as a form of opposing or resisting what is globally hegemonic, and it is assumed that affirming the local – or the community – implies a clash between "subaltern universals" and the "hegemonic universal" of the dominant cultures (Robertson, 2000). In fact, the global and the local interact with and influence

[89] This debate is related to the current controversy on "universalism" versus "particularism".

[90] To a large extent, the discourse on globalization has been built on the premise that it is a process to overcome the local, understanding as local basically the national. The idea of locality is not necessarily equivalent to nationality. In terms of space, a rural community can be local in relation to a regional society, as a regional society can be considered local in relation to the national community.

[91] The theory of modernization was initially developed by US scholars in the 60s and 70s. Modernization also implies changes in the political, economic, social and cultural spheres at the global level, from the exportation of ideas, values, techniques and institutions produced in the West but also implies, at least in theory, an open and ongoing interaction process that shapes alternative models sharing common features while also containing their particularities. There is an intellectual and activist sector that sees this theory as a renewed form of colonial or imperialist discourses, operating under the assumption that everything Western is better or superior. In this case, the West stands for civilization and progress, while everything outside it is related to backwardness and barbaric practices. The theory of modernization also tends to forget that what is presented as "Western civilization" is not a monolithic bloc.

[92] For this author, "globality" – and not globalization – is the general condition enabling the spread of a generalized modernity. Thus, globalization must be seen as the interpenetration of geographically differentiated civilizations and not as a consequence of modernity.

each other. The global is not beyond and above localities and the local, as a construction, is also subjected to extra or trans-local processes (Robertson, 1995).

The local community is no longer defined by face-to-face communication or by the space containing it. The idea of space-time, as structuring sociocultural wholes (local, regional or national) has started to lose importance as the technological development in means of transportation and communications since the Industrial Revolution enabled the international flow of information, goods and people, allowing more frequent and long-distance contacts between those inhabiting geographically separate locations. The current technological revolution[93] — the development of telecommunications and micro-electronics – makes it possible to take the argument of the inefficiency of space-time to configure and contain socio-cultural wholes to an extreme. New technologies have not only managed to break the primacy of the geographical space to define culture (Castro Gómez, 1998); but also have the power to undermine and erode those wholes, by depriving the territory of its value and its ability to confer an identity (Bauman, 1998).

A community's references for identity and belonging (like language, nationality, territory or motherland), carefully built and guarded by national States to guarantee – real or fictitious – social loyalty and cohesion and proscribe dissident political and cultural claims, have been weakened by a series of factors, but the technical transformations allowing transnational forms of communication, with the nation-State no longer being able to play an intermediary and central role, have a central place in this process. Arjun Appadurai (1996) elaborates extensively on this aspect. According to him, the new electronically mediated forms of communication have began to create a sort of *virtual neighbourhoods*,[94] that are no longer linked to or limited by a particular territory, passport or any other political feature, but by the access to electronic infrastructure and equipment as well as by the knowledge and skills required to connect to international information networks. The morphology and longevity of these neighbourhoods is hard to determine but it is clear that they constitute a new type of communities, exchanging information and building relationships affecting many areas of life, from philanthropy to marriage and able to mobilize and circulate ideas, opinions, money and social links that many times end up landing in lived neighbourhoods in the form of cash money flows, weapons for local nationalist movements and support to specific and highly localized positions in the

[93] Bauman says that with the implosion of communication time and the reduction of the instant to magnitude zero, space and time indicators lose their importance (Bauman, 1998).

[94] Such as those created around the Internet. The author uses the term "neighbourhood" in a broad sense, as synonymous with "community".

public sphere (Appadurai, 1996). What is not yet clear are the effects that the dislocation between material – localized in a territory – and virtual neighbourhoods might have in the process of producing the local.[95]

The debate on the existence or not of a global culture is permeated by arguments in favour and against, even though most authors deny the existence of such culture. The background issue here is the relation between cultural homogeneization and heterogeneization as a result of globalization. The idea of a "global culture" refers to cultural homogeneization processes that are extensive and generalized, if understood in a strong sense – like Tomlinson affirms – as a unique culture encompassing absolutely everybody on the planet and replacing the diversity of cultural systems that have flowered until then (Tomlinson, 1999). So defined, it is evident that such a culture has not yet arrived, even though it can not be discarded as a possibility that might take place in the future (Tomlinson 1999).

Many have assumed that the dramatic intensification of cross-border flows of goods, capital, work, people, ideas and information created convergence, isomorphisms and hybridizations between the different national cultures, but most authors consider that, in spite of their importance, these processes are far from leading to a global culture (Santos, 2003). Robertson notes that even if global culture is understood as constituted by the progressive interconnection of many local cultures, big and small, he does not believe that those connections can exhaust it. He also warns that no equivalence should be made between the connection and interaction between those cultures and the idea of cultural homogeneization.

In the framework of the debate on global culture, there have also been attempts to respond to the question if what exists is not rather an "Americanization" or "Westernization" with a homogeneizing vocation, as the values, cultural goods and symbolic universes being globalized are Western or rather specifically from the USA (Santos, 2003). However, there are case studies showing that the penetration of US culture and, in general, the spread of Western culture has been only partial and into selected areas. A relevant fact is the existence of important geographical spaces where the cultural influence of Japan or India, for example, has been visibly stronger and much more efficient.[96] This is why a growing number of scholars prefer to refer to several globalizations and not just to one. Most of them also note that to uncritically accept the thesis of a homogeneizing "Americanization" or Westernization would imply that audiences are unable to reflect, filter or interpret in a differentiated manner the cultural messages they receive.[97]

[95] See Appadurai, 1996.
[96] There is plenty of empirical evidence presented in Berger and Huntington, 2002.
[97] See Santos, 2003.

It is particularly symptomatic that the discourse on "Americanization" as a supposedly hegemonic form of an emerging global culture awakens old sensitivities and rekindles the old ideological discourses organized to expose and resist all the known forms of cultural colonialism and imperialism.[98] Tomlinson notes that the argument of the "Americanization" of culture, even more than the one on its Westernization, quickly invokes the threat of cultural imperialism in debates on the definition of cultural policies by national States[99], revealing the huge and inexhaustible sensitivity around these issues in the cultural discourses of 20th century societies.

In the theoretical debate on contemporary cultural globalization, the perspective of cultural imperialism is also present. Tomlinson explores in depth and criticizes the thesis of what he calls the "global capitalist monoculture", referring to those analyses that assume the position of a cultural imperialism (basically from the USA),[100] and assign to transnational capitalism the ideological power to define world culture in the sense that the incorporation of all national cultures to the capitalist system raises a comprehensive capitalist culture (1999).[101] He points out that it is impossible to deny the success of capitalism as an economic system, or its power to organize and structure a good portion of modern cultural life into narrow economic patterns (like the trend to commercializing cultural experiences in modern societies, of which consumerism is a symbol),[102] but this is not sufficient basis to affirm that a "homogeneized" hegemonic culture is on the raise. Even if the existence of this trend towards the commodification of life and culture, expressed through an excessive consumerism, is accepted, it is impossible to extrapolate the cultural experience of basically developed societies to others in which extreme and overspread material inequalities make daily consumption not a seductive or aestheticized experience but rather a practical and utilitarian one for the majority of people.

---

[98] Cultural imperialism includes a series of easily identifiable discourses on domination: that of the USA over Europe, of the West on the rest of the world, of the centre over the periphery, of the modern over the traditional world – that is quickly disappearing – of capitalism over practically everything and everybody. (Tomlinson, 1999).

[99] He gives the following example: during the GATT Round held in Uruguay, 1993, European countries – particularly France – demanded that the trade in audiovisual materials was exempted from the agreement to be able to restrict the flow of films and TV shows into their countries. This demand is part of a cultural protectionist idea that was strongly rejected by the USA. An analysis of the Europrean protectionist policies in the face of the threat that Hollywood represented for its cultural policies, particularly in France and Great Britain, can be found in the work of Armand Mattelart, 2006.

[100] Seen as cultural penetration

[101] He refers to a current that is particularly strong in the critical analysis of transnational communication media.

[102] According to Tomlinson, it is impossible to deny the fact that some styles, brands, tastes and usages have global acceptance and can be found almost everywhere in the world, but to state that the mere presence of certain cultural products and texts in local spaces is an irrefutable proof of the general convergence towards capitalist monoculture would be to hold a pretty poor view of culture (Tomlinson 1999).

Culture, understood as an existentially significant symbolization and experience, is not transferred in a linear way: the movement between cultural and geographical spaces always includes interpenetration, translation, mutation, adaptation and indigenization, to the extent that a receptive culture uses its own resources to exert a dialectical influence over cultural imports (Tomlinson, 1999, in reference to the works of Appadurai, Lull and Robins). Moreover, Tomlinson states that today relatively few people would cling to the idea that hegemony is packed in Los Angeles, couriered to the global village and unpacked in innocent minds. (Tomlinson, 1999, this reference is taken from Liebes and Katz).

The evidence offered by a growing number of empirical or case studies show that "cultural homogeneization" and "heterogeneization" are two mutually implicated trends, that produce differentiated situations and responses in both directions through their interconnection. For instance, Appadurai (1996) points out that the argument of growing cultural homogeneization forgets that as soon as the forces from different metropolises manage to penetrate other societies, are soon acclimatized and nationalized in different ways, but what still remains unclear – because it is just beginning to be systematically explored – is the dynamics of this acclimatization. In relation to Latin America, Castro Gómez (1998) states that the traditional space for cultural production forms is often reinterpreted through strategic interphases with the global or through "entering and leaving" modernity (in reference to García Canclini).

Robertson points out that there is "virtually overwhelming" evidence proving that local groups absorb the communication originating from the centre (developed countries in general) in different ways; secondly, that the main producers of "global culture" – like CNN and Hollywood – acknowledge the existence of a differentiated global market for which there is a need to design differentiated products;[103] thirdly, symbolic resources originating at the centre that appear to be national are subjected to differentiated global consumption and interpretation;[104] and fourthly, that there is an ongoing flow of ideas and practices moving from the Third World towards societies and regions considered to be dominant.

The processes through which the global and the local interact in the cultural field and that result in adaptations, acclimatizations, nationalizations, translations, mutations and

[103] This adaptation strategy is what Robertson defines as "glocalization" (diversity sells). It is not simply a response to the existing global variety, as if that variety existed on its own. According to Robertson, glocalization brings with it the building of increasingly differentiated consumers, the invention of "consumer traditions" of which the clearest example is tourism, the biggest industry in the current world.

[104] Shakespeare, for instance, no longer belongs to England but has a universal meaning. His plays are produced and culturally interpreted in a variety of ways: Robertson says that there is one Shakespeare representing Englishness and another one of global-local relevance (Robertson, 1995).

others, are basically described in terms of "glocalization"[105] and "cultural hybridization". The term glocalization is used by Robertson and other scholars to point out that globalization produces both homogeneity and diversity,[106] while "hybridization" comes from a school of analysis originating from Third World – and basically Latin American – experiences relying on the dynamic interaction between external cultural influences and local cultural usages (Tomlinson, 1999).

García Canclini understands as hybridization those socio-cultural processes by which discrete structure or practices, that existed separately, are combined to create new structures, objects and practices (2000) and refers to "hybridization cycles", as the discrete structures are not pure sources but the product of previous hybridizations.[107] For this author, hybridization best expresses the current processes of interaction between the global and the local because it encompasses the traditional notions describing the contacts between cultures, such as *mestizaje*[108] (a foundational process for Latin American societies) and syncretism,[109] as well as other modern mixtures between handicraft and industry, cultured and popular, written and visual expression in media messages (2000). He also calls our attention to the fact that hybridization is not always a peaceful process, as it can be rejected. Such rejection does not originate only with fundamentalist forces opposed to religious syncretism and intercultural *mestizaje*: there are resistances to accept these and other forms of hybridization because they create insecurities in cultures and conspire against their ethnocentric self-esteem (2000).

5.2 Case studies: multiple globalizations and differentiated responses at the global and local levels

In the context of a pretty representative set of case studies,[110] including Chile, China, Germany, Hungary, India, Japan, South Africa, Taiwan and Turkey, the findings that emerge uphold the thesis that the interaction between the global and the local produces

[105] Glocalization can also take the form of hybridization.

[106] According to Robertson, globalization contains a multiplicity of glocalizing projects.

[107] These cycles describe the transit from more heterogeneous to more homogeneous forms and then to others that are relatively more heterogeneous, without any of them being pure or fully homogeneous (García Canclini, 2000, referring to the arguments of Brian Stross).

[108] The fusion between the "European" and "native" elements both in a biological and cultural sense.

[109] In a broad sense, refers to the simultaneous adherence to several belief systems, not only religious (García Canclini, 2000).

[110] The study was conducted over three years, under the direction of Peter Berger and Samuel Huntington.

differentiated responses that can only be captured in empirical studies and can hardly be subjected to generalization.

On the basis of a set of processes or phenomena resulting from cultural globalization, this study analyzes to what extent the responses generated at the local level confirm a certain typology describing the consequences that the intersection between the global and the local can bring about. Such a typology includes four different situations: a) the local culture is substituted by the globalized culture (selective homogeneization); b) global and local cultures coexist, without significant fusions taking place; c) a synthesis between the global and local cultures occurs; and d) global culture is rejected.[111]

The processes explored in the case studies are also four: 1) the international business culture (also known as *Davos culture*); 2) popular culture (called *McWorld culture*); 3) global intellectual culture (described as the *international faculty club culture*) and 4) the culture of social and religious movements, basically represented by human rights, feminist and new religious movements.

In the summary of the study's findings, Berger (2002) argues for the existence of an emerging global culture whose origin and contents are strongly North-American, that is basically spread through popular and elite culture. The term "elite culture" refers, in this case, to the international culture prevailing in the business and politics realm, as well as to the intellectual culture that sometimes merges with the business culture and in other cases clashes with it. Intellectual or *faculty club* culture is circulated through academic networks, NGOs, philanthropic organisations and even governmental and inter-governmental bodies. For the study's aims, popular culture is the most evident manifestation of an emerging global culture, even though the existence of differences – that in some cases are significant – in the way in which local cultures position themselves before it is also documented. Lastly, and also with important differences, the international outreach of religious, secular and social movements of different kinds (some of them linked to the international intellectual culture), or of what some authors have called "ecumenical movements", has also carried with it the emerging global culture.

The ways in which the emerging global culture interacts with the local culture implies forms of localization differing in their outreach and resulting in cultural hybridization (a deliberate effort at producing a synthesis between the local and the foreign) and, on

[111] For the aims of this study, "culture" is defined in its conventional meaning as the set of "beliefs, values and life-styles of ordinary people in their daily existence" (Berger, 2002).

many occasions, in the revitalization of local cultures. As a general rule, global culture is accepted but with significant local modifications (Berger, 2002).

All these ways of responding to global culture are cross-cutting to the elite and popular culture and reveal the absolute exaggeration of those who attribute an unavoidable homogeneization force to cultural globalization. Cultural globalization produces both homogeneity and heterogeneity; the former operates in a selective way and the trend is rather towards heterogeneization. Also, the type of response depends to a great extent on the cultural resources available to local cultures. According to Berger (in reference to Huntington) there are "strong" and "weak" cultures (Tulasi Srinivas uses the term "dense" for Indian culture). These categories are used to refer to the differences among the different cultures in terms of their capacity to adapt in a creative way: cultures of East and South-East Asia, particularly those of China, India and Japan, have been particularly strong, while the African and some of the European cultures have been relatively weak (Berger, 2002).[112]

There are also forms of subglobalization and alternative globalizations. The European is the most representative form of subglobalization (Europe's europeization is seen as a form of response to the US driven globalization) and its most interesting specific feature is the link between europeization and secularization but there are also other subglobalizations in East Asia, like the one represented by the huge spread of Japanese popular culture in Taiwan, among others (Berger, 2002).

The forms of alternative globalization are created in the cultural movements of global scope originating outside the Western world but having an effective impact on it (Berger, 2002). Tulasi Srinivas refers to this process – that turns the terms of a cultural globalization seen unilaterally moving only from the West towards the rest of the world upside down – as "emissions". These movements can be found among the common people and also in the elites. Alternative globalizations take place not only through organized movements, like those of Buddhism or Islamism, but also through the spontaneous spread of beliefs and practices like reincarnation, Yoga, meditation, natural and homeopathic medicine, among others. The last is probably the most important Asian cultural influence in the West. (Berger, 2002)

China constitutes a particular case, as it is considered a "managed globalization", in reference to the role of intermediation and control played by the Chinese government

[112] Paradoxically, among the cases studied Germany is one of the examples of a relatively "weak" culture.

in key areas of culture, particularly intellectual culture and social movements, aimed at controlling the entrance and spread of Western ideas or ideologies.

A summary of the study's conclusion includes the following,

a. The business culture tends to create a more apparent than real homogeneity, particularly in those societies in which there are different strongly rooted cultural traditions. Among the so-called *"yuppies"* (in principle, the sector that is most receptive to the influences of global culture), the international business culture often configures a cosmopolitan identity[113] but that does not mean that it encompasses all the aspects of their lives. Berger speaks of "cosmopolitans all the way" but in the cases in which this culture enters cultural spaces where different or specific cultural traditions have strong roots, the evidence shows that there is a tendency towards a sort of "creative compartmentalization", a segmentation between the work or business space and all the other spheres of personal life (Berger, 2002). In this sense, several studies show that dual behaviours are often found.

   The type of response depends basically on the cultural resources available to maintain or to build alternative personal life-styles. In the extremes, the study presents the case of Eastern Germany (after the German unification process), where nostalgia for the past did not offer cultural resources that were powerful enough, while in the case of India (characterized as a "dense" culture) the elite linked to business and international economy manage to combine life-styles that are strongly based on traditional values, with practices and behaviours that are consistent with an international business culture. In this latter sphere, there is practically no difference between a German, a British or an Indian. En el original aquí dice "hindú"; yo recomendaría cambiarlo por "indio" porque el gentilicio es ése mientras que "hindú" es la religión mayoritaria (pero no única) de la India.

   The findings for the cases of China, Taiwan or Japan (also strong or dense cultures), also show this duality in personal practices and behaviours but emphasize the coexistence of typically Western – and particularly USA – business styles and practices, with traditions that are part of an autochthonous cultural heritage that are also placed in the business sphere. With regards to China, a "Confucian merchant"[114]

[113] They are fluent in English, dress and act in similar ways, at work and in leisure spaces, and can even think alike (Berger, 2002).

[114] The Confucian ideal assumes a personal behaviour adjusted to norms related to benevolence, rectitude, decorum, intelligence and seriousness (Yunxiang Yan, 2002).

is a business man or woman who has managed to master the essence of the traditional culture, promotes this learning, has close links to the political elite and uses personal networks that are based on kinship and friendship relationships (Yan, 2002). In relation to Japan – one of the most paradigmatic cases of a consistent and early cultural hybridization process – it is pointed out that the traditional practices of "personalized business", widespread in Asia, have been the core of a business strategy that relies on building personal relationships through frequent visits to and interaction with commercial partners, combined with a deliberate exploitation of a carefully constructed reputation of quality and reliability (Aoki, 2002). A similar process was observed in Taiwan, where what still prevails is the pattern of "personalized business", based on personal relationships and connections, relying on principles of reliability and trustworthiness. (Hsin-Huang Michael Hsiao, 2002).

b. Even though intellectual culture is basically circulated in specialized spaces, it can have an important rebound effect on the configuration of broader discourses that develop and are circulated through other means, reaching sectors of the population that are not linked to Academia. Berger adds that the influence of Western thinking – and particularly the USA – over this sector of the elite culture, is channelled through funding networks that provide resources for research, scholarships, etc. to scholars and students, as well as through an important editorial production and funding of international activism. Thus, the conditions for a global market promoting "ideas and behaviors invented by Western (mostly American) intellectuals, such as the ideologies of human rights, feminism, environmentalism, and multiculturalism, as well as the politics and lifestyles that embody these ideologies" (Berger, 2002).

However, the degree of influence of intellectual culture in local spaces varies and, in general, is higher when inscribed in modernization processes. In most studies it is pointed out that the fact that some ideas, more than others, have had an impact on the production of a local intellectual culture similar to that of the *faculty club* has to be explained from the particular conditions of each context. In the case of Japan, for instance, since the moment it entered its modernization process – even much earlier than globalization – an intellectual cultural similar to that of the *faculty club* had already been configured, but while its influence on environmental issues has been scarce, it has been intense and direct in the case of Feminism[115] (Aoki, 2002). In regard to Taiwan, there is also a reference to a cultural localization process, with discourses that were directly adopted from the West (like environment preservation,

[115] Almost all case studies refer to the influence of the Feminist movement, to different degrees.

human rights and gender equality) and then localized (Hsin-Huang Michael Hsiao, 2002).

China is a particular case. Yunxiang Yan (2002) points out that the Chinese discourse on globalization is usually presented as a continuation of the narrative on the modernization project in such a way that most intellectuals see globalization as an unavoidable trend as well as a key for modernization and human development. The Chinese Communist Party (the so-called State Party) has been much more receptive to the international business elite and popular cultures than to intellectual culture, a space that it has always tried to directly control, understanding that an uncontrolled diffusion of Western ideas could imply the development and strengthening of ideological positions that could challenge its political project. The author suggests that the Chinese State has employed a set of strategies to manage "cultural transition", from campaigns against the influence of foreign culture – particularly Western – to controlling important sectors of the cultural market (publishing houses, movies, TV and media) or providing political and economic incentives to those following the Party's ideological line. He also argues that this latter measure has functioned as a sort of self-censorship that has practically made State intervention unnecessary.

c. The popular component of the emerging global culture, propagated through all kinds of business enterprises (Nike, Benneton, McDonald´s, Disney, MTV, etc.), penetrates in different ways in local societies and, very often, through the urban middle classes (that sometimes also intermediates the processes through which this culture is irradiated towards the popular sectors), producing passive acceptance, cultural hybridization or revitalization of local cultures.

According to Berger, it is possible that "much of the consumption of this popular culture is arguably superficial, in the sense that it does not have a deep effect on people's beliefs, values, or behavior", but it is also possible that it is causing a significant change in them (2002). He differentiates between "sacramental"[116] and "non-sacramental" consumption, to indicate the type of change that seems to be taking place in the cultural configuration. However, it is very likely that as some products and images become more common, a transition from "sacramental" to "non-sacramental" consumption will occur.

[116] He defines the "sacramental" consumption as that which is culturally charged, that is, that represents for the consumer a visible sign of real or imagined participation in global modernity; to eat a hamburger in McDonald's can just mean to eat a hamburger but it can also mean that one is consuming an icon representing USA-style modernity (Berger, 2002).

The moves from passive acceptance originate mostly in East Asia, India and Japan. In East Asia, for instance, fast-food companies have been forced to modify the architectural conception of their selling outlets and the type of services they provide, and the way in which their "flagship" products are prepared. Berger says that it has been documented how Asian patrons of fast-food establishments tend to linger in them, particularly housewives and schoolchildren who use them as resting places. In India, fast-food chains have had to adjust their products, using local supplies to be able to sell, changing the names of their products, introducing vegetarian dishes and even investing in advertising to spread information about the Indian origin of their raw materials (Tulasi Srinivas, 2002). Under these conditions, these companies have been forced to localize – that is, to adjust to the specificities of local culture – paying the costs that such adaptation involves.

There are many other forms of cultural hybridization in the popular culture sector, like the mix between Western and African aesthetics in South African women's hairstyles even though, paradoxically, the icons of success – the one that people wish to mimic – are mostly associated with public figures representing strictly Western and particularly US life-styles. Bernstein (2002) says that South Africa selectively adapts US and other globalizing cultural influences and shows a great porosity to US popular and consumer culture (Bernstein, 2002).[117]

India and Japan offer special cases of revitalization of local cultures. The arrival of Western fast-food chains in India has encouraged the proliferation of traditional fast-food outlets, as well as the rise of an indigenous pre-cooked food industry (Tulasi Srinivas, 2002); while in Japan, Western fashion has given place to the development of an indigenous fashion industry characterized by a typically Japanese aesthetic (Berger, 2002).

d. The culture of social movements, linked to the spread of Western ideas – what Berger calls the ideologies of human rights, feminism or environmentalism – operates by creating a critical mass of local intellectuals and activists that emerges under the influence of these ideas. The international outreach of movements originating from the Western side of the world, and basically in developed countries, feeds the emergence of equivalent local groups or popular movements, but its capacity to influence their shaping or maintain their continuity is quite varied. Berger

[117] The consumption of men's shirts decorated with African motifs became very popular among the African-American population and was introduced in South Africa from the USA. This is one of the examples of this porosity.

differentiates between genuine popular movements – that can become very attractive for local populations – and groups that become a sort of "*comprador* class" to the service of "metropolitan agencies".[118] The case studies present different situations describing and explaining how the forms and degrees of Western ideas become entrenched in local groups and social movements.[119]

The most well known versions of cultural globalization in the field of religious beliefs and practices are the Christian-oriented movements spreading from the West towards other regions of the world. The most outstanding could be the Catholics, operating through organizations like the Opus Dei, and the Evangelical Protestant, particularly in their Pentecostal version, that has spread throughout the world without being noticed and wherever it has penetrated it has been assimilated into local culture, thanks to the localization strategies implemented taking into account the specificities of each local context. In relation to the latter, Berger notes that a good portion of its success lies in the promotion of a Protestant ethic combining the exaltation of individuality (very linked to the idea of personal advancement) with egalitarianism[120] and the capacity to create voluntary associations.

Religious and secular movements promoting alternative life philosophies are a particular phenomenon. A good portion of them represents alternative globalization modalities. India is one of the main "emitters" of ideas, beliefs and practices towards the West, even though Japan and China are also representative cases. These emissions reach the West in the form of organized movements (both elite and popular), but also in a spontaneous way. Berger points out that the most important Asian influence in the West is the one under the New Age culture, that involves beliefs like reincarnation, *karma*, harmony between the individual and nature, and also behaviours and practices like meditation, yoga, therapeutic massage, martial arts, homeopathic medicine and acupuncture, among others.

[118] The latter statement has a huge negative charge, as it suggests that local intellectual or activists can act as bearers of a sort of cultural imperialism for economic interest or inability to reflect. N.T.: "comprador" (buyer) is in Spanish in the original.

[119] This point was already discussed in the section on the diffusion of intellectual culture.

[120] The author points out that this happens "particularly between men and women".

GLOSSARY

Without any pretension of exhaustiveness and with the aim to facilitate the understanding of the texts on globalization, we will define some of the concepts that appear frequently in the literature on the subject, beginning with that of globalization itself. In any case, it is worth clarifying that the definitions that follow are the product of reading and re-reading the uses that different authors make of these terms, so they should not be taken as single or universally accepted definitions.

Globalization: Imprecise and multivalent term that is often used to refer to the intensification of transnational/crossborder interactions of different kinds (social, economic, political and cultural), created by the vertiginous development of information and communication technologies. Originated in the world of economy and finance.

Subglobalization: Refers to the regional globalization processes that take place between countries in the same geographical area. The typical case is that of the European Union. They are considered as globalization projects inserted in the broader and comprehensive process of economic or cultural globalization and at the same time presenting specificities in relation to the process hegemonized by the USA without fully configuring an alternative globalization project.

Glocalization: Defined on the basis of the global-local interaction. This term is used to refer to the cultural landings of "global culture" resulting in its adaptation to local culture or in cultural hybridization. It is from a Japanese term originating in the business culture and more specifically in marketing.

Mundialization: Used as equivalent of "globalization" and originating in Europe, more specifically in France. In Political Economy studies it is used in relation to the capitalist system to indicate its adoption as a universal system or to highlight its configuration as a world-system.

Internationalization: This term originates in the word "international" as used in International Public Law and was then used to refer to the field of action for labour, peace, religious, environmental, human rights and other movements, projecting themselves beyond national borders. Today "internationalization" applies to capital, production, labour force and cultural goods of global circulation. It refers to a double process that entails its deterritorialization/delocalization and its consequent – but never definite – reterritorialization/relocalization in different places or territories of the planet.

Transnationalization: In the beginning this term was applied to business and corporations originally from the USA that extended their operations to other countries in the form of subsidiaries, branches and other corporative forms (later it was also extended to similar corporations in Europe and Japan). Today it refers to capital, production, labour force and cultural goods of global circulation, that stop being strictly national (thus, they become denationalized) even though they keep certain kinds of links with the countries in which they originate. It also implies a double process of deterritorialization/delocalization and subsequent reterritorialization/relocation.

Global economy: The phase of world economy that started in the 70s, characterized by a swift growth of transactions and institutions outside inter-State relationships.

BIBLIOGRAPHY

AMIN, Samir (1997): *Capitalism in the Age of Globalization: The Management of Contemporary Society*. Zed Books, London.

———————— (1996): *Les défis de la mondialisation*. L' Harmattan, Paris.

AOKI, Tamotsu (2002): "Aspects of Globalization in Contemporary Japan". In: *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

APPADURAI, Arjun (1996): *Modernity at Large: Cultural Dimensions of Globalizations*. University of Minessota Press, Minneapolis.

———————— (1999): "Globalization and the research imagination". In: International Social Science Journal, Volume 161, Issue 160, pages 229-238, June 1999.

ARRIGHI, Giovanni (1997): "Globalization, State Sovereignty, and the 'Endless' Accumulation of Capital,"Revised version of a paper presented at the Conference on "States and Sovereignty in the World Economy," University of California, Irvine, Feb. 21-23, 1997.

BAUMAN, Zygmunt (1998): *Globalization: The Human Consequences*. Columbia University Press, New York.

———————— (2001): *Community. Seeking Safety in an Insecure World*. Polity Press, Cambridge.

———————— (2002): *Society Under Siege*. Polity Press, Cambridge.

BERGER, Peter L. (2002): Introduction. In: *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

BERNSTEIN, Ann (2002): "Globalization, Culture and Development: Can South Africa Be More Than an Offshoot of the West?". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

BESSERER, Federico (1999): *Estudios transnacionales y ciudadanía transnacional*. Gail Mummert (Ed), Fronteras Fragmentadas. Colegio de Michoacán-CIDEM, Michoacán. *http://www.cholonautas.edu.pe*

BORÓN, Atilio. (2002): " 'Pensamiento único' y resignación política: los límites de una falsa coartada". In: *Mundo global, ¿guerra global?* Ediciones Continente, Buenos Aires.

BOURDIEU, Pierre (2001): "Unite to better dominate". In *ITEMS & Issues. Conflicts over Globalization: Symposium on Globalization*. Social Science Research Council, Vol. 2, N° 3-4, Nueva York. http://www.ssrc.org/publications/view/3F7981CB-1F60-DE11-BD80-001CC477EC70/

CANALES, Alejandro y Christian Zlolniski (2001): "Comunidades transnacionales y migración en la era de la globalización". In: *Notas de Población*, Año XIX, N° 73, CEPAL CELADE, Santiago de Chile, pp. 221-252.: *http://www.eclac.cl/publicaciones/xml/2/8852/lcg2124P_7.pdf*

CASTELLS, Manuel (1998): "Globalización, tecnología, trabajo, empleo y empresa". In: *La factoría* (*on line*), Nº 7. Tomado de: *http://www.lafactoriaweb.com/articulos/castells7.htm*

CASTLES, Stephen (1997): *International Migration and Multiculturalism*. Keynote address at the MOST Inter-governmental Council Meeting, June 16, 1997. http://www.unesco.org/new/en/social-and-human-sciences/themes/social-transformations/most-programme/intergovernmental-council/igc-sessions/

CASTRO-GÓMEZ, Santiago (1998): "Geografías poscoloniales y translocalizaciones narrativas de lo latinoamericano. La crítica al colonialismo en tiempos de la globalización". In: *Enfoques sobre posmodernidad en América Latina*. Roberto Follari y Rigoberto Lanz (comps.). Editorial Sentido, Caracas. *http://www.cholonautas.edu.pe*

CORONIL, Fernando (1993): "Naturaleza del poscolonialismo: del eurocentrismo al globocentrismo". In: *La colonialidad del saber: eurocentrismo y ciencias sociales. Perspectivas latinoamericanas*. Edgardo Lander (comp.). CLACSO, Buenos Aires, pp. 87-111. *http://www.cholonautas.edu.pe*

FERRER, Aldo (1999): *De Cristóbal Colón a* Internet*: América Latina y la globalización*. Fondo de Cultura Económica, Buenos Aires.

——————— (1999): *Historia de la globalización II. La Revolución Industrial y el Segundo Orden Mundial*. Fondo de Cultura Económica, Serie de Economía, Buenos Aires.

GARCÍA CANCLINI, Néstor (2000): *La globalización, ¿productora de culturas híbridas?* Actas del III Congreso Latinoamericano de la Asociación Internacional para el Estudio de la Música Popular, Colombia.: *http//www.hist.puc.cl/historia/iaspmla.html*

——————— (1995): *Consumidores y ciudadanos. Conflictos multiculturales de la globalización*. Editorial Grijalbo, México D.F.

GIDDENS, Anthony (2000): *Runaway World: How Globalization is Reshaping Our Lives*. Routledge, New York.

HELD, David (1995): *Democracy and the Global Order. From the Modern State to Cosmopolitan Governance.* Stanford University Press, Stanford, CA.

HELD, David et al. (1999): *Global Transformations. Politics, Economy and Culture.* Stanford University Press, Stanford, CA.

HELD, David and Anthony McGrew (2007): *Globalization/Anti-globalization. Beyond the great divide.* Polity Press, Cambridge.

HOPENHAYN, Benjamín y Alejandro Vanoli (2001): *La globalización financiera. Génesis, auge, crisis y reformas*. Fondo de Cultura Económica, Buenos Aires.

HSIAO, Hsin-Huang (2002): "Coexistence and synthesis. Cultural Globalization and Localization in Contemporary Taiwan". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

KELLNER, Hansfried and Hans-Georg Soeffner (2002): "Cultural Globalization in Germany". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

MAQUIEIRA, Virginia y María Jesús Vara (1997), eds: *Género, clase y etnia en los nuevos procesos de globalización.* XI jornadas de investigación interdisciplinaria sobre la

mujer. Instituto Universitario de Estudios de la Mujer, Universidad Autónoma de Madrid, Madrid.

MARTÍN, Carlos D. (2002): "Las transformaciones del escenario internacional". In: *Revista Fuerzas Armadas y Sociedad-Fasoc*, Año 17, Nº 1-2, enero-junio, FLACSO, Santiago de Chile, pp. 44-57. Tomado de: http://www.fasoc.cl/files/articulo/ART40f6ff803327b.pdf

MARTÍN DÍAZ, Emma (2008): *El impacto del género en las migraciones de la globalización: mujeres, trabajos y relaciones interculturales*. X Coloquio Internacional de Geocrítica "Diez Años de Cambios en el Mundo, en la Geografía y en las Ciencias Sociales, 1999-2008". Barcelona, 26-30 de mayo de 2008. Taken from: *http://www.ub.es/geocrit/-xcol/72.htm*

MATTELART, Armand (2006): *Diversité culturelle et mondialisation*. Paris, La Découverte, MÁTYÁS KOVÁCS, János (2002): "Cultural Globalization in Hungary". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

MORALES MENA, Natalia (2007): "Identidad transnacional, diáspora/s y nación: una reflexión a partir del estudio de la migración uruguaya en España". In: *Cultura y transformaciones sociales en tiempos de la globalización. Perspectivas latinoamericanas*. Mato, Daniel y Maldonado Fermín, Alejandro. CLACSO, Buenos Aires, pp: 181-197. Taken from: *http//www.bibliotecavirtual.clacso.org.ar/ar/libros/campus/mato/Mena.pdf*

ODDONE, Nahuel y Leonardo Granato (2003): *Cuestiones globales en debate*. Working Paper Nº 01. Centro Argentino de Estudios Internacionales. Taken from: *http//www.caei.com.ar*

OZBUDUN, Ergun y E. Fuat Keyman (2002): "Cultural Globalizations in Turkey: Actors, Discourses, Strategies". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.
ROBERTSON, Roland (1995): "Globalization". In *Global Modernities*, Mike Featherstone, Scott Lash and Roland Robertson eds. Sage Editor, London.

ROBINSON, William (2002): "Capitalist Globalization and the Transnationalization of the State" in *Historical Materialism and Globalization,* Mark Rupert and Hazel Smith (eds).

SANTOS, Boaventura de Sousa (1998): *La globalización del Derecho. Los nuevos caminos de la regulación y la emancipación*. Universidad Nacional de Colombia - ILSA, Bogotá.

——————— (2003): *La caída del* Angelus Novus*: ensayos para una nueva teoría social y una nueva práctica política*. Colección en Clave Sur, Universidad Nacional de Colombia - ILSA, Bogotá.

SARTORI, Giovanni (2001): *La sociedad multiétnica. Pluralismo, multiculturalismo y extranjeros*. Taurus. Grupo Santillana de Ediciones, Madrid.

SASSEN, Saskia (1998a): "The Role of National States", ECCHR Conference on Transnational Corporations and Human Rights, Dec. 4, 2008, available at http://www.engagemedia.org/Members/ECCHR/videos/Saskia_Sassen.wmv/view

——————— (1998b): *Globalization and Its Discontents*. New Press, New York.

——————— (2007): *A Sociology of Globalization*. W.W.Norton, Inc., New York.

SOLER, Fernando (2001): "Mundialización, globalización y sistema capitalista". In: *Revista Economía, Sociedad y Cultura (on line).* Universidad de Valencia. Taken from: *http://www.rcci.net/globalizacion/2001/fg155.htm*

SOROS, George (2002): *On Globalization*. Public Affairs. New York.

SRINIVAS, Tulasi (2002): "A Tryst with Destiny: The Indian Case of Cultural Globalization". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

SUBCOMANDANTE Marcos (2002): "7 piezas del rompecabezas mundial". In: *Mundo global, ¿guerra global?* Ediciones Continente, Buenos Aires.
STIGLITZ, Joseph E. (2002): *Globalization and Its Discontents*. W.W.Norton & Co. New York.

——————— (2006): *Making Globalization Work*. W.W. Norton & Co. New York.

STRANGE, Susan (2001): *The Retreat of the State: The Diffusion of Power in the World Economy*. Cambridge University Press, 1996.

TOMLINSON, John (1999): *Globalization and Culture.* Nottingham Trent University Press.

TOURAINE, Alain (1999): *Comment sortir du libéralisme*? Arthème. Fayard, Paris.

UNFPA (2006): *State of World Population 2006. A Passage to Hope: Women and International Migration.*

UNHCR (2001)¨El mundo de las mujeres refugiadas¨ In: Mujeres en busca de un trato mejor. Las niñas perdidas de Sudán. Revista Refugiados Nº 114. Taken from: http://www.acnur.org/revistas/114/pg4art2.htm

YAN, Yunxiang (2002): "Managed Globalization: State Power and Cultural Transition in China". In *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

WALLERSTEIN, Immanuel (2004): *World-Systems Analysis: An Introduction*. Durham, North Carolina: Duke University Press.

2. GLOBALIZATION, EXISTING RESISTING OR DESISTING?

Moriana Hernández Valentini[1]

The question I posed to myself is: Is globalization existing, resisting or desisting? I confess that I have more questions than answers.

Before referring to globalization itself, I would like to refer to the previous stage in the post-war times that has been called the "golden age of capitalism", because it was in those twenty five years that a serious growth of global production and trade took place. That period is also known as "the Bretton Woods world".

In the wake of the Second World War, what was that world like? The USA ruled: the country with a concentration of 80% of the global gold, the most industrialized one, the one that did not suffer the consequences of the war in its territory, whose production had doubled from before the war and which had already become a military power.

Faced with the fear that the soldiers' return would create unemployment, the USA president implemented two measures: to encourage women to go back to their homes, and the Bretton Woods agreements, looking for a liberalization of trade that would ensure for the USA a high number of markets to buy and sell raw materials.

Let us remember that, even though it is said that the Bretton Woods agreements were global in nature, in fact they were signed by only 44 countries, none of them from the

[1] Feminist. Sociologist. Uruguayan and Mexican. Graduated in Uruguay State `University (UDELAR), where she also did post-graduate studies in `Demography. Also graduated as highest level public administrator from the National 'Civil Service Office' School (ONSC). As a human rights defender, during (Uruguayan) dictatorship she exposed violations before the Human Rights Committees of the UN and the OAS. Co-founder of the Women's Commission of Uruguay Unified Trade Union (PIT-CNT) and of the women's commissions of her sector and political party. She worked as an advisor on gender issues for several MPs and as Technical Secretary of the Women's Bicameral Bloc. A member of CLADEM Uruguay since its creation, she acted as National Coordinator and member of its Management Committe. She currently coordinates the Regional Campaign for a Non-Sexist and Antidiscriminatory Education driven by CLADEM.

Socialist bloc, none from the former Axis and almost none from the Third World –most of which were still colonies. India and the whole of Africa were among those absent.

The agreements expressed USA's hegemony as an economic and military power, while at the same time consolidated its role as the new centre for organizing capitalist expansion or, like Arrighi would say, as a "tracklaying vehicle".

The "peace and prosperity" agreements signed in Bretton Woods in 1944 sought to establish a "new international economic order" that would bring stability to commercial transactions through a world monetary system, with a solid exchange rate based on the dollar and a relative control on the circulation of capital.

The gold exchange standard was established, by which the USA committed to keep the price of the gold ounce as 35 dollars, turning the dollar into an international currency. Other currencies must fix their value in relation to the dollar that is almost fixed, and the USA also committed to intervene to ensure that the price variations would be very small.

Along with that, the circulation of capital from one country to another was controlled and both openness and free trade were encouraged – through reducing tariffs and other barriers to international trade. The World Bank and International Monetary Fund were created. The famous economist John Maynard Keynes – leading the British delegation – also proposed the creation of another institution that would regulate trade. Even though that agreement was not reached at Bretton Woods, it would be signed later, in 1948, resulting in the creation of GATT that in 1995 would become the current World Trade Organization (WTO).

Up to then, the USA was winning in all fronts. What made the situation change? (What follows is my opinion, there are many others). The USA deficit started to grow, as a result of the high costs imposed by the Cold War and particularly what the Viet Nam war meant – it is estimated that the USA spent more than 165 billion dollars there. Besides, as it was investing in the recovery of Europe and Japan, its capital was abroad, increasing its deficit. At the same time, since the mid-60s deregulated institutions such as the Euromarkets and offshore banking emerged.

In spite of the fact that the Bretton Woods agreements established a fixed correlation between the once gold and the dollar – 35 dollars for one ounce – the solution that the USA found for this problem was to issue currency. This is what it did in 1971, decreasing the gold backing for its currency. Capital began to recede with a loss of trust in the dollar's backing, which in turn again increased the deficit.

Faced with this situation and without even informing the USA's own State Department, the then president Richard Nixon suspended the convertibility of the dollar and devalued its currency. This measure was reiterated in 1973, extinguishing the convertibility agreed in Bretton Woods and causing the First World currencies to start to fluctuate freely. In general terms, we can state that this is how the economies of Bretton Woods are broken and the age of globalization begins.

The role played by the international monetary system in the prosperity of the post-war years is a subject for debate; some consider it the reason for prosperity, while others – like Samir Amin – think otherwise. For Amin, the growth experienced during those years was based on European reconstruction driven by the Marshall Plan; the Welfare States resulting from the commitment between capital and labour; and the disconnection between the capitalist world system and the Socialist countries. When those three systems fell into a crisis because of globalization, the monetary system born in the post-war years collapsed. For Amin and others, the dismantling of the Bretton Woods system was a product of the crisis and not its cause.

As we now have briefly reviewed the situation preceding globalization, let us move fully into the economic dimension, its most studied and debated dimension.

The recent outbreak of the economic crisis poses many questions that are far from having uniform answers. How deep will the crisis become? What will its impacts be? Will it cause the final collapse of capitalism? Will globalization resist, or desist? To a great extent, the answers to these questions depend on how the nature of globalization is understood.

The naive and basic question that comes up is whether, in the end, globalization is good or bad. We should actually ask ourselves if globalization contributes to development, to take us closer to a more fair, inclusive world, without discriminations or if, on the contrary, it increases the injustices that are intrinsic to the ruling system. We will see that there is not only one answer to this question.

For a start, I would like to highlight that what I am going to present is a very basic schema that I hope helps to facilitate understanding, keeping in mind that the borders between what I will present as opposed currents are not as clear as I will make them seem. For several authors, the basic statements they endorse show a wide array of nuances, that is not good to deny if we want to have a real perception of the richness of this debate.

Held, McGrew, Goldblatt and Perraton propose a taxonomy of Globalization Studies, identifying three currents: hyperglobalizers, sceptics and transformationalists. What is interesting about this analytical classification is that in each school we can find liberal, neoliberal and conservative authors, as well as neo-Marxists, socialists and radicals.

According to Held et al, hyperglobalizers believe that

> the eruption of global economy, the emergence of global governance institutions and the diffusion and hybridization of cultures are read as evidences of a radically new global order, that predicts the disappearance of the nation-State.[2]

Naturally, for the neoliberals in this school, the market and economic competition are indicators of humanity's progress. While for others, economic globalization generates a new international division of labour producing exclusion, no longer between the centre and the periphery but within, between and across States[3].

On their part, the scepticals state that globalization is not a completely new phenomena and it is not in our times that the economic exchanges between nations have been the highest. According to Borón,

> The rhetoric of globalization – or may be its intended ¨mythologization¨ – severely distorts facts by presenting an intrinsic and secular trend of the capitalist mode of production as if it were a momentary and unexpected result... [4]

We will later summarize Arrighi, who clearly embodies this trend.

The transformationalists are so called because they affirm that globalization is a new phenomenon, bringing with it a chaotic transformative force, of uncertain development and consequences. They also believe that the new economic order configures new world stratification patterns.

If we observe those that have focussed on the consequences of globalization, we can say – running the risk of being very schematic – that there are basically two positions: the

---

[2] HELD *et al.*, quoted by Inés Romero, (2008). *The Debate on Globalization,* p.2.

[3] *Ibid.*

[4] BORÓN, Atilio..."Pensamiento único y resignación política: los límites de una falsa coartada". In: *Mundo global, ¿guerra global?* Ediciones Continente, Buenos Aires, 2002, p.13.

one that I would call "pro-globalization", that believes it is an irreversible phenomenon that can be managed and only requires that the insidious effects it is already creating are corrected; and the other called "antiglobalization", that from its initial negative position towards globalization has moved to believe that there is a need to think of alternative possible globalization models.

With regard to the economic aspect, we can also find two currents: one considering globalization as a structural phenomenon, and the other seing it as an institutional phenomenon.

Those holding the structural perspective affirm that globalization is an immanent phenomenon to capitalism, belonging to its essence. As Atilio Borón would say "Its age is as old as that of capitalism: almost five centuries". To underlie this fact, the authors in this school of thought speak of "capitalist globalization".

For them, the dynamic is marked by the system's expansion and crisis cycles and they say that our current historical period – known as financiarisation or financial globalization – is the expression of a new crisis of global capitalism that had different modalities in each of its cycles.

The increase in productive capacity that is being generated thanks to the new technologies applied to production, and also by the fact that European countries – already recovered from the war – have also begin to produce in large scale, as does Japan. All these factors multiply the global productive capacity and, as a consequence, inter-capitalist competition increases.

While the offer of goods and services increases, the demand is inelastic as it has a cap, because the millions of poor people around the world, with their scarce resources, cannot consume everything that is produced and this fact reduces the profitability of the capital. This phenomenon by which the offer of goods increases but the demand cannot absorb it, is known as an "over-production crisis".

Over-production and the consequent decrease in profitability, cause a huge mass of surplus capital to become idle and flee towards the financial sector, in an attempt to not be devalued. On its part, the migration of capital towards the financial sector generates a crisis in the real sector of the economy, as producers lose access to credit.

At the same time, a huge mass of capital becomes concentrated – as a result of the way in which the USA attracts global savings; of its issuing currency; and also of the

oil-dollars released by the increase in oil prices during the 1973 crisis. This capitals is channelled into financial speculation – offering more profit – that increasingly attracts more capital and will end leaving the real economy without funds. We have a very clear example of the consequences brought about by the eagerness to invest capital. Do you remember when Third World countries were offered credit, which they took, contracting a debt that brought about the famous Latin American debt crisis of the 80s?

This phenomenon of the prevalence of the financial goods markets over the real economy market is what is called financiarisation. This prevalence is made possible by the adoption of the floating exchange in the beginning of the 70s and the deregulation of the capital market (that, as we saw, "makes up" instruments like offshore banking and off-sheet activities) guaranteeing its safety and the return of profits.

For some authors, financiarisation is just one aspect of the crisis in the capitalist production system, while others consider that it is a mechanism of the capitalist system to create the conditions for a new expansion and still others, like Amin, believe it is a way of managing the crisis.

If you visit the webpage where the electronic dialogues we held on this issue in 2009 are uploaded, you will find many authors – and all of them are worth reading. Due to time constraints, I chose only three to summarize their ideas in this presentation: Walden Bello –even though he was not included in our course bibliography, Giovanni Arrighi and William I. Robinson.

The Filipino political scientist Walden Bello considers that capitalism finds three escape routes out of the over-production crisis: neoliberal restructuralization, globalization and financiarisation.

For Bello, the goal of neoliberalism is to revitalize capital accumulation. The neoliberal thesis is that, by removing restrictions on capital the rich would have incentives to invest and relaunch economic growth. The problem with this formula lies in the fact that, with a regressive income redistribution, what you do is to squeeze the income of the poor and the middle classes, reducing demand without necessarily inducing the rich to invest more in production, because for them it might be more profitable to invest in speculation (as it has already happened...). Also, and even when being successful, in the long term such a strategy would do nothing but aggravate the basic problem, as investing in production would bring along even higher volumes of installed productive capacity.

The second escape route to counterbalance stagnation was "extensive accumulation" or globalization, that is, the swift integration of semi-capitalist, non-capitalist or pre-capitalist areas into the global market economy. China is the best example of a non-capitalist area integrated into the global market. What is the goal here? To have cheap labour and new and unlimited markets; new sources of agricultural products and other cheap raw materials. To attend to that "extractive" need, part of the capital – basically through the World Bank – is devoted to fund infrastructure in our countries: roads, bridges, railroads, etc.

The problem with this escape route out of stagnation is that it exacerbates over-production, because what it actually does is to add productive capacity. Let us just think of the imposing volume of Chinese manufacturing capacity that in the last 25 years has been aimed at the global market, having a depressing effect on prices and benefits.

As usual, it is good to remember the contributions of women. Allow me to digress in order to point out that in 1913, in her book The Accumulation of Capital, Rosa Luxembourg had already pointed out that capital needed this mechanism to increase the rate of profit for metropolitan economies.

The third mechanism that Bello identifies is financiarisation, arguing that it increased the bifurcation between a hyperactive financial economy and a stagnant real economy.

> The problem with investing in financial sector operations is that it is tantamount to squeezing value out of already created value. It may create profit, yes, but it does not create new value – only industry, agricultural, trade, and services create new value. Because profit is not based on value that is created, investment operations become very volatile and prices of stocks, bonds, and other forms of investment can depart very radically from their real value.[5]

Let us now analyze Giovanni Arrighi, an author I find very interesting. He starts by asking if globalization is such a new phenomenon and answers that it is not, that there are differences in degree but not in nature: *"My contention here will be that the true novelty of the present wave of globalization is that this evolutionary pattern is now at an impasse*".[6] In fact, he suspects that globalization is rather a discourse than a reality, "*nothing more*

[5] BELLO, Walden. *Capitalist crisis and response.* Available at http://www.all4all.org/2009/06/3514.shtml

[6] ARRIGHI, G. *Globalization, State Sovereignty, and the 'Endless' Accumulation of Capital.* Available at: http://fbc.binghamton.edu/gairvn97.htm

than a promotional gimmick to make the best of a necessary adjustment in the system of international finance".[7] Because, as he argues, much of what is considered globalization "*has in fact been a recurrent tendency of world capitalism since early-modern times".*[8]

He points out that, in the end, the Bretton Woods Agreements already established a system that is global, hierarchical and politically controlled by the USA. While now, in his opinion, what exists is a more decentralized global system, basically coordinated by the market. For Arrighi, the novelty of globalization lies in the fact that in this stage capitalism is spread throughout the world and the capitalist production system encompasses the planet. Historically, this is a new phenomenon, there has never been a production system encompassing the entire world.

> ... periods characterized by a rapid and stable expansion of world trade and production invariably ended in a crisis of over-accumulation that ushered in a period of heightened competition, financial expansion, and eventual breakdown of the organizational structures on which the preceding expansion of trade and production had been based.[9]

In each of these systematic accumulation cycles a new leadership emerges, a "tracklaying vehicle*",* [10] as he calls them, organizing the system to a larger scale, scope and complexity than the previous one (as was done in succession by the Genovese diaspora in the late 16th century, by Holland in the 18th century, Great Britain in the late 19th century and then by the USA).

For him, the financial expansion wave is born out of an overaccumulation of capital that is channelled into financial speculation that in turn produces competition among States to capture the capital that would compensate the budget deficits generated for States as a consequence of the fall in production, trade and – as a result of them – tax

To say it in his own words,

> In any event, waves of financial expansion are engendered by a double tendency. On the one hand, capitalist organizations respond to the over-accumulation of capital over and above what can be reinvested profitably in established channels of trade and production by holding in liquid form a growing

[7] *Ibid* p. 3.
[8] *Ibid* p.1.
[9] *Ibid* p.4.
[10] *Ibid* p.7.

> proportion of their incoming cash flows. This tendency creates what we may call the "supply conditions" of financial expansions--an overabundant mass of liquidity that can be mobilized directly or through intermediaries in speculation, borrowing and lending. On the other hand, territorial organizations respond to the tighter budget constraints that ensue from the slow-down in the expansion of trade and production by competing intensely with one another for the capital that accumulates in financial markets. This tendency creates what we may call the "demand conditions" of financial expansions. All financial expansions, past and present, are the outcome of the combined if uneven development of these two complementary tendencies.[11]

He states that the capitalist system has faced repeated crises, but he identifies four major ones. Crises are systemic to capital: capitalism falls again and again into overaccumulation crises that are phases *"in the formation and gradual expansion to its present global dimensions of the world capitalist system".*[12]

In the current financial expansion, the novelty is that a fission has taken place between the military power – held by the USA and its allies – and the financial power dispersed among "*a motley ensemble of territorial and non-territorial organizations which,* de facto *or* de jure*, cannot even remotely aspire to match the global military capabilities of the United States*"[13], justifying its affirmation that there is an impasse in the expansion.[14] Even though he argues that it is too early to know it, Arrighi wonders if the economic rise of East Asia, that has made it into the main centre for world-scale capital accumulation processes could not be a *preamble to a recentering of the regional and world economies on China as they were in pre-modern times*".[15]

Another author that I consider very interesting is Robinson who, among his other merits, has that of integrating the patriarchal organization of labour and the gender dimension into his work.

For this author, globalization is the highest phase of world capitalism, a product of the end of the initial accumulation of capital on a world scale and of the existence of a single mode of production in the world – capitalism – that corresponds with the culmination of

[11] *Ibid* .
[12] *Ibid* .
[13] *Ibid* .
[14] *Ibid* .
[15] *Ibid.*

the primitive capital accumulation phase. Please take into account that I am presenting his thesis in a very schematic way and that he does not formulate it with the same words or as crudely as I am doing.

According to W. Robinson, capital has become transnational to elude the social pact that the proletariat imposed on the nation-States. For him, globalization creates a global bourgeoisie and a global proletariat. During the Reagan years, the transnational portion of the bourgeoisie – that became hegemonic – took over the nation States, tying them to the transnational State (in the 70s-80s in the North, and in the 90s in the South). In this sense, the transnational State would express a new class relation between global capital and global labour.

Robinson considers that in this phase a decentralization of production took place. It was no longer the main countries that produced, but rather factories that were located mostly in Third World countries, while the command of production and the control over transnational capital stayed in the North.

The economic globalization of capital – he warns – must not be understood as a phenomenon that is isolated from the transformations in the relationships between classes and States. Nothing less and nothing more. Robinson states that transnational classes are being formed. He says that "*... global class formation of classes has involved the accelerated division of the world into a global bourgeoisie and a global proletariat ... and has brought changes in the relationship between dominant and subordinated classes"*.[16] Reaching this point, I cannot but recall what Marx said, "Proletariats of the world, unite".

One of the aspects that he raises seems to me particularly fertile to interpret the situation that surrounds us: Robison states that global economy is fragmenting national cohesion and has dramatically altered the balance of power between the classes that had been established in the phase of the Keynesian nation-State, to the detriment of the workers.

In particular, Robinson points out that this new relationship between capital and labour takes the shape of the informalization of labour linked to flexible accumulation. In his own words,

[16] ROBINSON, William I., *Social Theory and Globalization: The Rise of a Transnational State*. In Theory and Society, Vol. 30, No. 2 (April 2001), pp-157-200.

> These new systems of labour control rest, in my view, in part, on the disjuncture between nation-state institutionality and capital's new transnational space. They include subcontracting and contract labour, outsourcing, part-time and temporary work, informal work, home work, the revival of patriarchal, "sweatshops", and other oppressive relations. Well-known trends associated with the restructuring of the labour-capital relation taking place under globalization include "downward leveling", deunionization, "ad hoc" and "just-in-time" labour supply, the superexploitation of immigrant communities as a counterpart to capital export, the lengthening of the working day, the rise of a new global "underclass" of supernumeraries or "redundants" subject to new forms of repressive and authoritarian social control, and new gendered and racialized hierarchies among labour. These trends point to the rise of a global proletariat stratified less among national than along social lines in a transnational environment...[17]

I will end this overview with some of the authors advocating for globalization as an immanent phenomenon that belongs in capitalism, to then move to the trend that conducts an institutional analysis of globalization.

As starting point, let us clarify that I don't believe in the neutrality of science. Always, and for social scientists in particular, we have a paradigm that acts as our reference. What I do believe is that we must make it explicit. And thus I am going to do just that with mine.

For me, the institutional current follows the advice of Lope de Vega: "The best of judgements is to accomodate oneself to the times". Or, if you prefer, what Giuseppe Tomasi de Lampedusa said: "*Si vogliamo che tutto rimanga com´è, bisogna che tutto cambi*" (if we want everything to remain as it is, then what is needed is to change everything). My opinion about this current is a few words: it is worthy of *Il Gattopardo.*[18]

Naturally, also among the authors who adhere to this current there are nuances but basically they all argue that globalization is a contemporary phenomenon, a phase of financial expansion and an unstoppable one.

One of globalization's features they most refer to is the fact that in this phase financial capitals move freely while labour is strongly regulated.

---

[17] *Ibid* .

[18] N.T.: "Il Gattopardo" is a novel written by Giuseppe T.di Lampedusa in 1957. The quote included in this article generated a notion that is known as "gattopardism" or "lampedusim" in Political Science and defines the politician or party that agrees to give in or reform something in order to keep the system intact.

Like the other current does, they also point out that globalization has both positive and negative effects, that are the product of its management and not of its essence. One positive effect would be that opening to world trade helps countries to grow faster, while isolation places them at remarkable disadvantage and outside the possibility to develop and grow. Also, it makes available to countries and persons those goods and services that they would not have been able to access in other circumstances; as the isolation experienced by a good part of the world has been reduced, now not only countries and individuals have greater access to knowledge that before was only in the hands of the richest in the planet, but also antiglobalization activists themselves can maximize their actions around and across the world. Foreign investment has fostered and continues to promote the introduction of new technologies, access to markets and the creation of new industries. Foreign aid also benefits millions of persons, to the extent that the projects and programmes funded by the international banks have allowed the countries receiving this help to overcome barriers for their development.

However, these authors do not fail to acknowledge that there are also negative effects, nothing less than the increase in poverty, the deepening and widening of economic and social gaps between countries and populations within countries, and the recent financial crisis.

To maximize the positive effects of globalization and mitigate the negative ones, what this current basically proposes is the following: redesigning the Bretton Woods institutions, "fair trade", restructuring foreign aid by increasing the developed countries' contributions; imposing taxes on the capital circulating in the world economy; replacing the dollar standard by an international currency that is not linked to any particular country, issued by a restructured International Monetary Fund, etc.

For these gentlemen – and this is why I have started by quoting from *Il Gattopardo* – the issue is not capitalist globalization or the market ideology, but rather the problem lies in what they call 'market fundamentalism', embodied by neoliberal administrations like those of Thatcher or Reagan, irrational and dangerous for the survival of capitalism itself.

Their solutions: to make globalization work and turn it fairer, because to leave it behind is not feasible or desirable. It must be redesigned, reforming the Bretton Woods institutions. That implies no more and no less that reformulating the Monetary Fund, the World Bank and the WTO. Truth be told, the writing of these authors does not lack certain doses of realism, as they acknowledge that this is going to be a difficult task.

I will refer basically to two of the main exponents of this current: George Soros – a global multimillionaire, who has been awarded a large number of awards, has a charity foundation and pretends to be a philosopher – and Joseph E. Stiglitz.

Let us begin with Soros. For him, globalization is a recent phenomenon, that came in the wake of the collapse of "real socialism", generated by the weakening of the controls over the movements of capital that were imposed by the Bretton Woods institutions, driven by the oil crisis and the policies of Reagan and Thatcher. It is not an irreversible process and this is a concern for him, as – in his opinion – globalization is indeed a desirable process at many levels.[19]

The risk posed to the continuity of globalization is the existence of market fundamentalism, that Soros defines as a position advocating for the distribution of resources to be left in the hands of the market dynamics, as any interference will reduce the efficiency of the economy, as markets are effective in creating wealth but not in guaranteeing the satisfaction of global needs. [20]

From his moralizing vision of economy, the difficulty lies in the fact that markets are amoral and it is precisely for that reason that they are efficient, but a society cannot live without differentiating between right and wrong,[21] and that distinction falls under the political sphere. Thus, he considers that markets need this intervention as well.

According to Arrighi, Soros states that *"... untrammelled intensification of laissez-faire capitalism and the spread of market values to all areas of life is endangering our open and democratic society. The main enemy of the open society, I believe, is no longer the communist but the capitalist threat*"[22]. In other words, Soros believes that once the socialist bloc has imploded, it is neoliberalism – that he calls "market fundamentalism" – that poses a risk for capitalism, because in his view the involuntary coalescence between the far left and the far right have managed to undermine the few international institutions we posses.*[23]* He regrets that, because he believes that we need stronger international institutions.

---

[19] SOROS, George. *Globalization*.
[20] *Ibid* .
[21] *Ibid* .
[22] ARRIGHI, Giovanni. op.cit.
[23] *Ibid* p. 30.

One of the authors in this current is Karl Polanyi, who affirms that in order to minimize the risks that the imposition of accelerated globalization entails, *"a slow-down in the* rate *of change as the best way of keeping change going in a given* direction *without causing social disruptions that would result in chaos rather than change*." [24]

For me, the most intelligent and interesting author in this school of thought is Joseph E. Stiglitz, a Neo-Keynesian economist who was awarded the Nobel Prize for Economics in 2001, was part of the Clinton administration and Vice President of the World Bank. The descriptions he gives of globalization's evils are worth reading, as sometimes they are stronger than those of the more critical schools of thought!

Stiglitz says straightforwardly that current globalization is not working for many of the poor on the planet, for the environment and for the stability of global economy [25]. He also points out the fact that we live from one crisis to the next – the Asian, Tequila, Tango, etc. I recommend reading him, particularly for his analysis of the role played by the IMF and its "recipes" for unleashing the crisis in Third World countries.

However, he also states that globalization can be redesigned so its potential for good becomes a reality and he expresses his belief that international institutions can be redesigned to this end.[26]

I don't want to end my presentation without quoting Frei Betto, an advocate of Liberation Theology who has also been an advisor to (the Brazilian president) Lula da Silva. He says:

> For the anti-utopians who no longer believe in a post-capitalist society ... capitalism would be perverted in its abuses but not in its essence. Thus they believe it is possible to "humanize" it, without realizing the connections between Wall Street and Ethiopia.[27]

Let that never happen to us. Let us never abandon utopia.

---

[24] *Ibid* .

[25] STIGLITZ, Joseph E. *Globalization and Its Discontents*. New York: Norton, 2002.

[26] *Ibid*.

[27] BETTO, Frei. Está prohibido soñar, Adital, Noticias de América Latina y El Caribe, Brazil, September 12, 2007. (our translation) .

BIBLIOGRAFÍA

AMIN, Samir. - *Les défis de la mondialisation*. L' Harmattan, Paris, 1996.

———————— *Capitalism in the Age of Globalization: The Management of Contemporary Society*. Zed Books, London, 1997.

———————— *Obsolescent Capitalism: Contemporary Politics and Global Disorder.* Zed Books, London, 2005.

ARRIGHI, Giovanni. *State Sovereignty, and the 'Endless' Accumulation of Capital*. Available at: http://fbc.binghamton.edu/gairvn97.htm

————————"The Winding Paths of Capitalism", interview by David Harvey. New Left Review 56, March-April 2009. Available at http://newleftreview.org/?view=2771

BELLO, Walden. *Capitalist crisis and response.* Focus on the Global South, April 27, 2009. Available at http://www.all4all.org/2009/06/3514.shtml

BORÓN, Atilio *et al.* "Pensamiento único y resignación política: los límites de una falsa coartada" in *Mundo global, ¿guerra global?*, Ediciones Continente, Buenos Aires, 2002.

HOPENHAYN, Benjamin and VANOLI, Alejandro. *La globalización financiera. Génesis, auge, crisis y reforma,* editorial Fondo de Cultura Económica, Buenos Aires, 2001.

LUXEMBURG, Rosa. *The Accumulation of Capital*; Edited by Dr. W. Stark, London, Routledge and Kegan Paul Ltd; 1951. Translated: (from the German) by Agnes Schwarzschild. Available at http://www.marxists.org/archive/luxemburg/1913/accumulation-capital/index.htm

ROBINSON, Willam I. *Social Theory and Globalization: The Rise of a Transnational State*. In Theory and Society, Vol. 30, No. 2 (April 2001), pp-157-200.

ROMERO BIDEGARAY, Inés. "El debate sobre la globalización", Material de circulación interna de CLADEM, Lima, 2008.

SOROS, George. On *Globalization,* Public Affairs, New York 2002.

————————*The Crisis of Global Capitalism: Open Society Endangered*. Public Affairs, New York, 1998.

STIGLITZ, Joseph E. *Globalization and Its Discontents*. New York: Norton, 2002.

———————— *Making Globalization Work*, New York: Norton, 2006.

TOMASI DE LAMPEDUSA, Giuseppe. *The Leopard*. Translated by Archibald Colquohun. Pantheon Books, New York, 1960.

3. SOCIAL-POLITICAL DIMENSIONS OF GLOBALIZATION[1]

Thaís de Souza Lapa[2]

1. INTRODUCTION

With the aim of contributing to understanding the phenomenon of globalization, I will approach some aspects of its political dimensions, focusing on the nation-State, inequality, exclusion and international migration. I will also point out some of the impacts of this phenomenon on women's lives.

A good portion of theoretical reflection on the social-political transformations resulting from globalization is developed in a framework affirming that it is a capitalist expansion phenomenon. As this process of expansion moves on, some authors identify the changes emerging while others emphasize the persisting elements and adaptations in the State's role as an active organizer of the global capitalist system.

One of the frameworks defining this period is the post-Second World War, bringing with it the decline of the Welfare State[3] – that also opens spaces for strengthening the third sector (NGOs) – and the rise of neoliberalism. With the relative withdrawal of the

[1] This work was produced on the basis of Chapter 4 of "Debates on globalization" by Ines Romero Bidegaray, Lima, 2008, CLADEM's internal document, a revised version of which is also published in this volume.

[2] Feminist sociologist and activist. Currently works as researcher for the Citizenship and Reproduction Commission, an agency advocating for women's sexual and reproductive rights. Together with Tamara Amoroso Goncalves (CLADEM) she conducted a research in 2008 on "Aborto e religiao nos tribunais brasileiros" (Abortion and Religion in Brazilian Courts), with the support of CLADEM. Her main topics for study and advocacy are the Sociology of Labour, with emphasis on female labour and reproductive rights. She is a member of CLADEM-Brazil.

[3] It is worth mentioning that some analyses see the Cold War process as driving the development of social policies like those of full employment or the redistribution of wealth for the world population, as the countries known as being part of the *socialist bloc* are considered pioneers in advancing these policies and singling out the capitalist system as engendering inequalities. This could have forced the *capitalist bloc* countries to adopt and implement social policies that gave rise to the welfare states in those countries. Thus, these States did not simply made concessions to their citizens but were also acting in the context of a global dispute and measuring their strength against that of the other bloc, in order to determine which project was best for the development of societies.

State from fulfilling its role in defence of implementing citizens' social rights, social and economic inequalities become more explicit; this is an aspect we will also develop.

Another relevant transformation that helps understanding globalization as a capitalist phenomenon is the internationalization of the production of goods, the emergence of international corporations and the new international division of labour. This period is also marked by the creation of international bodies like the UN, IMF, WB, WTO, NATO or OAS; by regional integration through *blocs*, like the European Union, NAFTA, Mercosur, CAN (Andean Community of Nations) and others. In general, it is possible to speak of a transnationalization of relations, through an increase in the flow of information, people and merchandise.

2. THE NATION STATE AND THE SOVEREIGN STATES SYSTEM

During the Cold War period, the world was ruled by a system based on two blocs: the capitalist bloc, led by the USA, and the socialist bloc, lead by the USSR. This global order constituted the parameter by which each location tried to fit in the dynamic-world. With the fall of the Berlin wall that represented the beginning of a new world order – the end of the bipolar order – for many globalization acquired an "undetermined, unruly and self-driven" nature, becoming a *new world disorder*. However, for Bauman this idea apparently has been replaced by the notion of *universalization*, that together with the notions of *civilization, development, convergence* and *consensus*, conveyed an idea of hope, intention and the resolution to *create a new order* at the universal, truly global, level. This idea emerged during the periods of rising tides in the resources of the great powers, and expressed the intention to improve the world, extending changes and improvements to a global dimension.[4] According to Bauman, none of that remains in the meaning that globalization has in current discourses. Nowadays, the term rather refers to global effects – that are clearly unwanted and unexpected – than to well-intended initiatives.[5]

[4] It is important to take into account that this notion of a creation of a "truly global" new universalizing order that appeared after the fall of the Berlin Wall, presented socialism as defeated and capitalism as the "example" of an economic system to be followed.

[5] BAUMAN, Zygmund. *Globalization: the human consequences*. Columbia University Press, 1998.

2.1. Globalization as the expansion of the capitalist system

Many of the "theoreticians of the system-world understand that the capitalist system functions as an integrated "world-economy", operating in the framework of a political system structured in sovereign States ... In each phase of the system's stable expansion, there has always been a core that organized the expansion of global production and trade, harvested its benefit more than any other and held economic and financial power also more than any other".[6]

In this way, the gradual formation and expansion of the capitalist world-system has functioned on the basis of territorial organizations possessing the resources and structural position required to organize capitalism as a whole and to impose the rules, normative environments, etc. that allow the system to function (Robinson, 2000). Arrighi calls these organizing centres "tracklaying vehicles" that in each new stage of the system's expansion, always preceded by a stage of financial crisis and expansion, take the place of the territorial organization leading the expansion in the previous phase. According to Arrighi, always in this recurring process, in which each new substitution occurs in response to the crisis of the territorial organizations that had led the previous expansion, the crisis of the nation-State would not be a new phenomenon.[7]

Even though this view of the subject – that can be found at the basis of many discussions around the relation between economic globalization and the nation-State – is not unanimous among the authors writing on this topic, most acknowledge that the system of sovereign States is key for the development and expansion of the capitalist system in the industrial age. This phase is known as *capitalism with national roots*, where capital and territory are linked in a relationship in which the nation-State played a key role, as production remained anchored to the space it controlled, a control that was carried out by national business, based within the borders of the nation-State.

It is worth noting that these debates and theorizations took place in and for societies in which national States consolidated themselves in a full industrial capitalist process, that is, the developed countries. It is not possible, then, to automatically apply them to Latin

[6] ROMERO, Inés, Debates on Globalization. Lima 2008.
[7] *Ibid.*

American countries,[8] as it is hard to speak of national capitalism as an accomplished form of industrial capitalist development in these countries, and even less of welfare States.

In the debate on the relation between globalization and the nation-State there are basically two extreme positions and an intermediate one. The first extreme position holds the declining importance of the nation-State and the resultant erosion of the sovereign States system; the second argues that its functions continue to be basically the same and very little has changed in them. The intermediate position, a variation of the latter, affirms that national States are undergoing an adaptation and transformation process and, as a result of it, will not lose their power.

2.2. Thesis of the declining importance of the nation-State/erosion of sovereign States

The trend pronouncing the erosion of sovereign States is known as *hyperglobalist*. Its adherents view the forces of globalization as the seed of the disintegration of national states or of the practice of dissolving their sovereignty in favour of transnational capital powers. According to Zygmunt Bauman, the triad holding sovereignty together – military, economic and cultural self-sufficiency – has suffered irreparable damages.

The basic assumption of this analysis, according to Susan Strange, is that territorial borders no longer coincide with the limits that political authority holds on economy and society.[9] An unbalance was created between State and the market, by which the former lost power in relation to the latter and the main cause for this was the accelerated rhythm of technological and financial changes, as well as the fast integration of national economies in a single global economy. This decline in power reflects the diffusion of power towards other non-State institutions and associations, as well as towards local,

[8] In the countries with a colonial past, the constitution of capitalism happened in a way that was different from that of the dominant countries. These countries underwent late industrialization processes or remained in the condition of providers of raw materials for the dominant countries. In this sense, it can be argued that in peripheral countries the States were never sovereign or autonomous, as their economy was structured and continued to be organized to serve the interests of foreign capital. On the classical forms of constitution of capitalism and its differences in relation to the colonies-countries, and specifically Brazil see ASSUNÇÃO, Vânia N. F. "Constituição do Capitalismo Industrial no Brasil: A Via Colonial". In *Verinotio - Revista On-line de Educação e Ciências Humanas.* Nº 1, Year I. October 2004. Available at: <http://www.verinotio.org/Verinotio_revistas/n1/r1artigo3.pdf.>. Consulted on October 28, 2010.

[9] STRANGE, Susan, quoted by Inés Romero, (2008). "Debates on Globalization". CLADEM internal document.

regional or supranational organizations. It is understood that State authority is being emptied, even though it might seem paradoxical, as a result of State policies.

Samir Amin addresses the problem of the nation-State in the framework of what he considers an insurmountable contradiction for capitalism, as a result of the separation between the capitalist economic management space – that is increasingly being globalized – and its political and social management spaces that are still confined within the nation-State borders. This globalized economic management is done to the detriment of national States and undermines the basis on which its political and social control functions lie, but do not necessarily lead to its extinction. The divorce between the accumulation capitalist sphere – that has moved to the global space – and its reproductive counterpart – that remains constrained within the space controlled by the nation-State – lies at the bottom of the erosion of the self-centered national State, that marked the development and expansion of capitalism in the phase that culminated in the post-war systemic crisis around 1970 (Romero, 2008).

However, David Held affirms that the fact that States are operating in an international system that is increasingly complex limits their autonomy (in a radical way, in the case of some spheres), progressively undermining their sovereignty. Thus, nowadays sovereignty must be understood as a faculty divided between multiple agencies – national, regional and international – and restricted by the very same nature of this pluralism.[10] This author does not deny that international relations undermine the power of the modern sovereign State; his argument is that everything indicates that, in the worst case, the nation-State will not be more than one political actor among others, lacking all kinds of privileges in the international legal order. He confronts those who announce the end of the nation-State, because he considers the State apparatus has the persistent capacity to shape the direction of domestic and international politics.

2.3. Thesis of the permanence and reconfiguration of the nation-State

According to this thesis, the functions of the nation-State are still essentially the same and there have been few changes. It criticizes the scholars who believe that there has been a decline of the nation-State, speaking of the end of the State or of the death of State sovereignty, with the argument that those theses are based on a questionable dualist construction opposing the global to the national, and analyze the

[10] HELD, David, quoted by Inés Romero, (2008). "Debates on Globalization". CLADEM internal document.

economic restructuring resulting from capitalist globalization as if it were a phenomenon that happens independently or outside the political system (Robinson, 2000).[11] This separation traces a dividing line between national and global economies, considered as mutually exclusive, obscuring the possibility of conducting an accurate analysis of the subject, as it leaves aside or ignores the many political-economic interactions taking place between the national States and global economy.

In opposition to the theories about the end of the nation-State, the proponents of this thesis believe that faced with globalization, States adapt and transform themselves. State authority goes through a process of denationalization and the national functions of public governance are transferred to private actors, both national and supranational. This is far removed from the thesis portraying the State as a victim of globalization. On the contrary, it understands national States as working for the development of global economy and driving globalization: thus, deregulation and privatizations are not the result of impositions by powers that are foreign to the State, of the disciplining powers of global capitalism, but of negotiations carried out by the States themselves, with their constitutional status being the best proof of State's active participation in the process. In other words, States lose the function of formulating national policies to take on other functions, restructuring themselves to serve the global capital, including in the formulation of national policies – defined by transnational capital through its network of economic institutions and supranational policies. That restructuring is not the result of an external imposition but of transnational social forces from the global capitalist bloc, embodied by local forces in conjunction with the global economy, capturing the local power structures and generating the necessary conditions for internalizing the authority structures of global capital. Faced with this, William Robinson argues that globalization constitutes a transition from the capitalist nation-State phase to a transnational phase. [12]

Opposing the dualism that places economic globalization on one side and the nation-State (political power) on the other side, Robinson affirms the theory that economic globalization will result in transnational class formation. According to this author, the transnational State constitutes the set of political and economic practices and institutions sustaining, defending and pushing forward the emerging hegemony of a global bourgeoisie and its project to build a new global capitalist historic bloc. Thus, what is being created is an emerging transnational State.[13]

---

[11] Robinson, William, quoted by Inés Romero, (2008). "Debates on Globalization". CLADEM internal document.

[12] ROBINSON, William I. "Capitalist Globalization and the Transnationalization of the State" in *Historic Materialism and Globalization,* Mark Rupert and Hazel Smith (eds.), Routledge, New York 2002.

[13] This statement could be challenged because it treats the bourgeoisie as a unified bloc, without taking into ac-

In a general case, what the authors defending this thesis add is that national States do not disappear or lose power, but transform and change their functions to integrate themselves into the new structure, together with a set of supranational, global and regional political and economic institutions.[14]

2.4. Thesis of adaptation and transformation for retaining power

In this third thesis, the argument is that economic globalization represents a transformation in the way political power is organized, particularly State sovereignty. Their analysis is that the nation-State is immersed in a partial process of denationalization: some strategic elements of State sovereignty (in particular those functioning as institutional spaces for the core globalization dynamics) have been transferred to supranational institutions, non-governmental and private bodies.

States have negotiated this cession as a way to avoid losing power and to take part in globalization, through which they have been territorially and institutionally inserted in national spaces. In this way, it can be argued that States function as coercive and collective action instruments needed for the global economy to materialize itself in global territories. That is, that global capital *needs* to negotiate such materialization by transforming the institutional framework of those spaces, that is, the exclusive jurisdiction of the nation-State over the territory.

Thus, in this process, the State had not been a passive actor or a victim but, on the contrary, a protagonist as it engages in its new roles in the economy, the legal systems and transnational practices, legitimized by the normative production. This challenges the assumptions about deregulation and privatization as expressions of States whose importance is declining or that are losing power, as if they were the result of external imposition or of the impossibility of resisting the disciplining powers of transnational capital (Romero, 2008).

---

count the divergences within it, like the financial, industrial and agro-industrial bourgeoisies. Another consideration to be made is if, within this process of *class transnationalization*, a transnationalization of the working class is not also taking place. The Brazilian author João Bernardo argues that, unlike the capital, workers fail to integrate at a supranational level; rather, they are becoming increasingly fragmented. On this topic see BERNARDO, João. *Transnacionalização do Capital e Fragmentação dos Trabalhadores.* Boitempo, São Paulo, 2000.

[14] Inés Romero, (2008). "Debates on Globalization". CLADEM internal document.

For Held and McGrew, the political space for the development and achievement of effective governance and control over power is no longer identified with a particular political territory. The forms of political organization now imply a complex de- and re-territorialization of political authority. Linked to global change, driven by globalization, State power is also transformed and this happens to the extent that its roles and functions are recomposed, reconstituted and reintegrated to the intersection of networks and systems that are regionalized and globalized. For Held and McGrew, national sovereignty has not been fully subverted, but merely transformed: it has been displaced as an unlimited, indivisible and exclusive form of public power, embodied by an individual State and inserted in a system of multiple centres of power, usually shared with hidden spheres of authority. In other words, according to these authors, there has been a reconfiguration of political power (Held and McGrew, 2007) (Romero, 2008).

3. INEQUALITY AND EXCLUSION

El subdesarrollo latinoamericano es una consecuencia del desarrollo ajeno, que los latinoamericanos somos pobres porque es rico el suelo que pisamos, y que los lugares privilegiados por la naturaleza han sido malditos por la historia[15].

(EDUARDO GALEANO)

The discussion on inequality and exclusion is placed in the context of the transformations that have taken place at two levels: in the territorial organization of economic activities, that involved renewed and different forms of unequal and subordinated countries' integration, and of regions and populations within countries, into global economy; and in the organization of the political power, that implied cuts – voluntarily or not, intentional or not, substantial or not – in national States' capacity to regulate economic, social and political life in their territories (Romero, 2008).

Some assumptions need to be taken into account from the perspective of these analyses: the growing mobility of capital, the global decentralization of production and the centralization of the direction and control of the global economy in transnational capital; unequal international integration; new international division of labour, that brings with it transformations in the systems of inequality and exclusion and, lastly, the assumption

[15] *Latin American underdevelopment is a consequence of the development of others, that Latin Americans are poor because the ground we stand on is rich, and those places that were privileged by nature have been cursed by history.* Eduardo Galeano

that capitalist modernity's mode of social regulation is in crisis and, through the State, it can no longer keep inequality and exclusion at *socially acceptable* levels.[16]

According to Boaventura de Souza Santos,[17] in modernity, inequality and exclusion acquire meanings that are completely different from those in the old regime: for the first time in history, equality, freedom and citizenship are recognized as emancipatory principles of social life. Thus, inequality and exclusion end up being justified as exceptions in a social process that does not bring them legitimacy. The author considers inequality and exclusion as hierarchical membership systems, but points out the differences between them:

> In the inequality system, belonging occurs through subordinated integration while in the exclusion system, belonging occurs through exclusion. Inequality implies a hierarchical system of social integration. Those who are below are inside, and their presence is indispensable. On the contrary, exclusion implies an equally hierarchical system but ruled by the principle of exclusion: you belong according to how you are excluded. Those who are below, are outside.[18]

The same author recognizes that these definitions correspond to ideal types, because in practice social groups are inserted in both systems. Santos affirms that the main theoretical reference to address inequalities is Karl Marx, who articulates them from the perspective of the relation between capital and labour, placing them under a socioeconomic axis. While for exclusion, the main reference would be Michel Foucault, who addresses this topic from an axis of prohibition, as occurs in sexism and racism – that belong in the field of culture and civilization. However, according to Santos, the axes of inequality and exclusion have always been combining themselves within a world system.

He argues that States have as their function to secure social cohesion;[19] that is, they should have the capacity to recognize the different social groups and to learn how to differentiate

---

[16] This statement is based on the idea that there are *socially acceptable* levels of inequality and exclusion that could be achieved by State action aimed at mitigating those problems. It is worth noting that this is not necessarily the ultimate goal to aspire to when analyzing this issue: inequality and exclusion can be approached as intolerable at any level and likely to be overcome when the conditions –born out of the capitalist system - creating or worsening them are tackled.

[17] SANTOS, Boaventura S. "Desigualdad, exclusión y globalización: hacia La construcción multicultural de la igualdad y la diferencia". In *La caída del* Angelus Novus*: ensayos para una nueva teoría social y una nueva práctica política*. ILSA, Bogotá, 2003.

[18] *Idem*.

[19] This notion is based on a broader notion of the State's role by author Nicolas Poulantzas.

among those that should be *assimilated* from those that should be *segregated, expelled or dominated.* For instance, to be able to identify those who are mentally ill, dangerous or criminal from those who are not. Here he argues that globalization has eroded the national States' power of social regulation.

Transformations brought about by globalization, such as the new international division of labour and the decentralization of production, have affected the power of national States to provide full-employment and redistributive policies aimed at mitigating generalized and intolerable inequalities; that is, for Santos, the social welfare State has been undermined as a consequence of globalization. Thus, work – a form of social integration that is able to mitigate inequalities – loses this characteristic when it begins to be more scarce. Thus, for Santos, work stops being a mechanism for inclusion and turns out to be a tool for exclusion. Flexibilization of labour, segmentation of the labour market (resulting in the social *redundancy*[20] of an important number of workers, the industrial army reserve), as well as the precariousness of work and employment (resulting in the weakening of social organization) dissolve those economic and social rights secured by welfare States, turning protection against social vulnerability into something unreal.

Other authors converge with Santos' analysis regarding the crisis of the model for social regulation of inequality. Saskia Sassen addresses inequality in the context of the processes of social marginalization and integration in global cities, arguing about the existence of a new geography of centrality and marginality: for her, the issue of segmentation of the labour market is one way of reinforcing inequalities. Managing and overseeing economic activities and operations that are geographically dispersed demand specialized services – financial, corporative and communicational – as well as a communications infrastructure. This demand has modified the configuration of the urban economy and transformed the labour markets.

While the activities related to the management of these operations have been overvalued, those linked to the traditional sectors of the economy have been undervalued. This reinforces the existing inequalities between the different economic sectors and introduces new dynamics translated into what Sassen calls the "new geography of urban poverty and marginalization".

[20] Here the notion of *uselessness* is problematized, because under capitalism unemployed workers are useful to keep the salaries of employed workers low. These group of workers that is useful to "force down" the salaries of employed workers, and also to inhibit the claims for better conditions of work for fear of being fired, were called by Karl Marx the "industrial army reserve".

Some examples of this polarization can be translated into the value assigned to the urban spaces where great financial centres and high-income individuals are located, in opposition to the growing loss of value and deterioration of the spaces where the moderately profitable or subsistence business and the low-income population are located. The increase of high-income population linked to the leading sectors of the economy stands in contrast with the growing mass of low and medium-skilled workers – considered *useless* – in the same leading economic sectors; or with the growing demand of low-income workers and the decrease in the income for the labour force employed in the traditional sectors of the urban economy.

According to Sassen, who uses data from the USA from those cities known as *global cities*, the service sector is increasing. Besides, the labour sector appears increasingly polarized and segmented, creating a highly qualified and well-paid sector and a low-paid one that sustains the daily functioning of corporative financial services. She also emphasizes the process of femininization and racialization of devalued jobs, demanding a low-skilled, unskilled and low-paid labour force, as one of the features of the segmentation of the labour market in global cities.

For Robinson and Amin, inequality emerges as an intensified form of capitalist polarization, in the context of a break in the class agreement (capital and labour). The agreement between classes had lasted for as long as the capitalist accumulation and reproduction processes were confined within the borders of national States.[21] But the transformations in the capital-labour relation brought about by globalization, had resulted from the new relative power of capital: this had been *liberated* from the spatial limitations of the nation-State, abandoning its responsibilities towards labour.[22] The result of this was the emergence of precarious and deregulated labour systems – subcontracting, temporary, part-time, informal, home-based work – functional to the post-Fordist flexible accumulation system. According to these authors, globalization caused salaries to be levelled *downwards*, un-unionized labour without social security, the extension of the working day, a growing number of workers who are *useless* to the system, new gender and racial hierarchies among workers. In short, a series of backward movements in relation to the already conquered rights in the field of labour.

[21] However, this statement is questionable as in dominant countries, primitive accumulation happened mostly through their colonialist exploitation of other countries.

[22] The following question is relevant in this aspect: could it be that before globalization the State had responsibilities in relation to labour? Here we would like to point out the fragile status of this statement, understanding that the old welfare State (and here we are referring to the dominant countries in which it was developed), used to pay attention to labour rights because of the correlation of forces and provided the economic situation made it viable.

For Amin, polarization is intrinsic to the system, but the difference with previous periods is the use of five monopolies of which countries placed at the centre benefit: technological monopoly; the control over global financial markets; monopolised access to the planet's natural resources; monopoly over media; and the monopoly of massive weapons of destruction. In this new context, the industrialization strategy, on which the development processes followed by the peripheral countries in past decades relied, had ceased to be an eventually efficient mechanism to reduce the gaps separating them from the developed countries placed at the centre of the system (Romero, 2008).

Bauman presents inequality as the expression of a new social stratification resulting from the almost unrestricted freedom of movement enjoyed by some (the global capital and financial elite) before the forced confinement or *forced territorialization* of most people – explained through the fact that *space* (the territory controlled by a nation-State) has lost its power to structure those social relations that are intrinsic to capitalist development.[23]

4. INTERNATIONAL MIGRATIONS

In this section, the relation between economic globalization and the mobility of persons will be addressed. This approach attempts to highlight the fact that the current literature conducts a critical review of classical approaches applied to the analysis of international migration. Traditional literature basically used the notions of temporal migration, permanent migration and diaspora. However, at the end of the 80s new concepts emerged to explain new patterns of migration and settlement of the migrant population, with a *transnational* approach to migration: *transnational communities, transmigration, transmigrant.*

Transnational communities correspond to new social spaces that are transnational and deterritorialized, not disconnected from communities and countries of origin but not assimilated either to the communities and countries of destination: they are *bridges* linking the one to the other. They also encourage and maintain relations linking the societies of origin with the settlements in the destination place at many levels, and function as articulated spaces through exchange and circulation networks for persons, money, goods, information, images and values. This exchange is facilitated by the

[23] Here what is questionable is if the restriction imposed to the mobility of persons is really the result of a loss of power on the part of the State. Are States not responsible for formulating policies restricting the mobility of most persons and allowing it only for a small portion of them?

development of information technologies that are transforming the places of origin and destination into a single community, dispersed in a multiplicity of places.

This is how a dense social fabric is created as well as reproduced, consolidated and transformed in the framework of the complete interaction between those relationships developed, that can be kinship and friendship links and relations, but also those of community-based identities – based on relations of trust, reciprocity and solidarity – even contributing to the protection of its members against situations of social and political vulnerability. Another relevant aspect is that the dependency of communities of origin on those of destination, makes the former change. An example of this is the Mexican migration towards the USA, where it is possible to argue that there was an adaptation by migrants to the US labour market.

4.1. Motivations of migration movements

Migration movements existed long before the current stage of globalization and as such are not a result of it, unlike what some authors argue. In this sense, sociologist Saskia Sassen points out that "the task is to understand in what ways and under what conditions today's many migrations are or are not shaped by, grounded in or merely inflected by globalization". [24]

This author also argues that economic and demographic analysis often explain the configuration of international migration movements from *push-pull* factors, that are basically linked to economic conditions. The main pull factors would be unemployment and poverty, while the main push factors would be better employments and pay. For Sassen, the analysis based on push-pull factors is insufficient: "... push-pull factors may explain why some people move, but they cannot explain why a majority of people in similar conditions do not move*"*.[25]

Sassen conducts an analysis taking into account push and pull aspects, considering additional variables transforming these conditions into motivation for emigration – based on sociology and anthropology – like, for instance, poverty, an important pull factor but one that does not motivate all poor persons to emigrate. Then, we need to ask under which conditions poverty effectively works as a pull factor.

---

[24] SASSEN, Saskia. *A Sociology of Globalization.* Norton, NY, 2007. p. 129.
[25] *Ibid*. p. 121.

She holds that there is a geoeconomy of migration, identifying as push factors for migration flows, alongside those that are often mentioned – poverty, unemployment and overpopulation – the following: political and economic bonds (colonial, neocolonial, military); links created between emigration and immigration countries in the context of economic internationalization and decentralization; organized exportation of legal and illegal labour. These flows, initially driven by those factors end up becoming autonomous and generating a type of *chain migration*:

> The large mass migrations of the 1800s emerged both as part of and contributed to the formation of a transatlantic economic system binding several nation-states through economic transactions and wars, particularly war-induced flows of people. This transatlantic economy was at the core of the development of the United States. Massive flows of capital, goods and workers and specific structures produced this transatlantic system.[26]

This process has contributed to promote information exchanges on employment opportunities, settlement places as well as facilities for moving from one location to another.

As a consequence, what we call immigration is analyzed as the result of a set of processes involving public (State) and private (corporations hiring labour) institutional structures, historical formations in the countries of origin and destination, that we need to study if we want to understand its contemporary conditions, together with the ideological representation and the subjective meaning that migrations acquire from migrants themselves.

4.2. Restrictions to migration movements

On the other hand, the literature on the issue[27] points towards the existence of restrictions applied to individuals' mobility in opposition to the almost unrestricted freedom of movement that capital enjoys, thanks to the liberalization of markets. In this sense, it is worth emphasizing that advanced economy States continue to have rigid policies for restricting the mobility of persons. The issue of free-trade agreements, that liberate mobility only for the number of professionals needed for international economy operations, needs to enter the debate.

[26] *Ibid,* p. 135.

[27] BAUMAN, Zygmund. *La globalización: consecuencias humanas.* Fondo de Cultura Económica, Buenos Aires. 1999.

In this sense, it is possible to affirm the existence of a stratification of migration, on the basis of education: highly qualified professionals coming from developing countries are encouraged to migrate, while for (most) unskilled labour professionals their mobility is more rigidly controlled. As a consequence, the latter end up living in illegal situations, with low salaries, in precarious conditions and without social protection.

4.3. Migration and women

There are about 200 million migrants every year, including legal, illegal migration and displaced persons. The number of illegal migrations is estimated at between 30 and 40 million (UNFPA: 2006). Among those displaced, about 50% are women and girls. Among the emigrants to developed countries, the number of women surpasses that of men. Research also indicates a growing trend of independent immigration by women.

Studies by UNFPA also show a process of feminization of the low-income labour demand in developed countries. This process may be related to technological changes and to the displacement of the urban economy to the service sector. Even though women still appear in a lesser proportion as immigrant labour force, a more marked occupational concentration has taken place: more than half of migrant women are factory or domestic workers. These jobs have as a feature the demand for low or no qualification, and are thus configured as precarious employment, both in terms of work conditions and of salaries. According to UNFPA, in different countries domestic service is one of the main sectors driving international female migration. This growing demand is directly related to the increase in the number of working women; the increase in the number of elder population; reforms in social protection systems implying a decrease of social contributions and lower salaries, allowing middle or lower income families to be able to hire full or part time domestic or care services (Romero, 2008).

REFERENCES

ASSUNÇÃO, Vânia N. F. "Constituição do Capitalismo Industrial no Brasil: A Via Colonial". In *Verinotio - Revista On-line de Educação e Ciências Humanas. Nº 1, Año I*. October 2004. Available at: <http://www.verinotio.org/Verinotio_revistas/n1/r1artigo3.pdf.>. Consulted on October 28, 2010.

BAUMAN, Zygmund. *Globalization: The Human Consequences*. Columbia University Press, New York.

BERNARDO, João. *Transnacionalização do Capital e Fragmentação dos Trabalhadores.* Boitempo, San Paulo. 2000.

HELD, David. *Democracy and the Global Order. From the Modern State to Cosmopolitan Governance*. Stanford University Press, Stanford, CA.

ROBINSON, William I. Capitalist Globalization and the Transnationalization of the State" in *Historic Materialism and Globalization,* Mark Rupert and Hazel Smith (eds.), Routledge, New York 2002.

ROMERO BIDEGARAY, Inés. "Debates on Globalization". CLADEM internal document.

SANTOS, Boaventura S. "Desigualdad, exclusión y globalización: hacia la construcción multicultural de la igualdad y la diferencia". In *La caída del* Angelus Novus*: ensayos para una nueva teoría social y una nueva práctica política".* ILSA, Bogotá. 2003.

SASSEN, Saskia. *A Sociology of Globalization*. W.W.Norton, Inc., New York, 2007.

STRANGE, Susan. *The Retreat of the State. The Diffusion of Power in the World Economy*. Cambridge University Press, 1996.

4. CULTURE AND ITS MANY FACES IN THE ONGOING GLOBALIZATION PROCESSES[1]

Analía Aucía [2]

1. PRESENTING THE PROBLEM

In the opinion of Boaventura de Sousa Santos (2003), the growing interest in the cultural aspects of globalization emerged in the 80s, when the emphasis on the analysis of socio-economic phenomena and social sciences moved to the cultural sphere. The problem lies in understanding the role of cultural and normative dimensions in the globalization process. Do they play a primary or a secondary role? Those who believe that it is a secondary role, point out that "global capitalist economy is based on political-military power and the interdependence of the market", while those who consider that the cultural dimension is stronger emphasize that cultural dominance, political power, values and institutional norms predate the dependence on the market in the world system (Santos, 2003:187).

In this dimension, the axis of the debate lies in the relationship between cultural *homogenization* and *heterogenization*. To address this interaction we need to consider another pair of concepts that are closely linked: global culture/local culture.

---

[1] This presentation was shared in the workshop called *Globalization, its effects on women's lives*, that took place in Lima, Peru, October 14-17, 2009. It is based on essay *Debates on Globalization* (2008), by Inés Romero Bidegaray, in this same volume.

[2] Argentinean lawyer and feminist. Teacher and researcher with Universidad Nacional de Rosario, Argentina. Legal advisor on gender and women's human rights for the Human Rights Secretary, Ministry of Justice and Human Rights, Santa Fe Province, Argentina. Affiliated to the Centre for Human Rights Studies and Research, Law School, and Centre for Women's Studies, Humanities and Arts School, both at Universidad Nacional de Rosario. Current coordinator of CLADEM Rosario.

For some theoreticians, the forces creating homogeneity and heterogeneity are antagonistic and in permanent tension. However, for most authors that tension is only apparent. Ronald Robertson believes that there is a tendency to think of globalization "in connection to large scale phenomena", "macrosocial" as opposed to microsocial phenomena, and to understand them in such a way that the homogenizing forces of globalization dominate other existing forces, leaving out of consideration the local dimension and even historical processes.[3] According to Inés Romero, "cultural homogenization is a process through which the elements belonging to a particular local culture (ideas, messages, objects, practices, etc.) are transmitted to and take root in other cultures, replacing the elements that belong to those cultures or to the societies in which the dominant culture penetrates".[4] In this view, there are passive societies or cultures that absorb the cultural elements given out by other cultures, with which they come in contact. The societies that produce and circulate culture and play a dominant role are considered to be North America and Europe. That is why the so-called cultural homogenization processes are also known as "Americanization" or "westernization".[5] All this is part of a certain and very widespread mythology that clouds the understanding of globalization.[6]

The challenge then is to go beyond understanding the idea of these tendencies as opposed to each other, and not of choosing between *homogenization* and *heterogenization.* Robertson invites us to reflect on how both have come to constitute life-styles implying both tendencies at the same time. "Finally, both simultaneous tendencies complement and penetrate each other, even when in concrete situations they certainly can clash – and do so."[7]

---

[3] *Robertson, Roland.* "Glocalization: time-space and homogeneity-heterogeneity", in *Global Modernities*, Mike Featherstone, Scott Lash and Roland Roberston eds. Sage Publications, 1995. p.25-44. The author prefers the term "glocalization" to "globalization", to emphasize the fact that globalization is not a consequence of modernity but rather it was glocalization that enabled the spread of a generalized modernity.

[4] Romero, Inés. Virtual dialogues, May 11, 2009, CLADEM.

[5] Santos challenges this aspect by pointing out that it remains to be seen if what is called "globalization" should not in fact be considered "westernization" or "Americanization", given that "the values, cultural artifacts and symbolic universes being globalized are Western ones and sometimes specifically North-American". For instance: political democracy, economic rationality, utilitarism, prevalence of the law, publicity, Internet, etc... Sousa Santos, Boaventura. *La caída del* Angelus Novus*: ensayos para una nueva teoría social y una nueva práctica política*. In Clave Sur, Universidad Nacional de Colombia - ILSA, Bogota 2003, p. 187).

[6] Robertson, Roland (1995). The author believes that this is also because globalization processes "have made little effort to link the discussions on time-space with the controversial issue of universalism-particularism".

[7] Robertson, Roland (1995). For instance, we find that the cultural notion of national States is a "global fact", however, each national State has incorporated a different mix of ideas coming from other national States (1995).

2. TRANSFORMATIONS IN THE IDEAS OF SPACE-TIME

Technological development has brought about deep changes in the structure of communities, be they local, regional or national. Time and space categories acquired a different dimension after the technological revolution, basically due to the development of communications and microelectronics, with the power to undermine and erode those wholes, as they deprive the territory of its value and ability as a provider of identity (Bauman, 1998).[8] Language, nationality, territory and other similar markers of belonging to a community, have been weakened – among other factors – by the current modes of transnational communication in which the nation-State is left without the possibility of exerting its control. In relation to this, Arjun Appadurai (1996) introduced the idea of *virtual neighbourhoods* to refer to those communities created by new electronic communications that are no longer linked to or limited by a particular territory or political state. These neighbourhoods exchange information and build relationships involving different dimensions of life and, according to this author, are able to mobilize and circulate ideas, opinions, money and social relationships, etc. (Appadurai, 1996).

Santos considers that, in order to understand the transformations taking place in the social space-time process,[9] it must be analyzed keeping in mind power relationships, as they determine different types of mobility across space. He affirms the existence of a transnational capitalist class that has appropriated the understanding of time-space and is able to use it for its own benefit, while there are also subordinated groups or classes that lack any control of this understanding. He warns that there are also those "contributing to globalization in a significant way who are nevertheless prisoners of their local space-time" (Santos, 2006:349, translation ours). As an example, he mentions the peasants in Peru, Colombia or Bolivia, who by planting coca become key contributors to "the global drug culture, while they remain more localized than ever" (Santos, 2006:350, translation ours). The same can be apply to those living in the Rio de Janeiro *favelas*, who are prisoners of their existence in a hovel "while their songs and dances are now part of a globalized music culture" (Santos, 2006:350, translation ours).

[8] Bauman, Zygmunt (1998): *Globalization: The Human Consequences*. Columbia University Press. Quoted by Romero, Inés (2008).

[9] Santos defines time-space as "a social process by which phenomena become accelerated and circulate across the globe" (2006:349).

3. THE GLOBAL–LOCAL ANTINOMY

Theoretical reflections challenging the apparent polarization or tension between cultural homogenization and heterogenization believe that this vision is the product of understanding the global and local spheres as separate and exclusive. Most authors deny the existence of a *global culture*. John Tomlinson affirms that if *global culture* is understood as one single culture for everyone on earth and replacing the diversity of cultural systems, such a culture has not yet come to be. (Tomlinson, 1999).

Santos points out that the notion of global culture has been one of the key products of modernity since the 17th century. Already in the 16th century "the ideological hegemony of European science, economics, politics and religion caused, through cultural imperialism", some degree of isomorphism, hybridity and convergence among different cultures (Santos, 2003, translation ours). For this author, culture is, by definition, "a global process built on the intersection of the universal and the particular", and it also means "a struggle against uniformity". Confronted with the dominant processes by which "cultures defined as universal in an imperialist way" are imposed, what has emerged have been "cultural resistance, identification and indigenization processes" (Santos, 2003, translation ours).

Robertson points out that "the same idea of locality is taken sometimes as a way of opposing or resisting global hegemonies", as they would come to represent "the *universal* hegemonic of dominant cultures and/or classes".[10] Thus, in his view, there is a need to abandon the idea that the global dimension excludes or is opposed to the local one, as globalization implies links among localities, while also resulting in the "invention" of those localities (Robertson 1995). Some of the examples he mentions include the attempt by the World Health Organization to promote *world health* by revitalizing local *Indigenous* medicines or the attempts to organize the defense of native or Indigenous peoples at the global level" (Robertson, 1995).

The popular viewpoint on this issue among intellectuals is that the whole world is inundated by Western culture and, more specifically, by North-American culture.[11] Robertson rejects this lineal vision and calls attention to the fact that cultural messages

[10] Robertson, Roland, (1995: 6).

[11] The author refers to *American culture* when he is actually meaning North-American (USA) culture. This might be read as evidence of the hegemonic pretence of US culture. In popular speech and also in academic circles, the words "America" or "American" are used as synonyms for the USA and its citizens. Robertson, (2000).

coming from a *centre* are received and understood in a *differentiated* way by *local* groups, while some "symbolic resources that appear to be *national* are increasingly accessible to differentiated global consumptions and interpretations[12], in the same way as practices and ideas from the so-called Third World flow to reach those societies and regions considered to be dominant (Robertson, 1995).

Tomlinson challenges those positions tending to believe in the existence of a capitalist monoculture. One of the main advocates of this position is the Marxist theoretician Herber Schiller, who links capitalist culture to US culture and states that "the transnational corporations' economic and political power and its global outreach is accompanied by the ideological power able to define world cultural realities" (Tomlinson, 1999).[13] For Tomlinson, there is always an interpretation, translation, mutation, adaptation and indigenization process among the different cultural and geographic spaces, and this is because the receptive culture uses its own resources to dialectically influence cultural importations.[14] (Tomlinson, 1999).

4. GLOCALIZATION AND CULTURAL HYBRIDITY

According to Romero (2008), the processes through which the global and local dimensions interact in the field of culture are basically described in terms of cultural *glocalization* and *hybridity.*

Several authors used the term "glocalization", coined by Robertson. He affirms that the local can be considered one aspect of globalization, as it has implied the reconstruction and to a certain extent the production of *home, community* and *locality.* The concept of globalization has assumed the simultaneity and interpenetration of what have conventionally been known as global and local or – in a more abstract way – universal and particular levels (Robertson, 2000). In its current form, globalization has been reconfigured in such a way that glocalization processes have become constitutive features of contemporary globalization (Robertson, 2000).

[12] Shakespeare, for instance, has been the object of very different cultural interpretations and staging

[13] Herbert Schiller takes the power of transnational media as an example, as they are the focus of his studies.

[14] Tomlinson (2001) quotes Appadurai, Lul and Robins, among others, to substantiate this affirmation.

According to Tomlinson, hybridity refers to a trend in cultural analysis that emerged out of Latin American experiences insisting on the dynamic interaction between external cultural influences and local cultural usages. One of the decisive aspects of this trend is the concern about the nature of the cultural mixes and hybridity, more than about the nature of the cultural imposition by the developed world itself (Tomlinson, 1999). Néstor García Canclini elaborates on the concept of "hybridity" that he defines as "socio-cultural process in which discrete structures or practices, that had a separate existence until then, are combined to create new structures, objects and practices". It is worth mentioning that the "structures called discrete were the result of a hybridization process and as such they can not be considered as pure sources" (García Canclini, 2000: 8). This results in *hybridization cycles*, that describe the transit from one cultural form to another. The continuous and varied hybridization cycles render the notion of identity relative, as it is no longer possible to find *pure* or *authentic* identities (García Canclini, 2000: 8). This concept has proven itself useful "not only to name the mix of ethnic or religious elements (*mestizaje* and syncretism)" but also those involving products of advanced technologies and of modern or post-modern social processes (García Canclini, 2000: 13).

5. CASE STUDIES REFLECTING THE IDEA OF MULTIPLE GLOBALIZATIONS

The representative case studies presented by Peter Berger and Samuel Huntington,[15] and including China, Taiwan, Japan, India, Germany, Hungary, Turkey, South Africa and Chile, exhibit features "confirming the thesis that the interaction between the global and local levels produce differentiated responses".[16] In the case studies it is possible to see the existence of an emerging global culture with a strong US origin and content, that is circulated basically through popular and elite culture. Berger points out that, almost everywhere, what has been called *glocalization* is taking place: "global culture is accepted but with significative local modifications" (Berger, 2002).

[15] *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (ed.). Oxford University Press, 2002.

[16] The authors present four types of situations or consequences likely to be produced by those interactions: a) local culture being replaced by globalized culture (selective homogenization); b) coexistence of global and local cultures, without significative fusions; c) synthesis between glocal and local cultures; and d) rejection of global culture. Quoted in Romero, Inés (2008).

The case studies explore the following four processes:

a) The international business culture (known us *Davos culture*[17]): tends to create "a homogeneity that is more apparent than real".[18] Some examples include: a) the so called *young yuppies* in whom the international business culture shapes a cosmopolitan identity, that does not necessarily impregnate all aspects of their lives, particularly at the personal level; b) In India, China, Taiwan or Japan,[19] the business and international economic elite combine life-styles based on traditional values with practices and behaviours that are typical of the international business culture. Individual practices and behaviours show a dual nature, even though the emphasis is on the Western corporate style.[20]

b) Popular culture (also known as *McWorld culture*). This constitutes the most evident manifestation of the presence of an emerging global culture",[21] even with the differences born from the variety of ways in which local cultures position themselves in relation to that emerging global culture. According to Berger, "It is propagated through business enterprises of all sorts (Adidas, McDonald's, Disney, MTV, etc.)" (Berger, 2002) and impregnates local societies, frequently through the urban middle classes, generating reactions of "passive acceptance, cultural hybridity or a revival of local cultures".[22] In South and East Asia (India and Japan) the answer to this global culture has not been passive acceptance. Among other things, it has been noticed that fast-food businesses have been forced to change the architectural design of their sales points, the type of service they provide and even the way in which they make their products, that is, those businesses have been forced to adjust to the specific features of local culture.

There are many other forms of cultural hybridity in popular culture, like the mix between Western and African aesthetics in the hairstyles of South African women. With regard to the cases in which local cultures are revitalized, the case of India and Japan are again mentioned, as "with the introduction of Western fast-food chains, traditional fast food stalls have also started to proliferate" (Berger, 2002).

---

[17] This name is because of the annual meeting of the World Economic Forum that takes place every year in the city of Davos, Switzerland. The Forum brings together, among others, corporate leaders and international politicians, prestigious journalists and intellectuals, with the aim of analyzing some of the problems affecting the planet.

[18] Romero, Inés (2008).

[19] Characterized by being *strong* cultures as opposed to *weak* ones.

[20] "In this regard, there would be practically no difference between a German, a British or an Indian". Romero, Inés (2008).

[21] Romero, Inés (2008).

[22] *Ibid.*

c) Intellectual global culture (or *faculty club culture*). "It is carried by a variety of vehicles: academic networks, foundations, nongovernmental organizations (NGOs), some governmental and intergovernmental agencies" (Berger, 2002). According to Berger, this culture seeks to create markets throughout the world to promote "ideas and behaviors invented by Western (mostly US) intellectuals, such as the ideologies of human rights, feminism, environmentalism, and multiculturalism, as well as the politics and lifestyles that embody these ideologies" (Berger, 2002). It is circulated in dedicated spaces and made visible through networks that are funding research among intellectuals and students, through editorial production and also through funding for international activism (Berger, 2002). The degree of influence of intellectual culture differs across local spaces. For instance, in Taiwan it is possible to witness "a process of cultural localization, with discourses directly adapted from the West (like environment preservation, human rights and gender equality) that have then been localized".[23] In the case of China, the Chinese Communist Party has not been very receptive to intellectual culture, as this is a space "on which it has always tried to exert direct control"[24] with an aim to strengthen the ideological stances of its own political project.

d) The culture of social and religious movements (human rights, feminist and new religious movements). These movements are also bearers of the emerging global culture that is associated with the spread of Western ideas and generates a critical mass of local intellectuals and activists through which it operates. The international scope of Western movements fosters the emergence of equivalent local movements, "but its capacity to influence their configuration or sustain their continuity is quite varied".[25]

In the field of religious practices, Christian movements, particularly the Catholic and Evangelical Protestant religions, expand from the West into other regions of the world. Meanwhile, religious and secular movements preaching alternative life-style philosophies constitute alternative modes of globalization. One example of this is India, constantly broadcasting ideas, beliefs and practices to the West. Beliefs such as reincarnation, *karma*, the harmony between the individual and Nature, or practices like meditation, yoga, therapeutic massage, martial arts, homeopathic medicine and acupuncture, among others, are constantly circulating from Asia to the West.

[23] Romero, Inés, (2008).
[24] *Ibid.*
[25] *Ibid.*

The different ways to respond to global culture[26] show that the homogenizing forces of cultural globalization are not inevitable or absolute. Cultural globalization creates both homogeneity and heterogeneity, and there is a trend towards heterogenization.

6. MEANINGFUL CONTRIBUTIONS AND CHALLENGES

Lastly, I would like to mention a few notions I find relevant, either as contributions or as challenges at the time of reconceptualizing the cultural globalization processes in relation to human rights and particularly, women's human rights.

Contributions

Robertson makes an interesting contribution to the issue by stating that it would be preferable to replace the notion of globalization with that of *glocalization*, as the latter "has the advantage of taking into account both spatial and temporal aspects" (Robertson, 2000).

As Inés Romero has pointed out, a growing number of academics prefer to speak of *multiple globalizations* (not just a single one), forms of sub-globalization like the one taking place in Europe[27] or in East Asia, as well as of alternative globalizations. Santos clearly states that "there is no single entity called globalization but rather globalizations". This is because because he understands globalization as a process and not as a discrete notion. Thus, he suggests the use of the term globalization in plural. Alternative globalizations are born out of cultural movements, popular or elitist, with a global scope and created outside the West, "but having an effective impact on it" (Berger, 2002). These can be done in an organized manner, like in the case of Buddhist or Islamic movements, or be carried out through the spread of non-organized beliefs and practices, like homeopathic or natural medicine (Berger, 2002).

[26] "The type of response depends, to a high degree, on the cultural resources available to local cultures". Romero, Inés (2008).

[27] "The most representative form of sub-globalization is the European one (the 'europeization' of Europe is seen as a form of response to US globalization) and its most interesting specific feature is the link between europeization and secularization" (Romero, 2008).

Challenges

I consider Garcia Canclini's proposition on hybridization interesting. His view stresses the need for "multinational hybridizations resulting from massive migrations to find recognition in a more open notion of citizenship", that in turn demands "*to reclaim heterogeneity* and the possibility of *multiple hybridizations*" (García Canclini, 2000: 15, translation ours).

From a different perspective, Santos warns that, keeping in mind the hierarchical set up of the global system, it is indispensable to identify the groups, classes, interests and States that define partial cultures as global ones, "and in that way control the political domination agenda under the garb of cultural globalization". He indicates that, even though it is true that the current cultural interdependence and cross-border contacts allowed for building new forms of tolerance, solidarity, cosmopolitism, etc. it is also true that, at the same time, new manifestations of racism, intolerance, Xenophobia and, ultimately, Imperialism, have emerged" (Santos, 2003, translation ours).

In relation to human rights, a central issue for feminists, Santos says that "in many critical senses, human rights policy is a cultural policy" (Santos, 2006, translation ours). However, to speak of culture leads to referring to particularities, differences. He then questions how human rights can simultaneously be a cultural policy and a global policy. To achieve this, he warns, it will be necessary to take into account "both global capacity and local legitimacy, in order to formulate progressive human rights policies" (Santos, 2006, translation ours). Santos considers that if human rights continue to be conceived as universal, they will tend to operate as a form of hegemonic globalization, top-down. The question around the universality of human rights is an individual question, "one of the West's cultural questions". For human rights to be able to operate as a counter-hegemonic form of globalization, as a cosmopolitan force, it must be reconceptualized as multicultural (Santos, 2006, translation ours).

There is no doubt about the challenge this presents to feminist advocacy for women's human rights. And I believe that it is highly interesting and tempting to overcome what Santos calls the false debate between cultural universalism and relativism, and to move towards building cross-cultural dialogues and procedures.

BIBLIOGRAPHY

APPADURAI, Arjun (1996). *Modernity at Large. Cultural Dimensions of Globalization.* University of Minnesota, 1996.

BAUMAN, Zygmunt (1998). *Globalization: The Human Consequences*. Columbia University Press.

BERGER, Peter L. (2002). Introduction. In: *Many Globalizations: Cultural Diversity in the Contemporary World*. Berger, Peter L. and Samuel P. Huntington (comps.). Oxford University Press.

GARCÍA CANCLINI, Néstor (2000). "La globalización, ¿productora de culturas híbridas?". Actas del III Congreso Latinoamericano de la Asociación Internacional para el Estudio de la Música Popular, Colombia. Available at: *ttp//www.hist.puc.cl/historia/iaspmla.html*

ROBERTSON, Roland (2000). "Globalization". In *Global Modernities*, Mike Featherstone, Scott Lash and Roland Robertson eds. Sage Editor, London.

ROMERO, Inés (2008). "Debates on Globalization". CLADEM internal document. Lima.

SANTOS, Boaventura de Sousa (2003***).*** *La caída del* Angelus Novus*: ensayos para una nueva teoría social y una nueva práctica política*. Colección en Clave Sur, Universidad Nacional de Colombia - ILSA, Bogotá.

SANTOS, Boaventura de Sousa (2006). *De la mano de Alicia. Lo social y lo político en la postmodernidad*. Siglo del Hombre Editores, Ediciones Uniandes, Universidad de los Andes, Bogotá.

TOMLINSON, John (1999). "Global culture: Dreams, Nightmares and Skepticism". In *Globalization and Culture,* Polity, 1999, p. 71-105.

SECTION 2

Work, Health and Education. Its Effects on Women's Lives

1. GENDER AND THE LABOUR MARKETS IN LATIN AMERICA*

Alma Espino[1]

It has been a pleasure to come here to be with you and I thank you for this invitation. Today we will discuss the labour markets in Latin America. The questions that will guide the first part of my presentation are the following: What have been the trends in women's participation in the labour markets in the region? What are the main factors to which those trends are attributed? And, what are their implications for public policies?

1. PARTICIPATION OF WOMEN IN THE LABOUR MARKETS IN LATIN AMERICA

As you well know, participation of women in the labour markets – with differences between countries – started to increase in a process that began to gain speed in the 70s. The current rates of participation are quite high in Latin America in comparison with the international level, even though the rates of female participation are still low in some countries like Cuba, Puerto Rico, Honduras, Chile, Venezuela, Guatemala, Mexico and Costa Rica. Uruguay is among the countries with the highest participation rate.

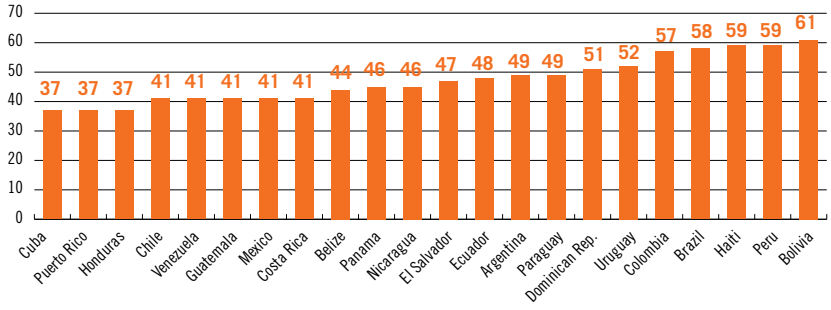
[1] Uruguayan, graduated in Economics from UNAM School of Economics (Mexico City). Researcher with the Institute of Economics, Economic and Management Sciences School, of which she acted as Director from July 2007 until June 2009. Coordinates the Development and Gender Department in the Interdisciplinary Centre for Development Studies – Uruguay (CIEDUR) and the Research Department of the International Gender and Trade Network (IGTN). Lecturer for the Regional Programme on Gender and Public Policies, hosted by the Latin American School of Social Sciences (FLACSO), Argentina. Coordinator and teacher for the Gender and Macroeconomics Group for Latin America and the Caribbean (GEM-LAC). Consultant for ECLAC, ILO, UNSRID, the World Bank, UNIFEM and UNDP.
*This work has been edited by Nicole Bidegain Ponte.

I. PARTICIPATION OF WOMEN IN THE LABOUR MARKETS

- **Between 1990 and 2007, female participation increased from 38% to 50% in Latin America**
- **The lowest rates are to be found in Cuba, Puerto Rico, Honduras, Chile, Venezuela, Guatemala, Mexico and Costa Rica**

When we speak of female participation in the labour markets, we are referring to the proportion of women who, being of a legal working age, are employed or searching for employment. This is what is commonly known as "economic participation" or "economically active female population". The legal working age differs across countries: in some, it is legal to work for a wage after 12 years of age and in others after 14. In El Salvador, the legal working age has now being set as 16 years.

CHART Nº 1 **FEMALE ECONOMIC ACTIVITY RATES 2005**



In comparison, Cuba exhibits a very low rate of female participation while Bolivia has the highest: 61% of women of working age. In any case, for most countries there is a set of cultural factors and economic structures explaining the different levels of female economic activity. A significant one is the degree of formality in the labour markets. The greater the percentage of formal employment – that is, employment with contracts, rights, protected by the law, etc. – and the number of workers receiving wages for their labour in the economy and the country, the lesser the female participation tends to be, because most of the workers are men. And vice versa: the more there is informal labour in the economy, the greater the female participation. Why is this happening?

In the first place, because these are countries with high poverty rates, without universal social security, everybody is forced to engage in any activity that will provide a basic income in order to survive. Nevertheless, the fact that a country has a high rate of economic female activity does not mean that all women have employment and even less that they have good employment.

But, why in spite of everything are we talking of a growing trend and high rates of economic activity in comparison with global figures? Factors favouring this participation include demographic changes such as internal migrations from rural areas to cities, the increase in formal schooling and higher rates of schooling for women, and the reduction of fertility. The latter is a very important phenomenon but it is also a double-faced one. Many of our countries have seen an important decrease in their fertility rates, but if we compare different segments of the population it would seem we are indeed comparing different countries, some with very high and others with very low fertility rates. For instance, in Uruguay those who are having the highest number of children are the poorest women, while those with the highest educational levels show the lowest fertility rates: a society that is reproducing in poverty.

There are also economic factors, like the drop in employment and salaries that were documented in the crisis of the mid-70s or produced by the debt of the 80s. As empirical economic theory was claiming, and reality confirmed, women went to work in order to compensate for the fall in household incomes. But when the economy improved, against what was expected in theory, they did not withdraw from the labour markets; they chose to continue working. Therefore, it is important to highlight the times of crisis as a factor explaining changes in rates of female economic activity; that is, they function as a stimulus for women to enter the market and offer their labour power.

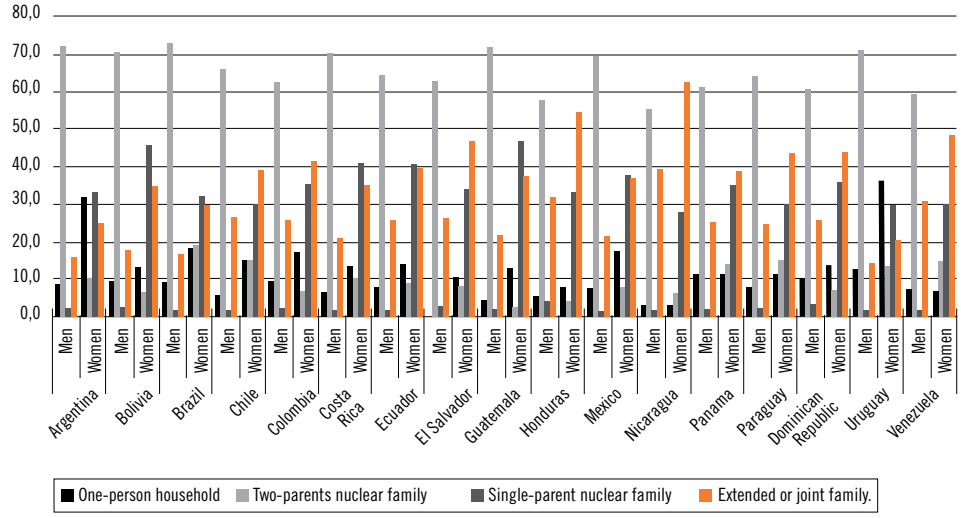
Lastly, we cannot avoid mentioning the productive restructuring and the emergence of export industries, as factors that have encouraged hiring women. This process took place particularly in those countries where reforms encouraged the manufacture and export of some products, as well as in those countries where the opening of the markets basically meant importing manufactured goods. In these cases, women tended to be employed in all services – both traditional and modern – and this was usually accompanied by a series of transformations in daily life, in the home, in the mode of production driven by technological change. Women started to work in the service sector, from the financial systems where they held high quality jobs to the lowest extremes of the outsourced companies providing services like cleaning or security or call centers – large providers of female employment – where the quality of wages and jobs is lower.

What are the main problems that women's participation in the labour markets raises as compared to men's? In attempting to explain women's participation in the labour economy, relationships among several variables need to be traced. A very important factor in deciding if a woman will enter the labour markets or not is her educational level: the likelihood of women participating in the labour markets increases along with their educational levels. But in the case of men, this variable has practically no influence: men work because they are men, regardless of how low their educational levels may be. Women have other opportunity costs, other restrictions or activities in which to be engaged, i.e. housework. That is, women do not have to choose between work and leisure, as the traditional economic perspectives claim, but among paid work, unpaid work and leisure – they have three options. This difference is the basis of many others that can be found between men and women in the labour markets.

With the exception of Uruguay, the lowest rates of female participation in the labour markets are among the poor sectors of the population. Women living in poverty face several restrictions to enter the labour markets: cultural, material, the number of children, and residential segregation in cities. For instance, women living in particular neighbourhoods, colonies or areas can not get work elsewhere, not even as domestic workers. In Uruguay, women living in poverty had very low levels of economic activity but they increased sharply after the year 2000. One stimulus was the economic crisis that we faced in the Southern countries in 2001 and 2002.

A typical feature of the kind of women's insertion in the labour markets is the restriction of the time they have available, due to their workloads of unpaid work. In our societies, culturally and socially, it is a given that women have to take care of unpaid household work.

CHART Nº 2 **PERCENTAGE OF HOUSEHOLDS WHERE WOMEN ARE THE MAIN PROVIDERS, ACCORDING TO THE TYPE OF HOME**



Source: ECLAC

As can be seen in Chart Nº 2, the largest percentage of homes where the woman is the main provider – according to the type of home — corresponds to extended or joint families (Nicaragua, Honduras and El Salvador), followed by single-parent homes that prevail in Uruguay, Costa Rica and Bolivia. In the case of two-parent homes, the proportion of women who are providers is on the increase. A series of studies conducted in some countries across the region show that this increase reflects the fact that women who are married or living in de-facto unions have entered the labour force, because single mothers have historically behaved in a way that is more similar to that of men.

2. THE IMPACTS OF THE ECONOMIC POLICIES OF THE 90S IN THE LABOUR MARKETS ACROSS THE REGION

How have economic policies influenced employment for men and for women, and how have they done it?

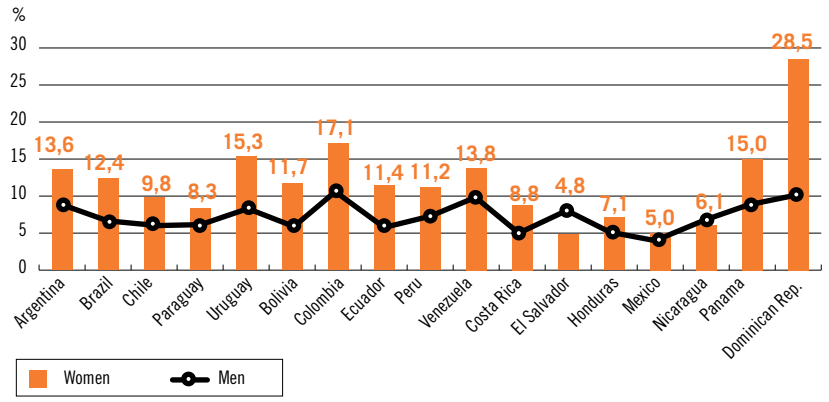
Technological innovation, new forms of production, opening of the markets and financial liberalization have been important driving forces for globalization. Open trade, financial globalization, privatizations that tended to reduce the weight of the State and increase that of the market, were driven by some States, including the USA and the European Union. These economic policies, that are part of the neo-liberal agenda, had an impact on our countries causing very deep reforms in the area of labour.

This combination of factors linked to the process known as globalization, was accompanied by a reduced growth of employment, and an increase in unemployment and in informal employment.

It is worth mentioning that, as economic theory had predicted, trade exchanges indeed brought an increase in the real wages of highly skilled labourers. However, the theory stated that in the beginning the gaps between the wages of low and highly skilled workers would widen, and then tend to balance out, but in reality, the salary gap has not decreased.

In relation to differences between the genders in joining the labour markets in the 90s, it is important to point out some features. The unemployment rates for women doubled during the 90s, going from a regional average of 6.5% to 13%. Two factors influence this data: the impact of changes in the production structure and the impact resulting from more women looking for work. Unemployment rates are related to the number of people looking for work; if women withdraw from the labour markets, unemployment rates tend to go down. In the opposite case, if many women "go out" looking for work, unemployment rates are pushed up and the unemployment gap between women and men widens.

CHART Nº 3 **UNEMPLOYMENT RATES FOR MEN AND WOMEN (2005)**



As Chart Nº 3 shows, in some countries like the Dominican Republic, Panama or Brazil, there are important gaps. In the case of El Salvador, it can also be perceived that female unemployment is lower, and this is related to under-employment among women. Women work fewer hours, are engaged in small economic entrepreneurship projects for survival: they go into the labour markets only one or two days a week, so they don't say they are unemployed but this is a reality that hides unemployment.

Another feature is that unemployment is higher in the lowest-income sectors. In Uruguay and Argentina, during the initial years of the 21st century, the unemployment rates for the poor almost duplicated those of the higher-income sectors, also for women. However, the unemployment gap between the genders did not decrease among those with higher educational levels.

One more feature is that women are over-represented in the informal sector. In 2005, 46.3% of men and 51.4% of women held informal jobs in Latin America: that is, informal employment has a clear gender dimension. There are differences across countries, but it is a regional phenomenon. As shown in Charter Nº 4, according to data from ECLAC, in 2005, 67% of women in Paraguay were in the informal labour sector, as compared to 56.7% of men. In the Andean region, in all countries except Venezuela, the proportion of women in the informal sector was higher than that of men: 60-70% of women worked in the informal sector. In Central America and Mexico, the proportion of women in the informal sector was higher than that of men in all countries, except the Dominican Republic.

CHART Nº 4 **INFORMAL LABOUR: In 2005, 46.3% of men and 51.4% of women were affected by it.**

South Cone	W	M	Central America and Mexico	W	M
Argentina	43,2	44,1	Costa Rica	36,7	45,1
Brazil	46,6	52,4	El Salvador	50,5	62,1
Chile	27,8	43,7	Honduras	49,2	51,4
Paraguay	56,7	67,0	México	40,9	45,1
Uruguay	42,8	46,9	Nicaragua	54,4	64,3
			Panamá	40,9	45,0
Andean Region			Rep. Dominicana	50,5	46,4
Bolivia	59,1	76,7			
Colombia	57,6	60,4			
Ecuador	53,8	63,8			
Peru	51,1	60,0			
Venezuela	50,0	50,1			

Now, if we analyze the informal sector, we will find that the quality of employment is also worse for women. Why do we say it is worse? Because if we compare only those holding informal jobs, women have the lowest income and the least social security coverage. The latter is related to the high proportion of women employed as domestic workers and as unpaid workers in family enterprises. For women, informality implies a lower income, low salaries and bad employment conditions. For men, the sector showing similar features to domestic work for women – in terms of low employment quality– is the building sector.

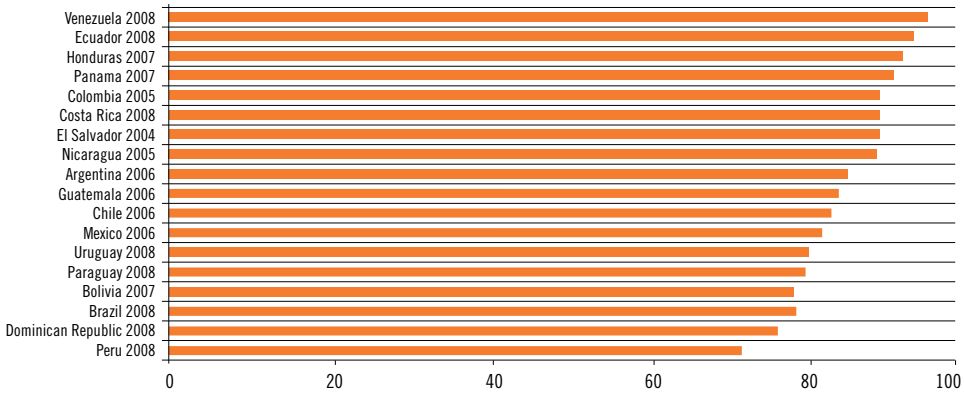
In Colombia, Ecuador, El Salvador, Honduras, Nicaragua, Peru and Venezuela the presence of unpaid women workers in family enterprises and self-employed women – that is, those who have salaries but no employers – in the informal sector is significant (from 37% to 51%). But in Brazil, Paraguay and Uruguay, employment in domestic work is more common (more than 20%).

This also shows a difference in our economies: wherever the labour market is more informal and self-employed workers have a higher presence, women are also more present, as self-employed workers.

Another element that is worth mentioning is that in Latin America there is a significant income gap, that decreased moderately even though in the 90s it stayed above the global average. The income of women working in micro-enterprises, self-employed workers or domestic workers is very low, keeping them at poverty levels. On average, women work fewer hours than men in these jobs, another factor contributing to the existing gender differences in income.

Regarding the income gaps per country, in Bolivia they favoured women, in Guatemala they are non-existent, in Colombia and Mexico they are around 7%, and the highest gaps are observed in Uruguay (26.3%) and Brazil (29.7%).

CHART Nº 5 **URBAN WAGE RATIOS PER BY GENDER**



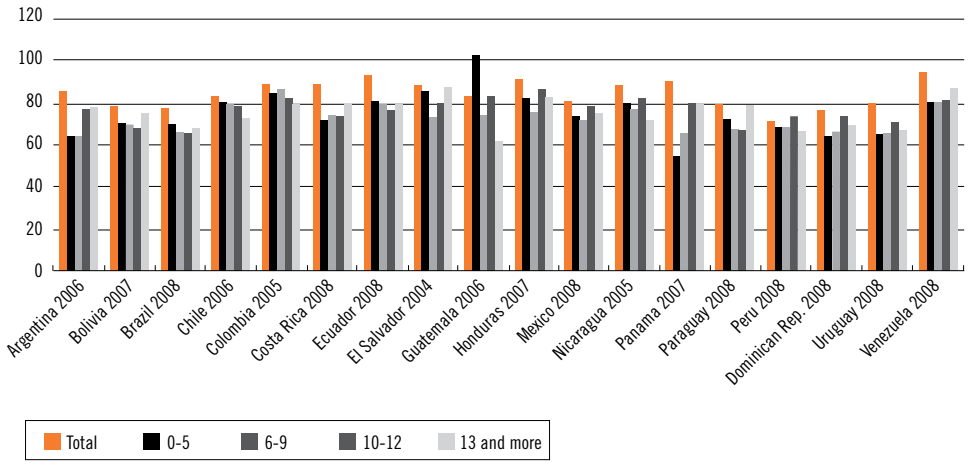
Source: Self-produced on the basis of Statistical Yearbook for Latin America and the Caribbean, 2009

These gaps change if we compare the hourly value of male and female workers, or their monthly value. The more important differences are to be found in the monthly value, that is, on average, women's monthly incomes are much lower than men's. This changes for the hourly value, because the discrimination affecting labour markets is not overt. But there is an indirect discrimination producing labour segregation: most women are employed in lower-paid jobs, or women are mostly selected for jobs paying lower wages. This difference in the type of women and men's occupations causes the salary gaps to be wider when they are compared on the basis of hourly wages.

When analyzing the wage gap across educational levels, a very worrying finding comes across: the higher educational level of men and women corresponds to the wider wage gaps. That is, States and families invest in educating women but when high and very high educational levels are reached – those implying twenty or twenty-two years of schooling – men and women find themselves placed differently in the labour markets. Let me give you an example: a man and a woman study Medicine, both go into post-graduate studies, the man ends up being a cardiac surgeon and the woman a paediatric specialist; but their salaries are extraordinarily different when comparing the average

wages of persons with the same educational level but holding different jobs. Chart No. 6 shows clearly how in countries like Guatemala, Peru, Brazil and Chile the salary gap increases together with the educational levels. For instance, in Guatemala a man with 13 years of schooling or more will earn 100, while a woman in the same position will earn 61.5.

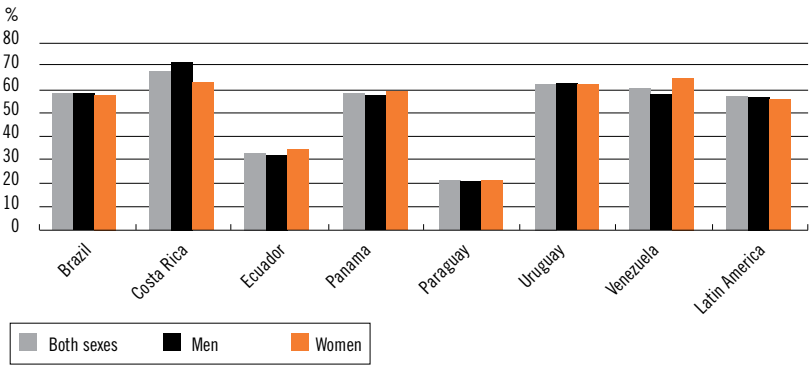
CHART N° 6 **SEX RATIO IN URBAN SALARIES, ACCORDING TO YEARS OF SCHOOLING**



Self-produced on the basis of the Statistical Yearbook for Latin America and the Caribbean 2009

Another relevant problem affecting wage earners, and particularly women wage earners, is lack of social protection. Even though both male and female wage earners have confronted relatively similar conditions, the coverage is still lower for women, except in Ecuador, Uruguay and Venezuela.

CHART Nº 7 **EMPLOYED PERSONS CONTRIBUTING TO SOCIAL SECURITY SYSTEMS PERCENTAGE**



3. REGIONAL DIVERGENCES IN LATIN AMERICA

In Latin America, regional divergences have to do with the countries´ different patterns of international insertion, that is, the composition of their export trade and what is being exported (for instance, oil or manufactured products, beef). According to this pattern, there will be more or less women and men employed, and in different jobs. Another factor that defines the pattern of insertion is linked to the geographical concentration of the destination of the exported goods, and this factor can determine the differential impacts that crisis will have on a country. For instance, the economies of Central American and Caribbean countries that had the USA as almost the only destination for their export goods, suffered a strong impact when the USA faced a crisis in 2008. A third element to be considered is the importance of migration and the subsequent remittances for the economies of our region.

We will now elaborate in more detail three patterns of international insertion in our region.

In the sub-region formed by Mexico and Central America, the pattern is marked by a strong and growing tendency towards exporting manufactured goods, as well as by a high and recent participation of the *maquiladora* industry in the sum of exports. The high degree of concentration in the USA market, as well as the importance of migration and remittances are also distinctive features.

The sub-region of the Andean Community has showed an international pattern in which minerals and oil play an important role in the exports. The USA and Canada are the main destinations for the products exported, international trade is growing, as are remittances and migration.

In the sub-region of MERCOSUR and Chile, agricultural and cattle farming products – including manufactured goods of an agricultural/cattle farming origin – have a very important role in the sum of goods exported. The destinations are more geographically diversified than for the other sub-regions and a rapid growth of inter-regional trade has also been observed.

The results of these three patterns of international insertion are different. Mexico and Central America enter markets that are more dynamic in comparison to those of South America. The goods exported by Northern Latin America are more labour-intensive while those from the South are more natural resource-intensive. Why are the products from the North more labour-intensive? Because both services and manufactured goods are produced in that sub-region.

To conclude my presentation, I would like to raise the debate on the development of the *maquila* and work opportunities for women. Several studies show that *maquilas* are very important employers of female labour, but we know that the working conditions in *maquilas* are very bad. Also, those jobs have become very unstable as a consequence of the crisis. The economic crisis caused the loss of dozens of thousands of *maquila* jobs, due to the closure of business. It is worth mentioning that even before the 2007-2008 crisis, a *demaquilization* process had already started in Mexico. *Maquilas* always look for the lowest possible labour costs, resulting in *downwards* competition, in which countries offer less labour and social guarantees in order to attract investments. There is always another country that can do the job for less, there is always another that can exploit even more ... Then, for instance, the *maquila* industry moves to Asia. Capitals move freely, but female and male workers do not. This creates a very strong and powerful asymmetry for any negotiation.

Then, to what extent do these employment opportunities contribute to gender equity? This is an interesting issue for discussion among women and in the feminist movement. I believe that jobs like those offered by the *maquila* create income and provide a certain basis for economic autonomy. What are the results or effects of this in terms of gender equity and equality? This is an arguable matter and there are different positions, but above all we need to consider the specificities of each context.

4. KEYS FOR ACTION

I would not like to conclude this presentation without raising a point that I believe is essential when we are speaking of gender and employment: the relationship between paid and unpaid work. That is: even with the most pro-equality legislation and with all the efforts to create formal equality, opportunities for men and women are different because they enter the labour markets in different ways and thus obtain different results. This is very important. When we consider gender equality – as the ILO affirms – as equality in opportunities, treatment and results, we need to take into account the two spheres in people's lives and the two spaces in which economy operates: the productive sphere of the market economy and that of social and biological reproduction. In the latter, the workforce is reproduced on a daily basis, along with the generations, norms, values, thinking patterns, behaviours, etc. This second sphere has traditionally been in the hands of women, through both paid and unpaid work. Feminist economy is paying particular attention to what is known as the economy of care, understood as the sphere of goods, services, activities, relationships and values that allow meeting the most basic needs for existence and the reproduction of humanity. Even though a very considerable portion of those services is provided at home, through women's unpaid and invisibilized work, they are also offered in the public sector and the market. From an economic point of view, this work has no value, even though it is the only one that ensures the basis on which economy can operate. In order to go to work the next day, a worker needs to eat, sleep, cleans him/herself, etc.; also, the generations must acquire some social behaviours and values.

Every day, more and more women take paid jobs, but domestic work at home has not yet being redistributed. An adequate provision of public services to alleviate that burden is also still absent.

Conversely, precarious work conditions – instability, informality and the reduction in social security coverage – have caused a deficit of decent work that may be aggravated by the current global economic crisis.

Thus, if we want to improve women and men's labour conditions, as well as their life conditions, it is key to understand that social reproduction is everybody's responsibility and not just women's.

As a consequence, public policies need to maximize conciliatory mechanisms between paid and unpaid work, and also to support the necessary cultural changes that make those mechanisms viable. Among the cultural changes, it is important to conceptualize the value of domestic work and transform the notion of care as the responsibility only of homes and women, to acknowledge that it is an activity that belongs to society as such and whose burden must be distributed among the State, market and the different family configurations. Co-responsibility must be expressed at the micro-level through equitable distribution of labour between men and women at home, but the State must also contribute by creating and regulating care services for dependent persons. The State must also intervene by regulating the private sector and guaranteeing the conditions of labour for service providers.

In terms of public policies proposed, it is key to take into account the creation of jobs in the care sector, adjusting their schedules, encouraging geographical decentralization and expanding the coverage of the services provided.

Policy incentives for women to access paid work, must take into account the unpaid work that must then be taken over by the State, the market and/or the home. But they must also ensure the quality of the jobs that are offered.

In relation to this, Latin American countries must take steps towards ratifying the ILO conventions that can contribute to encourage these conditions of co-responsibility. Specifically, I refer to the ILO Convention 183 on Maternity Protection (2000) and Convention 156 on Workers with Family Responsibilities (1981). Also, those countries that have already ratified them must make efforts towards the effective implementation of this Convention and also those supporting them: Convention 100 on Equal Remuneration (1954) and Convention 111 on Discrimination in Employment and Occupation (1958). Lastly, collective negotiation is considered one of the most important mechanisms and tools to introduce this issue.

2. A REGIONAL HEALTH OVERVIEW: ANALYSIS OF THE CURRENT SITUATION AND TRENDS FROM A GENDER PERSPECTIVE

Claudia Giacometti[1]

In this presentation I will try to introduce some indicators that might be useful for the discussion on the situation of health in the context of globalization. We need to take into account that the heterogeneity within and among countries raises some complexities in conducting an in-depth analysis of this dimension. This is why we will discuss trends without moving into a country diagnosis. There are limited health indicators available at the international level allowing for comparisons among countries. In most cases, they speak of lack of health (mortality) and there is very little that can be explored in depth about health status. Also, when comparing country averages, we need to take into account that, in contexts of inequality, the average values hide deep inequalities within each country.

---

[1] Argentinean. Studied Educational Psychology at Rio Cuarto National University, Cordoba. Independent consultant who has worked for several United Nation agencies (ILO, CEPAL, UNIFEM). Her areas of work are the analysis and processing of data on the labour market, gender, health and education.

She is currently working for the Educational Costs Watchdog Project for the Argentinean Ministry of Education, and also provides technical assistance for drafting law proposals on labour conciliation and gender.

Her latest publications include *Los programas de transferencia de ingresos condicionados: el caso Argentino.*, in colaboration with Laura Golbert. *Una Nueva Agenda Económica y Social para América Latina*. São Paulo. 2008. *Sistemas de protección social y responsabilidades familiares. Articulaciones posibles*, in colaboration with Gherardi, Natalia y Pautassi, Laura y Zibecchi. ILO (2007) forthcoming. *Las metas del Milenio y la igualdad de género, El caso de Uruguay.* Serie Mujer y Desarrollo. CEPAL. Nº 88, 2007; *El caso de Paraguay*. Serie Mujer y Desarrollo. CEPAL. Nº 79, 2006; *El caso de Argentina*. Serie Mujer y Desarrollo. CEPAL. Nº 72, 2005.

Even though it is true that statistical systems show significant weaknesses to advance diagnosis and policy monitoring, a gender approach to statistics require efforts at two levels. First, to optimize the use of current data and, second, to make the gaps in information visible. Like other State institutions, statistical systems are never neutral and their design reflects current priorities and values. In this regard, it is important to broaden the range of indicators that are used in health diagnosis, through advocacy at the national level. Health systems can generate important information for analysis, but national and local strategies are needed in order to systematize the information produced by the different health sectors. Even though due to time constraints we will not discuss this issue in depth, it is worth highlighting that if we want to do advocacy at the local level, we need to learn which indicators are generated (or could be generated) on the basis of the data that is recorded in hospitals and health institutions. We also need to identify the gaps, to demand specific policies that respond to local claims.

In order to begin our analysis, I will touch upon some issues that were addressed in the previous presentation. The right to care and the division of labour in care are dimensions that are present in the three axes that will be examined today: labour market, health and education.

1. SOCIOECONOMIC CONTEXT

In Latin America, important changes have taken place in the last few decades. Structural adjustment and reform implemented in the framework of the Washington Consensus are today reflected in the conditions in which the population lives and in the way institutions are organized. Poverty, inequality, low level of institutionalisation on the part of States are dimensions that, to a lesser or higher degree, are present throughout the region. The weakness of State policies has meant that responsibilities are transferred to homes; in contexts of gender inequality, these policies have had differential impacts on women and men. From a gender perspective, we need to call attention to the need to discuss the division of responsibilities for care. Health policies cannot be ignored in that debate.

At the demographic level, Latin America shows a pattern of increasing numbers of an ageing population. The reduction in growth levels, the drop in fertility and mortality, together with growing urbanization are trends that can be found in all countries.

Historically, the region has shown a sharp urban-rural inequality. Migration from the countryside to cities has improved access to social services. However, we need to

take into account that in the last decade this process was not always accompanied by investments in urban infrastructure. Together with an increase in inequality, this translates today into a strong segmentation of urban spaces. Usually, what is used to compare inequality is the distance between the urban and rural spheres, but taking the current situation into account, we will have to start producing indicators that also show inequalities within cities. The exclusion levels in urban spaces raise new challenges for designing social policies; from a gender perspective, we need to highlight that it is not just a matter of broadening coverage but also of implementing mechanisms to break the cycle of poverty, ensuring the same opportunities for all men and women. Setting up primary health care quality services is a requirement to guarantee the right to health.

Social segmentation and fragmentation create the context in which demographic changes are occurring, in a society that is increasingly ageing. In Table No. 1 we can see how, in different patterns, this trend can be found in all countries.

TABLE 1 **GLOBAL FECUNDITY AND LIFE EXPECTANCY RATES BY REGION. 1950-2050**

		1950-1955	1970-1975	1990-1995	2005-2010	2015-2020	2025-2030	2035-2040	2045-2050
Global fecundity rate (number of children per woman of fertile age)	Global	5,0	4,5	3,1	2,6	2,4	2,2	2,1	2,0
	Africa	6,8	6,7	5,7	4,7	4,0	3,3	2,8	2,5
	Asia	5,9	5,0	3,0	2,3	2,2	2,0	1,9	1,9
	Europe	2,7	2,2	1,6	1,5	1,5	1,6	1,7	1,8
	North America	3,5	2,0	2,0	2,0	1,9	1,8	1,8	1,9
	Pacific	3,9	3,2	2,5	2,3	2,2	2,1	2,0	1,9
	Caribbean	5,3	4,4	2,8	2,4	2,3	2,1	2,0	1,9
	Latin America	**5,9**	**5,1**	**3,0**	**2,4**	**2,1**	**2,0**	**1,9**	**1,9**

→

→

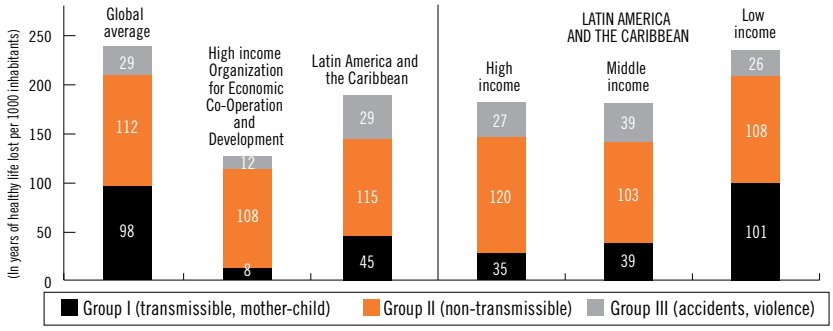
		1950-1955	1970-1975	1990-1995	2005-2010	2015-2020	2025-2030	2035-2040	2045-2050
Life expectancy (in years of life)	Global	46,4	58,3	64,2	67,2	69,8	71,9	73,7	75,4
	Africa	38,5	46,8	51,9	52,8	56,4	59,8	63,0	66,1
	Asia	41,0	56,6	64,5	69,0	71,9	74,1	75,9	77,4
	Europe	65,6	70,9	72,6	74,6	76,4	78,2	79,7	81,0
	North America	68,8	71,6	75,5	78,5	79,7	80,9	82,1	83,3
	Pacific	60,4	65,2	72,3	75,2	77,0	78,4	79,8	81,0
	Caribbean	52,3	63,0	67,6	71,5	73,6	75,4	77,1	78,4
	Latin American	**51,8**	**61,2**	**69,1**	**73,4**	**75,5**	**77,1**	**78,5**	**79,6**

Source: United Nations, *World Population Prospects: The 2006 Revision Population Database* [online database] http://esa.un.org/unpp/ and Latin American and Caribbean Demographic Centre (CELADE). ECLAC's Population Divison, *Population estimates and projections, 2007*

Why was the Latin American demographic transition process remarkable? As we can see, the rate at which life expectancy has increased in the region is considerable, when compared to that of more industrialized regions. This poses a serious challenge to health systems to satisfy the demands of a rapidly ageing population when in most cases they have not yet been able to attend to the demands of a younger population that has no access to health services, due to coverage problems, and to basic social infrastructure services.

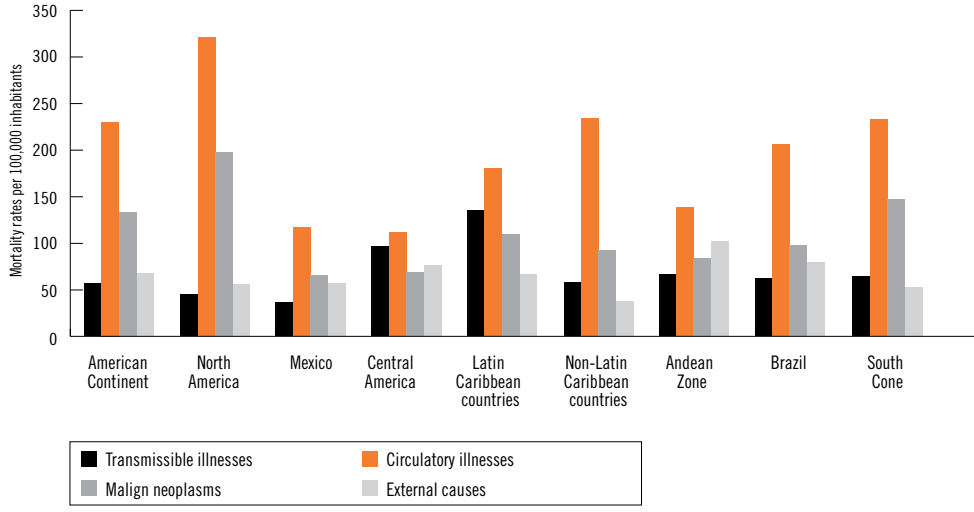
In terms of health needs, the situation in Latin America is very diverse and in some cases worrying. The coexistence of different demographic transition processes within and across countries translates into epidemiological patterns requiring differentiated health policies. The charts that follow show several indicators that reveal the tensions present in the definition of health policies and services before the demographic changes. The difference in illness burden between the European and Latin American populations is remarkable. Transmissible diseases have a strong presence in the region, and they are strongly linked to the different countries' income levels. Primary health care services, access to basic sanitation and to proper nutrition, are all basic requirements to move forward in preventing transmissible diseases. Broadening these services and formulating active policies that move to reduce the current levels of poverty and extreme poverty are basic requirements to guarantee the right to health, and thus this is necessarily the role of the State.

CHART 1 **BURDEN OF DISEASE INDICATORS 2002: LATIN AMERICA AND THE CARIBBEAN VS THE REST OF THE WORLD**
(In years of healthy life lost per 1000 inhabitants)



Source: Data provided by the World Health Organization (WHO)'s morbidity burden team, Geneva

CHART 2 **ESTIMATED MORTALITY RATES PER ILLNESS GROUP IN THE AMERICAN REGION, MAIN SUB-REGIONS AND SELECTED COUNTRIES, 2002-2004**



Source: Pan-American Health Organization. Health Status in the Americas. Basic indicators, 2006

The increase in the ageing population implies that the burden of non-transmissible illnesses will inevitably increase over time, so it is possible to project a growing demand for more costly health services.

In a discussion on globalization, inequalities between countries cannot be ignored. Europe had an ageing pattern that allowed it to slowly generate care and social protection systems. On the other hand, Latin America must design policies that allow for rapid responses to these changes, in a context where poverty and inequalities within and among countries are increasing combined with decades of the State's role weakening.

Life expectancy has increased in all the countries, along with the broadening of basic services, wider vaccination coverage and improvements in health systems overall. However, the current deficits are still very significant. The withdrawal of the State or the weakening of public policies to guarantee the right to access basic sanitation services and quality social services in contexts of poverty create groups of people for whom it is difficult to access the improvements. It is not possible to wait for the "trickling down of growth" in order to move ahead; what is required is for the State to take up its role in guaranteeing the right to health through active policies.

There cannot be a one-size-fits-all answer. Heterogeneity and inequality are two dimensions that are revealed in an analysis of the regional situation. Table 2 shows demographic indicators by country.

TABLE 2 **DEMOGRAPHIC TRANSITION STAGES. FECUNDITY, MORTALITY, LIFE EXPECTANCY AND OVERALL ANNUAL GROWTH RATES**

1980-2005 BY COUNTRY, IN ORDER OF DEMOGRAPHIC TRANSITION STAGE AND LIFE EXPECTANCY IN 2005-2007

Demographic transition based on fecundity and life expectancy			Global fecundity rate children per women		Tasa bruta de mortalidad Per 1,0000		Life expectancy at birth Years of life		Total annual growth rate Per 1,0000	
			1980-85	2005-2010	1980-85	2005-2010	1980-85	2005-2010	1980-85	2005-2010
Latin American			3,9	2,4	7,8	6,0	65,4	73,4	21,1	12,7
Very advanced	C	Cuba	1,8	1,5	6,4	7,5	74,3	78,3	8,1	-0,1
Advanced		**Costa Rica**	**3,5**	**2,1**	**4,7**	**4,2**	**73,8**	**78,8**	**27,8**	**16,6**
		Chile	2,7	1,9	6,4	5,5	70,7	78,5	16,0	9,9
		Uruguay	**2,6**	**2,1**	**9,9**	**9,4**	**71,0**	**76,2**	**6,4**	**2,7**
		Mexico	4,3	2,2	6,3	4,9	67,7	76,1	20,6	11,0
	C	Argentina	3,2	2,3	8,5	7,8	70,2	75,2	15,2	9,7
	C	Colombia	3,7	2,2	6,6	5,6	66,8	72,8	21,4	12,7
	C	Brazil	3,8	2,2	8,3	6,4	63,6	72,4	22,5	12,8
Full		Panama	3,5	2,6	5,7	5,1	70,8	75,6	22,0	16,0
		Ecuador	**4,7**	**2,6**	**8,1**	**5,2**	**64,5**	**75,0**	**26,7**	**14,4**
		Venezuela	4,0	2,5	5,5	5,2	68,8	73,8	27,5	16,3
		Nicaragua	5,9	2,8	10,1	4,7	59,5	72,9	26,3	13,1
		Dominican R.	4,0	2,8	7,4	6,0	64,1	72,2	21,5	14,3
		Honduras	6,0	3,3	9,2	5,1	61,6	72,1	30,6	19,9
		El Salvador	**4,5**	**2,7**	**10,8**	**5,8**	**57,1**	**71,8**	**7,8**	**16,2**
		Paraguay	5,2	3,1	6,9	5,6	67,1	71,8	29,3	17,9
		Peru	4,7	2,5	9,1	6,2	61,6	71,4	23,9	11,5
Moderate		Guatemala	6,1	4,2	10,8	5,7	58,3	70,2	24,7	24,6
		Bolivia	5,3	3,5	13,3	7,6	53,9	65,5	21,5	20,1
	C	Haiti	6,2	3,5	15,6	9,4	51,5	60,6	23,1	16,4

The letter C identifies those countries that were included in the different categories in a conditional way. In order to be able to define if they can continue being part of that category or if they must be moved to a previous stage of the process, the evolution of mortality rates must be assessed.
Source: CELADE. Demographic estimates and projections for Latin America and Caribbean populations, updated to July 2007. CELADE 2007 and 2008

The current gaps between lowest and highest values are significant, and here there is a need to take into account that there are also inequalities within countries. To call attention to regional heterogeneity, it is useful to examine life expectancy: while in some countries it rises above 78 years of age, in others it barely reaches 60. The higher life expectancy for women is a constant across all countries. Health systems need to respond to the new demands for care. The exercise of the right to health requires that health care is strengthened throughout the life cycle.

TABLE 3 **LIFE EXPECTANCY. 1950-2050 BY SEX**

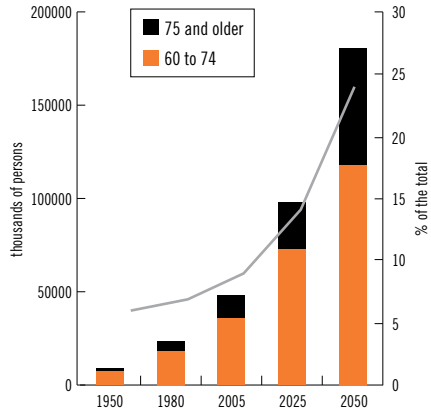
	1950		1985		2005		2050	
	Men	Women	Men	Women	Men	Women	Men	Women
Latin America	50	54	62	69	69	75	77	83
Argentina	60	65	67	74	71	78	77	85
Bolivia	39	43	52	56	62	66	74	79
Brazil	49	53	60	67	67	75	76	83
Chile	53	57	67	74	75	81	79	85
Colombia	49	52	64	70	68	75	76	82
Costa Rica	56	59	72	76	76	81	80	85
Cuba	58	61	73	76	75	79	81	85
Ecuador	47	50	63	67	71	77	77	83
El Salvador	44	47	51	64	68	74	76	82
Guatemala	42	42	56	61	66	73	75	82
Haiti	36	39	50	53	56	60	72	77
Honduras	41	43	59	64	69	73	76	81
Mexico	49	53	64	71	72	77	79	84
Nicaragua	41	44	57	63	68	74	75	82
Panama	54	56	68	73	72	77	78	84
Paraguay	61	65	65	69	69	73	75	80
Peru	43	45	60	64	68	73	76	81
Dominican Rep.	45	47	62	66	68	74	75	81
Uruguay	63	69	68	75	72	79	79	85
Venezuela	54	57	66	72	70	76	77	83
Lowest	36	39	50	53	56	60	72	77
Highest	63	69	73	76	76	81	81	85

Source: CELADE. Demographic estimates and projections for Latin America and Caribbean populations, updated to July 2007. CELADE 2007 and 2008

CHART 3 **LATIN AMERICA. POPULATION ESTIMATES 2005 - 2050**

POPULATION PYRAMIDS BY SEX. 2005-2050.

NUMBER AND PERCENTAGE OF PERSONS 60 YEARS AND OLDER



Source: CELADE. Demographic estimates and projections for Latin America and Caribbean populations, updated to July 2007

A population that is increasingly ageing, in a context of poverty and absence of – or weakness in – public policies, will raise even more challenges in the future. If we add to this the changes in the configuration of families and the rise in female activity rates in the labour market, it becomes clear that all these will have gender impacts. Until now, the weakening of public policies has had an impact on gender inequalities, as the deterioration in social policies and the sexual division of labour resulted in care responsibilities being transferred to the domestic sphere.

In the previous presentation we discussed the situation of labour. The growth of the informal sector and of labour are dimensions to be taken into account when examining the health situation. Particularly in this field, what is important for our analysis is to understand these dimensions in the context of globalization. An ageing population lacking a proper response from the social protection system will place demands on the health system. Social security coverage and the income levels of those accessing it are serious challenges that Latin American societies must face.

Gender inequality in pension coverage is an indicator that summarizes the multiple forms in which the current disparity in opportunities is translated into men's and women's lives. Table 4 shows a few indicators making this inequality visible and also calling attention to the low coverage in some countries. In Ecuador, Venezuela, Nicaragua and Paraguay, the coverage for the 65-69 years group is lower than 10%, that is, 9 out of 10 women lack a pension of their own. Even though this presentation deals with the situation in the field of health, we cannot leave the issue of social protection systems out of the discussion. How far does globalization currently allow for advancement in this regard? The trend of the most recent years, with the increase of the informal sector, is a warning signal. The mobility of capital, in search of cheap labour, is another aspect to be taken into account when discussing globalization and its impact on the conditions of life in the region.

TABLE 4

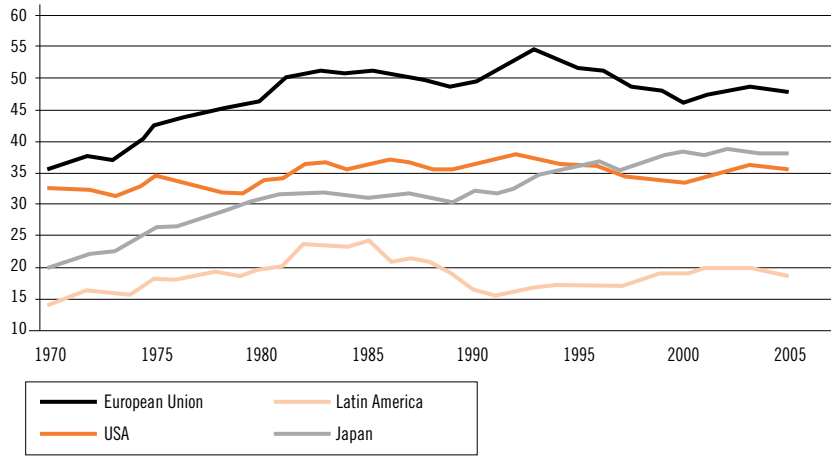
PENSIONS AND RETIREMENT FUNDS, URBAN AREAS, 2005 *(IN PERCENTAGES)*

Demographic Transition Stage	Countries	Percentage of older persons					
		65- 69 Years old			70 Years and older		
		Total	Men	Women	Total	Men	Women
Advanced	Uruguay	73,1	74,2	72,3	92,0	95,4	89,9
	Chile	64,4	72,7	57,6	81,9	89,1	77,2
	Argentina	47,8	49,9	46,2	77,3	83,0	73,9
	Brazil	79,3	84,6	75,1	88,7	93,6	85,6
	Colombia	25,6	34,9	18,3	24,1	32,5	18,1
	Costa Rica	39,0	38,0	40,0	44,0	57,0	33,0
	Mexico	31,5	44,7	19,8	31,8	45,1	21,0
Full	Panama	57,5	68,7	46,4	56,2	66,2	48,6
	Ecuador	17,4	20,1	15,1	29,7	35,1	25,1
	Venezuela	12,0	21,0	3,0	13,0	26,0	3,0
	Dominican Rep.	16,8	24,2	11,2	14,9	21,8	9,1
	El Salvador	25,1	36,8	15,9	21,7	32,7	14,1
	Paraguay	29,9	24,1	33,8	26,2	28,5	24,9
	Nicaragua	14,0	22,0	9,0	22,0	36,0	12,0
	Honduras	17,1	12,3	20,9	17,2	20,9	14,3
Moderate	Bolivia	19,4	32,5	8,6	19,9	34,7	8,9
	Guatemala	17,2	23,6	12,3	18,8	29,1	9,6

Source: Economic Commission for Latin America and the Caribbean (ECLAC) based on special tabulations from the household surveys of the respective countries

At the same time that women are joining the workforce, health care institutions are becoming weaker. This results in an increase in women's overall work burden and in a take over of their time. With regard to the health-related challenges, it is interesting to introduce the issue of public expenditures in the debate on globalization and health. In Chart 4, the evolution of the total public expenditures is compared by continent (Bertranou, 2008). As it is expressed in GNP percentages, it is also interesting to examine the evolution of this indicator as well. Both illustrate the current levels of inequality. In Latin America, a lower percentage of the GNP is devoted to public expenditures, as compared with Europe and the USA. The gap is even wider if the *per capita* expenditures are considered. In Europe, public expenditures constitute 46% of the GNP, while in Latin America it does not go beyond 20%. The *per capita* GNP of Europe is above US $ 21,000, more than triple that of Latin America.

CHART 4 **INTERNATIONAL COMPARISON: EVOLUTION OF PUBLIC EXPENDITURE 1970-2005**
(In GNP percentages)



Source: Bertranou (2008)

TABLE 5 **GNP PER INHABITANT, IN US$, PPP (PURCHASING POWER PARITY) 1990**

	1820	1870	1913	1950	1973	1980	1990	2006
Western Europe	1204	1960	3457	4578	11417	13197	15965	21098
Australia, Canada								
USA and New Zealand	1202	2419	5233	9268	16179	17935	22345	30143
Japan	669	737	1387	1921	11434	13428	18789	22853
Asia (except Japan)	577	548	658	635	1225	1511	2109	4606
Latin America	**692**	**676**	**1494**	**2503**	**4513**	**5183**	**5072**	**6495**
Eastern Europe and former Soviet	686	941	1558	2602	5731	6231	6460	7000
Africa	420	500	637	890	1410	1538	1449	1697
Global	667	873	1526	2111	4091	4521	5155	7282

Source: ECLAC

Globalization creates interdependence and unbalances, while also sharpening competition and inequalities among nations. The increase in regional and national disparities has marked the global economy for the last two centuries. In terms of the gross product per inhabitant, the ratio between the more and less developed regions in the world jumped from around 3 at the beginning of the 20th century to almost 20 when the 21st century began. The question that needs to be asked is if it is possible to think of homogenization with these levels of difference. Heterogeneity and inequality cannot be left aside in the debate around competitiveness. If we ignore them assuming that growth will automatically reduce them, we will be disproved by recent history that shows the opposite is true: growth increases them. When discussing the situation of health, and in a broader discussion on social policies, the need to (re)distribute wealth must be integrated – but this is an aspect that tends to be absent from the globalization agenda.

Disparities in health expenditure among countries are significant, as is the role of the State in funding health systems. In the USA the *per capita* expenditure is of US$ 5,700 while the average amount for Latin America is US$ 222. This difference in investment needs to be taken into account when comparing health indicators. To what extent can we expect similar results when financial efforts are so disparate? Particularly, if we take into account some regional features, such as the high degree of dispersion, the informality of the market and the social infrastructure deficits.

TABLE 6 **NATIONAL HEALTH EXPENDITURES IN THE AMERICAN CONTINENT AND IN OTHER REGIONS, 2004**

Regions	Capital income in U$$ PPP 2000	National health expenditure in GNP percentage	National health expenditure per capita, in US$	National health expenditure per capita, in US$, PPP 2000	Public/ Private expenditure ratio	Public health expenditure in GNP percentages
American continent	**18 149**	**12,7**	**2 166**	**2 310**	**47/53**	**6,0**
Canada	28 732	10,3	2 669	2 875	71/29	7,3
USA	36 465	13,1	5 711	4 791	45/55	7,2
Latin America and the Caribbean	7 419	6,8	222	501	48/52	3,3
High Income Countries[a/]	**28 683**	**11,2**	**3 449**	**3 226**	**60/40**	**6,7**
European Union	25 953	9,6	2 552	2 488	74/26	7,1
Other countries	24 490	8,2	1 997	1 997	64/36	5,2
Low and Middle Income countries[b/]	**4 474**	**5,5**	**79**	**248**	**48/52**	**2,6**
Eastern Europe and Central Asia	7 896	6,5	194	514	68/32	4,5
Middle East and North Africa	5 453	5,6	92	308	48/52	2,7
South Asia	2 679	4,4	24	119	26/74	1,1
East Asia and the Pacific	4 920	5,0	64	247	38/62	1,9
Sub-Saharan Africa	1 820	6,1	36	111	40/60	2,4
All regions and countries	**8 284**	**8,7**	**588**	**742**	**58/42**	**5,1**

[a/] including Canada and the USA
[b/] including Latin America and the Caribbean
Source: produced by the Policy and Health Systems Development Unit, Health System Strengthening Area, Pan-American Health Organization, with data from the World Bank's World Development Indicators and the PAHO's database on National Health Expenditure

Table 7 introduces a series of indicators that call attention to the heterogeneity levels within the region.

TABLE 7 **SOCIOECONOMIC INDICATORS – LATIN AMERICA**

Demographic transition stage	Aging index	Country	Demographic			Social Expenditure			GNP per capita 2004/5	% of population living in poverty	Inequalities in income		Employment		Women 60 years and older w/o own income		Maternal mortality rates
			Life expectancy at birth 2005	Ageing index 2005	% urban population 2005	% of GNP 2004/5	% of total public expenditures 2004/5	Per capita in US$ 2004/5			% poorest 40%	Gap between extreme percentiles	% of those employed from poor households	% female informality	Urban	Rural	
MO	I	Honduras	72	15	48	11,6	52,8	120	386	59,4	10,6	28,2	49,8	41,7	28,5	41,6	280
P	I	Nicaragua	73	15	57	10,8	47,9	90	863	63,8	12,2	27,2	54,0	65,5	40,8	59,9	170
MO	I	Bolivia	66	17	64	18,6	63,0	190	1059	53,8	9,5	44,2	45,4	78,7	35,4	48,6	290
P	I	Paraguay	72	19	59	7,9	40,2	108	1396	55,0	15,0	18,2	36,9	62,6	32,2	42,9	150
P	**Mo**	**Ecuador**	**75**	**25**	**63**	**6,3**	**28,5**	**96**	**1591**	**39,9**	**14,5**	**18,6**	**30,6**	**63,4**	**40,6**	**41,8**	**110**
MO	I	Guatemala	70	14	50	36,3	53,8	100	1611	45,3	14,2	18,7	34,3	65,7	43,1	52,5	290
P	**MO**	**El Salvador**	**72**	**22**	**58**	**5,6**	**31,2**	**120**	**2181**	**41,2**	**15,9**	**16,3**	**31,3**	**62,5**	**47,7**	**60,8**	**170**
A	MO	Colombia	73	25	49	13,4	…	291	2319	45,4	12,2	27,8	35,2	…	49,3	59,4	120
P	MO	Peru	71	25	73	8,9	50,8	208	2563	31,2	14,9	16,3	38,0	72,5	32,3	37,1	240
P	MO	Dominican Rep	72	24	65	7,1	34,5	204	3239	41,8	9,9	29,1	28,1	47,2	36,7	44,7	77
A	MO	Brazil	72	31	83	22,0	72,0	860	4021	29,9	12,2	27,2	20,5	47,8	15,7	7,4	110
P	MO	Venezuela	74	24	93	11,7	41,0	562	4384	30,2			18,1	49,3	47,3	…	57
P	MO	Panama	76	29	66	17,2	40,0	724	4713	21,7	13,2	22,8	12,4	42,9	23,6	36	83
A	MO	Costa rica	79	29	63	17,5	35,8	772	4780	18,0	14,6	16,1	9,5	44,4	32,7	42,2	30
A	A	Uruguay	76	74	92	17,7	57,4	1087	5430	18,8	17,4	12,3	12,7	48	12,5	…	20
A	MOA	Chile	78	46	87	13,1	66,9	729	5873	13,9	14,6	15,7	7,4	38,2	26	23,8	16
A	MOA	Mexico	76	27	77	10,2	58,6	618	6323	26,8	16,9	14,8	19,9	50,8	42,9	43,8	60
A	MOA	Argentina	75	52	92	19,4	64,1	1521	8733	21,0	16,9	14,9	10,6	42,9	28	…	77
		Minimum	66	14	48	6	28	90	386	14	9	12	7	38	13	7	16
		Maximum	79	74	93	22	72	1521	8733	64	17	44	54	79	49	61	290
		Ratio	1,2	5,3	1,9	3,9	2,5	16,9	22,6	4,6	1,8	3,6	7,3	2,1	3,9	8,2	18,1

Source: ECLAC (2008) and CELADE (2008)

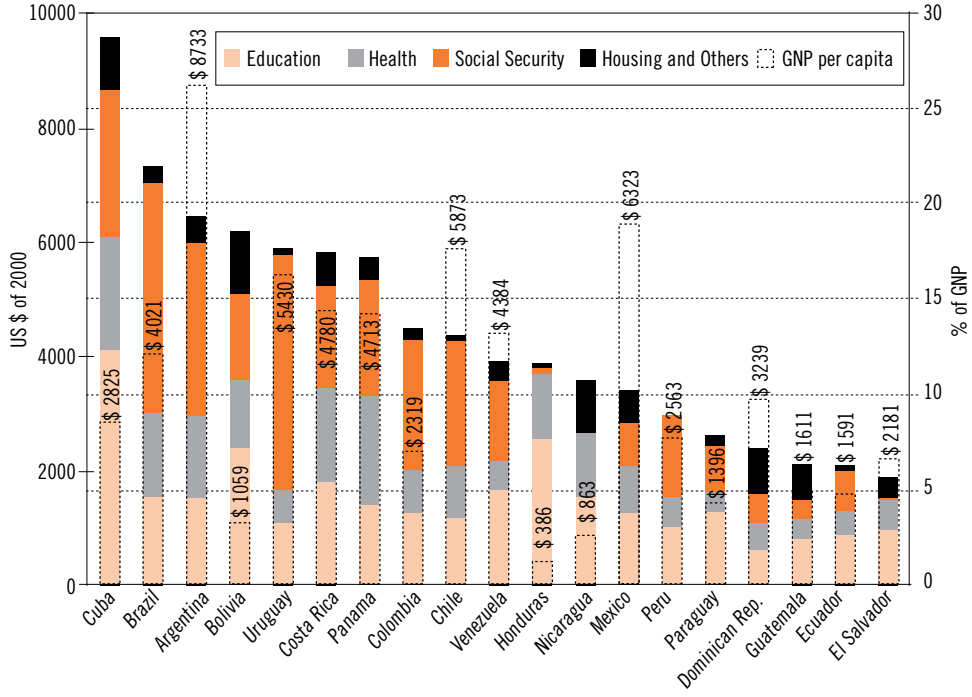
As we can see, many of the indicators presented are not health-specific. But there is a need to integrate them in discussions on health policies. We can see that the region exhibits a very complex landscape in terms of equity. Those countries with the highest poverty levels are those that will face the greatest challenges to ensure life conditions where the right to health is guaranteed.

The level of urbanization is a dimension that must be taken into account when designing health policies. Some countries have 48% of their population living in rural areas, while for others it is only 7%. Countries with low levels of *per capita* income must face the challenge of creating costly health networks in rural areas. Even though the chart does not specifically show it, urban spatial segmentation also needs to be taken into account. The challenges that need to be faced in the region demand autochthonous responses that consider local needs, but they must be part of a discussion that also includes the commitment to make the necessary investments to create health systems guaranteeing equal opportunities to stay healthy and equal access to quality health service, for prevention and treatment of illnesses.

We have already addressed the differences in social expenditure among countries in the region and those of Europe and North America. Now we need to look within Latin America. The *per capita* expenditure varies from a minimum of US$ 90 to a maximum of US$ 1,521. GNP, the indicator showing a country's wealth, covers a range from US$ 386 to US$ 8,700.

Heterogeneity is not limited to levels of social public expenditure but is also present in the composition of that expenditure. In terms of the GNP percentages, we can see that there are differences: while Cuba devotes a good portion of its wealth to social public expenditure, Ecuador, El Salvador and Paraguay devote less. But they do not only spend less but also spend in different ways. Those differences respond to demographic patterns and indexes. Uruguay, Brazil and Argentina devote a larger amount of their resources to social security because they have more ageing populations, while other countries devote fewer resources to social security and more to education because they have a younger population.

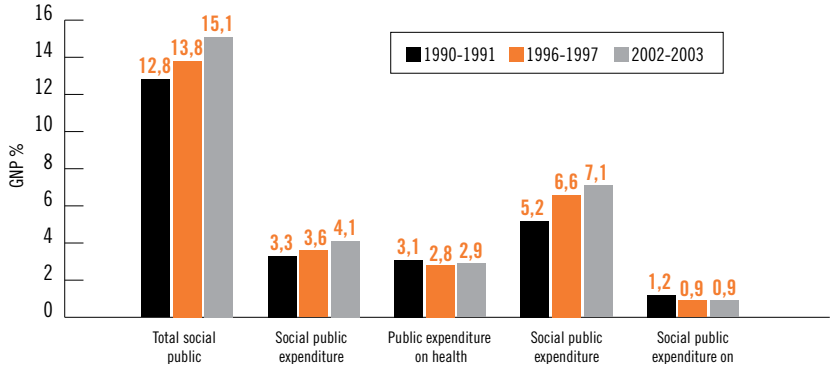
CHART 5 **SOCIAL PUBLIC EXPENDITURE AS GNP PERCENTAGE (2004/05) AND GNP PER CÁPITA IN US$ - PPP 2000 (2006).**



Source: ECLAC (2007)

Demographic changes in the region will also entail modifications in social protection systems. Unlike in Europe, in this region these changes have occurred at a fast pace. It would be possible to speak of a "demographic bonus" for the region – due to the drop in fecundity rates, particularly in the poorest countries – because the dependency rate is still low as compared to that observed in Europe, as there would be potentially more economically active than dependent persons. This situation could allow for resource accumulation, as in theory there are more persons of a legal working age than there are dependents. However, if we frame those opportunities for accumulation in a context of unequal competition and dismantling of State structures, that assumed potential is jeopardized.

CHART 6 **EVOLUTION OF PUBLIC SOCIAL EXPENDITURE – TOTAL AND PER SECTOR – IN GNP PERCENTAGES IN LATIN AMERICA AND THE CARIBBEAN**

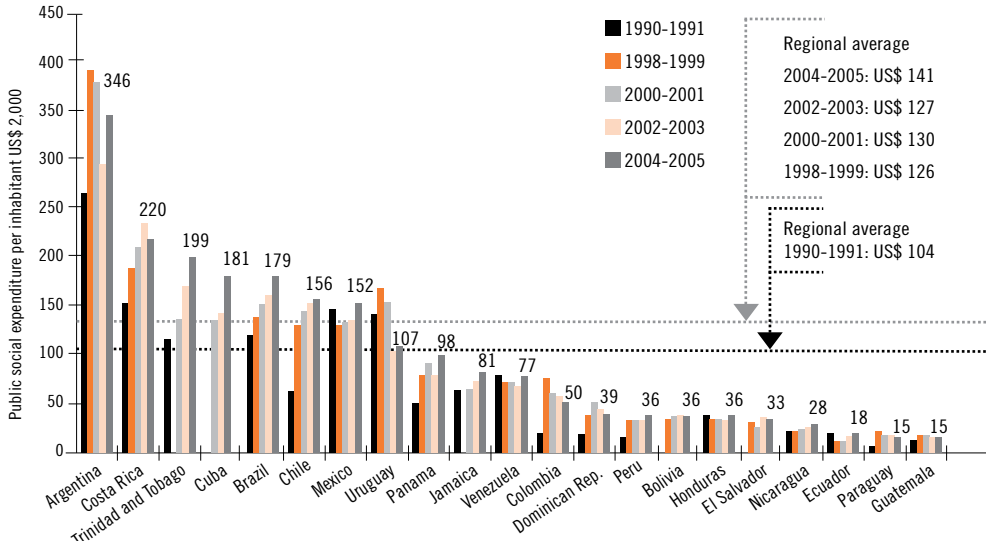


Public expenditure has practically not changed in recent years and constitutes 3% of the GNP (PAHO, 2005). There is a need to pay attention to the decrease of the expenditure from 1.2 to 0.9 – that is almost non-existent – on housing and other sectors. This element of the expenditure is central to ensure health conditions, and has a significant incidence in gender inequalities. The current sexual division of labour assigns the biggest responsibility burden in terms of domestic work to women. Thus, any decrease in investment in basic social infrastructure for sanitation implies a bigger burden for women in terms of work, while also restricting the possibilities to enjoy the right to health. It is key to work to make visible the differential access to services that the State has the obligation to guarantee in order to protect the right to health. However, the struggle among vested interests makes those with a stronger voice influence the distribution of public resources, resulting in increasing inequality.

During recent decades in Latin America we have witnessed a process of "redefinition" of the role of the State. The quote marks are to indicate the fact that it was not actually a redefinition but a dismantling and weakening of public institutions, that was marked in terms of social policies and particularly in the area of health. The deterioration of the public health network and the expansion of private insurance, in contexts where poverty, unemployment and informal employment are also increasing, imply strong restrictions of the enjoyment of the right to health. What happened? In many cases, the middle classes that had social coverage, moved to the public sector because their coverage

decreased and this implied higher levels of exclusion for lower-income persons. In the region, poverty increased not only at the level of household income but also in terms of the type of services – its quality and quantity – to which people have access.

CHART 7 **LATIN AMERICA AND THE CARIBBEAN (21 COUNTRIES): PER CAPITA PUBLIC EXPENDITURE IN HEALTH 1990-1991 TO 2004-2005**
(In US$ PPP 2000)

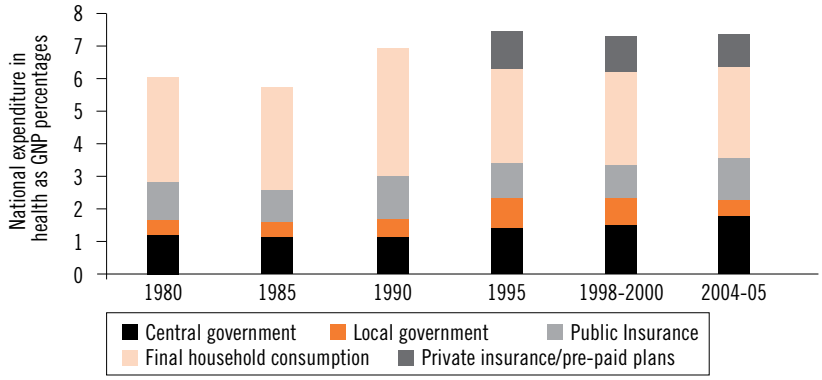


Source: Economic Commission for Latin America and the Caribbean (ECLAC) base on the Commission's own database on social expenditure

Table 8 illustrates the regional situation: we share agendas in Latin America, but there is a need to think – for each space – about the possible responses. Another element that needs to be taken into account in the debate is the processes of transferring services from the national to state/provincial governments.

As we can see in Chart 8, private expenditure in health has increased in recent decades. An estimation of the private expenditure in health shows that the poorest households are those that need to devote a larger proportion of their income to cover health costs.

CHART 8 **CHANGES IN THE COMPOSITION OF NATIONAL PUBLIC EXPENDITURE IN HEALTH OVER TIME, LATIN AMERICA AND THE CARIBBEAN, 1998-2005**



Source: Pan-American Health Organization, Health System Strengthening Area, database on national health expenditure

TABLE 8 **DISTRIBUTION OF HOUSEHOLD EXPENDITURES ON HEALTH BY INCOME/EXPENDITURE, SELECTED COUNTRIES IN THE AMERICAN CONTINENT**

Country	Year	Total	Approximated income or expenditure per percentil				
			First	Second	Third	Fourth	Fifth
Argentina	1996- 1997	8,6	9,2	8,6	7,8	8,2	9,0
Brazil	1998- 1996	6,5	8,3	6,5	6,9	7,1	6,3
Guatemala	1998- 1999	7,3	3,9	5,9	7,0	8,3	7,8
Jamaica	1998	2,6	2,4	2,5	2,5	2,6	2,7
Mexico	1996	2,9	3,7	3,3	3,3	2,9	2,8
Paraguay	1996	10,7	14,0	13,8	10,9	10,1	8,8
Peru	1997	4,4	4,3	4,8	4,7	4,0	4,5
Dominican Republic	1996	6,3	29,1	14,7	9,4	7,7	3,5
Uruguay	1994- 1995	13,0	11,0	14,0	15,0	13,0	11,0

Source: Pan-American Health Organization, Strengthening of Health Systems, Policy and Health Systems Development Unit, August 2006

If we see a trend in the increase in household participation in health funding, we need to read that participation in a context in which poverty is also growing, that is, while the State is withdrawing, women have to increasingly participate in the labour market and the number of poor households is increasing. It is remarkable that the "achievement" in terms of these later years' growth has led us to the same poverty levels as in the 80s, known as the "lost decade". Twenty-five years later, we are about to arrive at the same point of departure as in the lost decade.

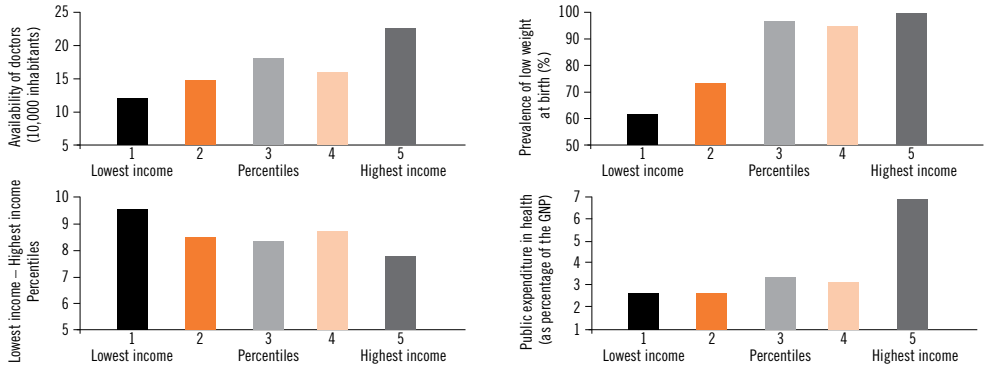
The regional situation is complex and highly heterogeneous. In the countries with the highest levels of poverty, there are also high levels of lack of formal mechanisms. To what extent are these countries able to satisfy the need for resources for extending and improving their health systems only by increasing taxes? Globalization implies competition. The question arising from an assessment of the indicators is: to what extent are the poorest countries able to create conditions that will enable them to compete in the current context of inequality? This does not mean to doubt the need for tax reforms that allow for a better distribution of wealth within countries; on the contrary, what we want to point out is the need for a global discussion on the distribution of wealth.

The high level of lack of formal mechanisms in employment and the high proportion of employed persons living in poverty must be integrated into a discussion on health policies. If access to coverage is dependent only on the labour market while State policies are weakened, inequality increases.

The charts that follow illustrate that inequality, as they allow the comparison of indicators taking into account the GNP of each country. Doctors per inhabitants, prevalence of low weight at birth, and birth assisted by qualified personnel are indicators showing great variation according to the income level of the countries. In the next sections we will analyze some of the indicators used in the health sector, trying to highlight the need to reduce inequalities as a condition to guarantee the right to health for all men and women.

As we have seen until now, there are marked inequalities among countries, but they are also present within countries. Once again, the distribution of wealth plays a central role in the debate.

CHART 9 **INEQUALITIES IN HEALTH SERVICES AND RESOURCES, AND IN ACCESS TO THEM, PER INCOME PERCENTILES IN THE AMERICAN CONTINENT, AROUND 2005.**



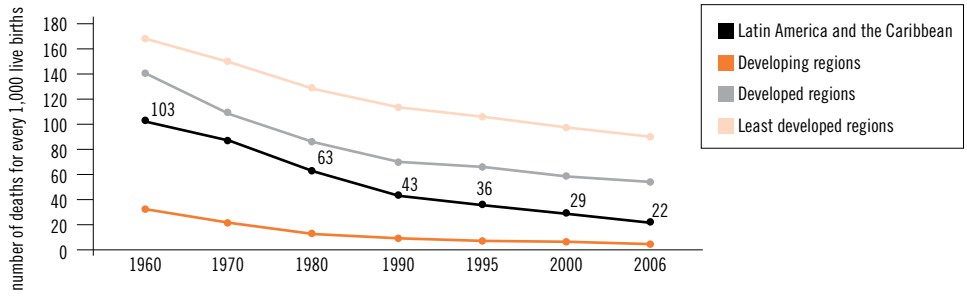
Source: Pan-American Health Organization. Health Situation in the Americas. Basic Indicators 2006

2. HEALTH INDICATORS

2.1 Mortality rates

As we have mentioned earlier, a decrease in mortality can be observed throughout the region. Mortality for children in general, as well as under-five mortality rates, shows a decreasing trend.

CHART 10 **CHILD MORTALITY RATE EVOLUTION**
LATIN AMERICA AND THE CARIBBEAN (33 COUNTRIES) IN RELATION TO THE REST OF THE WORLD (1960-2006) (NUMBER OF DEATHS FOR EVERY 1,000 LIVE BIRTHS)



Sources: ECLAC based on UNICEF, United Nations Fund for Children. Online database: Monitoring the Situation of Children and Women, www.childinfo.org. Data consulted in August 2008

Even though changes can be verified in all countries across the region, we need to call attention to the breadth of the existing gaps that have not been reduced in recent years. The right to life appears distinctly different across countries: while in Cuba mortality rates are around 5 per 1,000 live births, in other countries of the region they are set above 40 per 1,000.

TABLE 9 **CHILD AND UNDER-5 MORTALITY RATES**
(PER 10,000 LIVE BIRTHS)

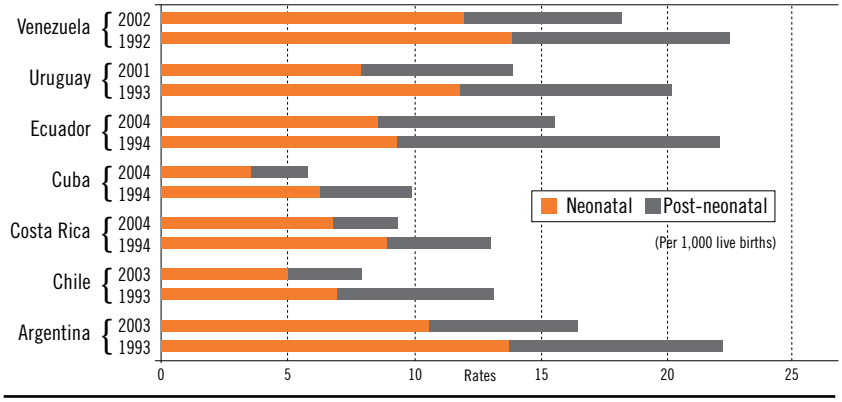
	Child			5 years			Child mortality rate ratio 2007-1990
	1990	2000	2007	1990	2000	2007	
Argentina	24	17	14	28	20	16	0,58
Bolivia	89	63	48	125	84	57	0,54
Brazil	49	28	20	58	32	22	0,41
Chile	18	10	8	21	11	9	0,44
Colombia	28	21	17	35	26	20	0,61
Costa Rica	16	12	10	18	14	11	0,63
Cuba	11	6	5	13	8	6	0,45
Dominican Republic	53	34	31	66	37	38	0,58
Ecuador	43	27	20	57	32	22	0,47
El Salvador	47	29	21	60	35	24	0,45
Guatemala	60	39	29	82	53	39	0,48
Haiti	105	78	57	152	109	76	0,54
Honduras	45	32	20	58	39	24	0,44
Mexico	38	24	18	46	29	21	0,47
Nicaragua	52	34	28	68	43	35	0,54
Panama	26	20	18	34	25	23	0,69
Paraguay	34	28	24	41	33	29	0,71
Peru	58	33	17	78	40	20	0,29
Uruguay	22	14	12	25	16	14	0,55
Venezuela	27	20	17	32	24	19	0,63
Extreme values' gap	10	13	11	12	14	13	

Source: PAHO (2007)

From a gender perspective, it is worth mentioning that there have been more advances in reducing postneonatal (28 days-11 months) than peri (22 weeks of pregnancy-7 days)

and neonatal (birth-28 days) mortality. Post-neonatal mortality is related more to access to basic services and primary health care. In early mortality reduction policies, measures for proper care during pregnancy and at birth play a central role.

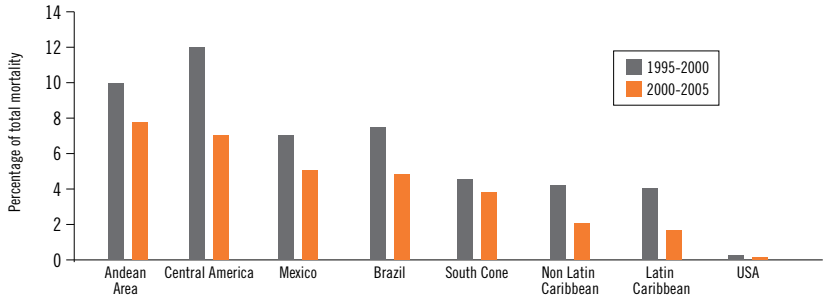
CHART 11 **NEONATAL AND POSTNEONATAL MORTALITY RATES (SELECTED COUNTRIES AND YEARS)** PER 1,000 LIVE BIRTHS



Source: Based on life statistics from the World Health Organization (WHO) and ECLAC (MDG indicators)

As we can observe in Chart 12, there have been advances in reducing mortality caused by diarrheal diseases. However, disparities between countries are still high. In this type of pathology, the conditions of living are key factors. Lack of access to social services qualifies the enjoyment of the right to life.

CHART 12 **MORTALITY IN CHILDREN UNDER 5 YEARS OF AGE DUE TO ACUTE DIARRHEA DISEASES BY SUB-REGION. REGION OF THE AMERICAS. 1995 - 2005**



Source: Pan-American Health Organization. Sustainable Development and Environmental Health Unit

The next table (10) presents an exercise to estimate the cost of investment in health services compared to the costs imposed by the current deficits on the health sector. Access to health services is a right, and thus the responsibility to guarantee it falls on the State. As we can see, investment in service provision is efficient, because it reduces the costs in the field of health.

TABLE 10 **COST/BENEFIT OF SCENARIOS FOR INTERVENTION IN WATER AND SANITATION IN LATIN AMERICA AND THE CARIBBEAN**

Scenarios (Access and service levels for 2005)	Annual Cost[a]	Annual Benefits[a]	Cost/benefit ratio
1. To reduce the deficit in access to water by 50%	171	2 199	12,8
2. To reduce the deficit in access to water and sanitation by 50% (according to Goal 10 of the MDGs with JPM – Joint Programme for Monitoring indicators)	788	9 635	12,2
3. To reduce the deficit in water and sanitation by 100%	1 577	22 532	14,3
4. Universal access to water and sanitation (scenario 3) plus water disinfected at the point of use.	1 937	38 129	19,7
5. Universal access to regulated water and sanitation system. Water and residual waters treated.	14 085	69 223	4,9

[a] In USA millions, year 2000
Source: Hutton G, Heller Evaluation of costs and water and sanitation improvements at global level. Geneva: WHO; 2004

We have examined the drop in child mortality and the inequalities among countries. The following Table (11) shows the inequalities within each country, integrating the ethnic and place of residence dimensions, differentiating between the urban and rural areas. As we can observe, disparities are significant and here we need to highlight that most of the mortality is reducible. When we speak of reducibility, we are referring to public investment in service provision but also in training, allocated resources, etc.

TABLE 11 **LATIN AMERICA (13 COUNTRIES): MORTALITY RATES, BY 1,000 LIVE BIRTH, BY ETHNIC STATUS AND AREA OF RESIDENCE**
(CENSUS STARTING IN 1990)

Country	Census year	Total per Country			Area of residence					
					Urban			Rural		
		Indigenous	Afro	Others	Indigenous	Afro	Others	Indigenous	Afro	Others
	1992	104,0	...	55,9	82,7	...	52,9	121,0	...	93,8
Bolivia	2001	77,7	...	50,5	67,8	...	48,1	87,8	...	57,1
	1990	61,1	53,9	39,4	75,7	59,7	35,1	56,7	73,1	50,5
Brazil	2000	39,7	40,2	26,7	37,2	37,5	24,7	41,8	48,1	35,0
Chile	2002	12,8	...	11,5	12,0	...	11,4	12,7	...	12,0
Colombia	2005	39,5	31,7	23,9	30,9	30,0	23,5	39,8	33,8	25,0
Costa Rica	2000	20,9	11,2	11,5	20,4	8,2	10,7	21,5	15,1	12,3
	1990	101,8	...	53,3	51,5	...	39,6	108,0	...	69,4
Ecuador	2001	72,2	...	30,5	42,9	...	24,7	76,6	...	39,1
	1994	61,1	...	49,7	55,9	...	41,0	62,1	...	55,2
Guatemala	2002	51,1	...	41	47,2	...	35,3	52,6	...	45,7
Honduras	2001	43,5	31,9	34,5	27,1	30,1	25,1	45,2	33,7	41,8
	1990	53,8	...	36,7	48,7	...	31,1	70,8	...	49,8
Mexico	2000	42,7	...	26,2	35,4	...	23,7	47,1	...	33,3
Nicaragua	2005	34,0	38,0	25,4	24,4	24,1	18,8	39,1	47,4	33,9
	1990	72,2	...	21,6	39,9	...	17,7	75,3	...	26,0
Panama	2000	53,5	...	17,3	31,7	...	15,7	57,5	...	19,5
	1992	95,2	...	45,8	90,8	...	45,9	95,5	...	45,8
Paraguay	2002	78,5	...	37,7	72,1	...	38,8	79,1	...	36,3
Venezuela (Bol.Rep. of)	2001	44,4	...	19,5	31,9	...	19,1	58,1	...	22,6

Source: Centro Latinoamericano y Caribeño de Demografía (CELADE)- ECLAC Population Division, special processing of censal microdata

With regard to neonatal mortality, Table 12 introduces an important dimension in terms of sexual and reproductive rights. As we can see, there is a positive relationship between the high number of births and the risk of dying at birth. There is a need to move forward in guaranteeing sexual and reproductive rights in order to reduce this kind of mortality. Gender equality is an element that can never be absent at the time of defining health policies.

TABLE 12 **LATIN AMERICA AND THE CARIBBEAN (SELECTED COUNTRIES): CHILD MORTALITY PER INTERGENESIC INTERVAL LOWER THAN 24 MONTHS, PARITY AND AGE OF THE MOTHER, 2002- 2006**

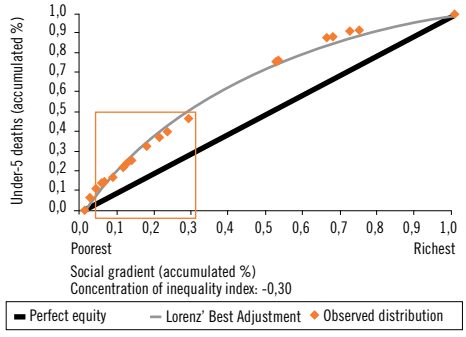
	Inter-genesic Interval	Parity				Age of the mother (in years)		National Total
	< 2 Years	First	Second-Third	Fourth-Sixth	Seventh +	<20	40- 49	(10 years earlier)
Bolivia (2003)	115	55	60	77	90	79	74	68
Colombia (2005)	35	21	20	27	40	25	35	22
Guatemala (2002)	58	47	36	45	52	51	93	44
Haiti (2005/2006)	97	73	58	66	97	81	98	57
Honduras (2005)	43	28	26	28	42	35	59	29
Nicaragua (2001)	60	28	33	33	59	42	45	35
Peru (2004/2005)	63	20	35	33	40	42	25	30
Dominican Republic (2002)	57	29	30	52	57	41	32	35

Source: Economic Commission for Latin America and the Caribbean (ECLAC), based on [on line] official data http://www.measuredhs.com; and numbers obtained through STAT compiler processing in the same site

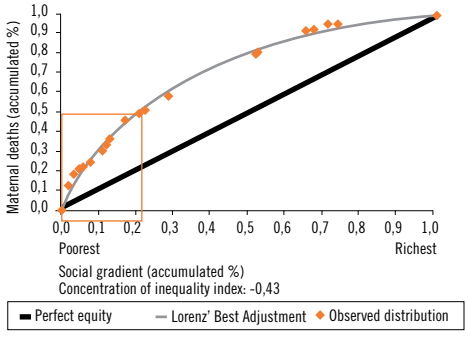
Currently, the most sensitive indicator to measure poverty is the maternal mortality rate. The next Chart shows the distribution of maternal and child mortality per country income levels.

CHART 13

INEQUALITIES IN CHILD SURVIVAL: CONCENTRATION AND UNDER-5 MORTALITY RATE IN THE AMERICAN REGION CURVE, AROUND 2005.



INEQUALITIES IN MATERNAL HEALTH: CONCENTRATION AND MATERNAL MORTALITY INDEX IN THE AMERICAN REGION, AROUND 2005.



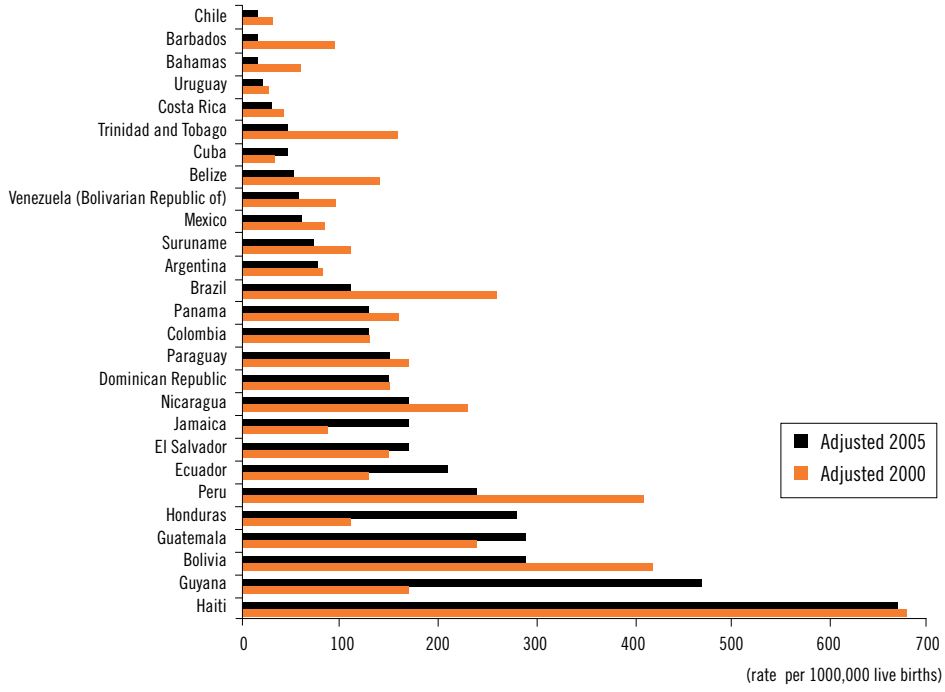
Source: Pan-American Health Organization. Health Situation in the Americas. Basic Indicators 2006 /(same)

As can be seen, the maternal mortality curve is bigger showing higher inequality levels. Forty-eight percent of maternal deaths occur in the poorest 20% of the population.

As in other indicators, the level of regional heterogeneity is high. One aspect to be highlighted is that, unlike the child mortality rate, maternal mortality rates have not been reduced in some countries.

We know that maternal mortality rate is an indicator that is not always reliable, due to under- recording of deaths caused by abortion and deficits in primary healthcare, that result in under- registration of deaths. However, even with these problems, it is a key indicator to measure inequality.

CHART 14 **MATERNAL MORTALITY RATE LATIN AMERICA AND THE CARIBBEAN COUNTRIES 2000-2005**
(MATERNAL DEATHS PER 100,000 LIVE BIRTHS)



Source: ECLAC, based on UNICEF, United Nations Fund for Children, The State of the World's Children 2008. Database online. Information consulted in August 2008

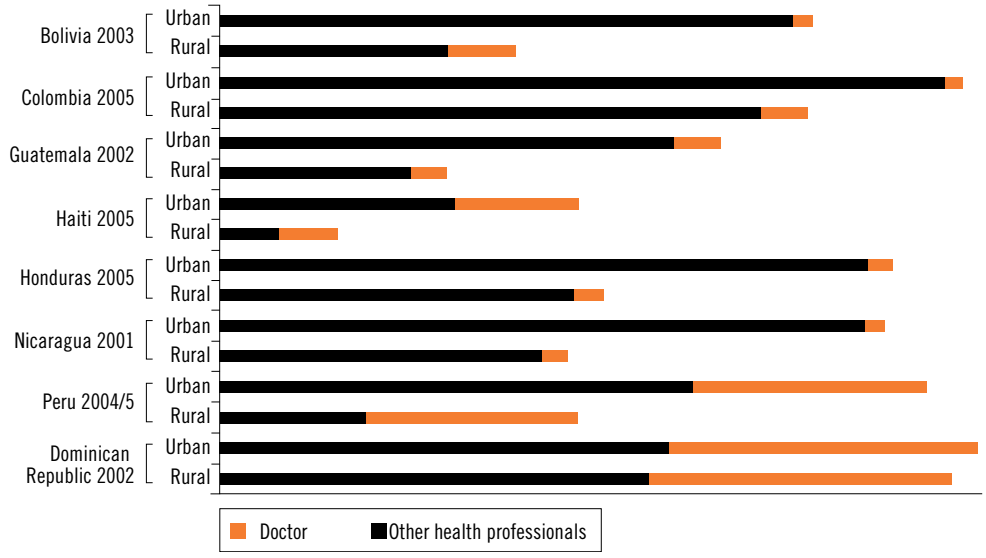
2.2 Healthcare during pregnancy and birth

In most cases, maternal mortality is avoidable. Sexual and reproductive rights as well as primary health care policies, coupled with adequate health services networks are central elements to advance in this regard.

Examining inequalities in access to health services during pregnancy and birth reveals some of the reasons why the region exhibits high degrees of inequality in women's right to health today.

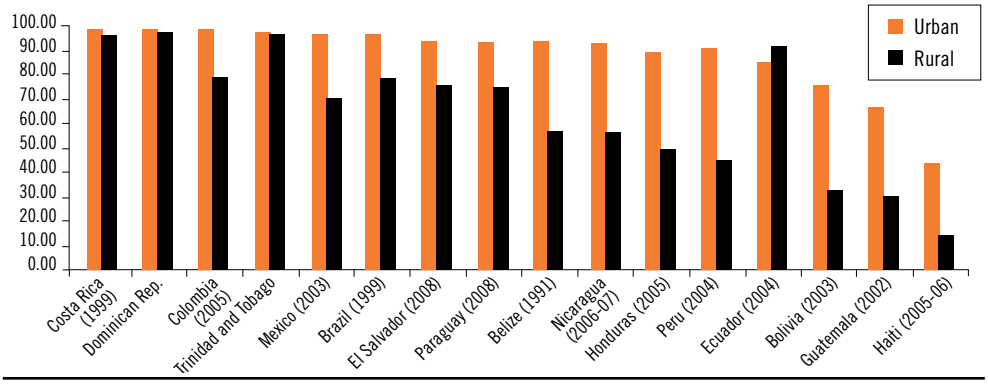
Chart 15 shows inequalities in attended births. Those living in rural areas have less accessibility, so if we add the differences in conditions of living between urban and rural areas to the analysis, we can see a negative relationship between a greater need and the access to health services.

CHART 15 **LATIN AMERICA AND THE CARIBBEAN (SELECTED COUNTRIES): BIRTHS ATTENDED BY QUALIFIED PERSONNEL, BY MOTHER'S RESIDENCE AREA, 2002-2006**
(IN PERCENTAGES)



Source: Economic Commission for Latin America and the Caribbean (ECLAC), based on demographic and health statistics (DHS); figures obtained through STAT compiler processing; and final reports and data from reproductive health surveys by Centres for Disease Control (CDC)

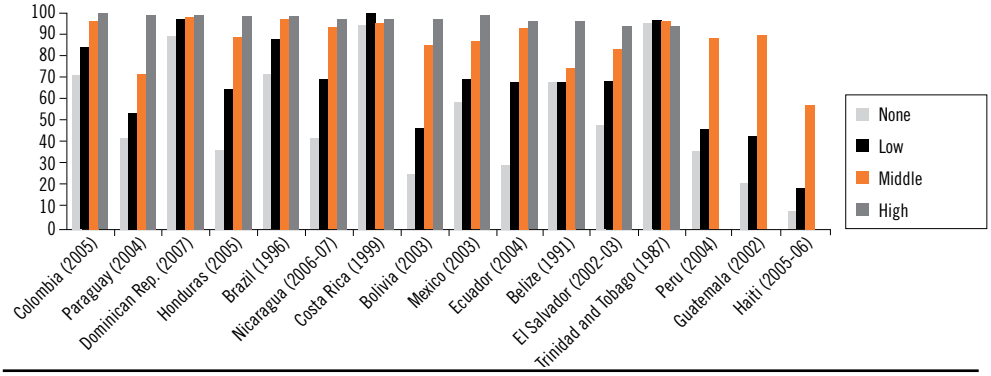
CHART 16 **PERCENTAGE OF ASSISTED BIRTHS BY MOTHER'S RESIDENCE AREA**



Source: Flórez, Carmen Elisa and Victoria Eugenia Soto (2008)

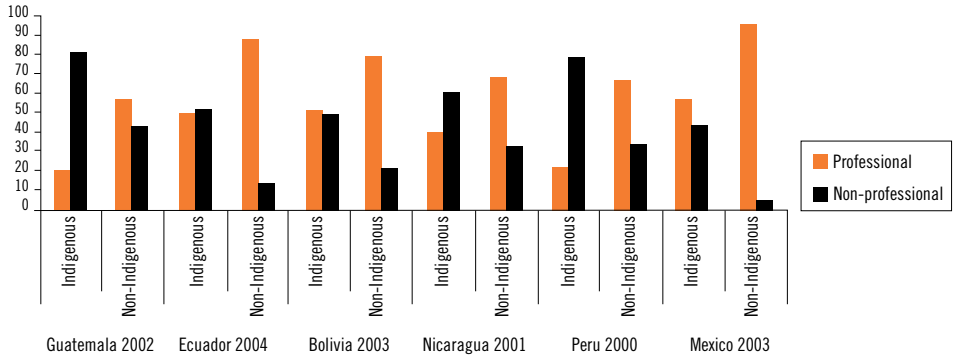
The next chart (17) compares the quality of attention received to the mother's educational level. Taking into account inequalities in access to education, the highest education level is an indicator that allows the introduction of the differences according to poverty levels, due to the high existing correlation between education and poverty. Also, different indicators show a higher number of births in women with lower educational levels, as well as a strong relationship between the high number of births and maternal mortality. Again we find a situation in which those who are the most at risk receive the lowest levels of attention during childbirth.

CHART 17 **PERCENTAGE OF ATTENDED BIRTHS BY MOTHERS' EDUCATIONAL LEVELS**



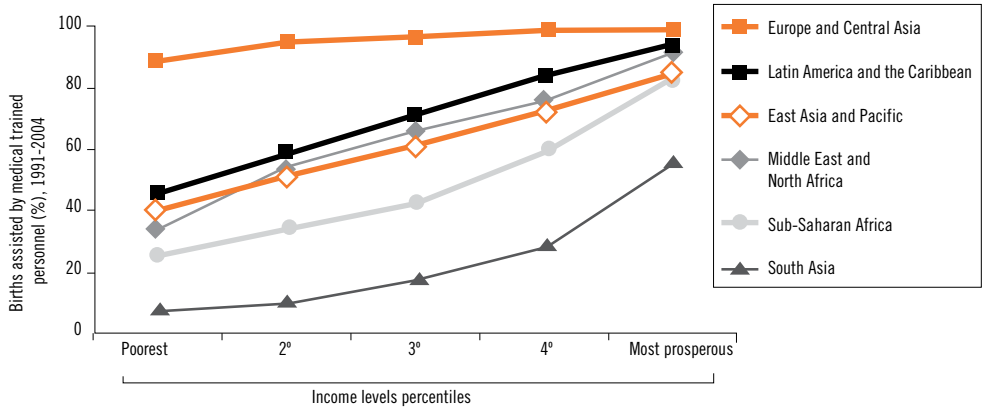
Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

CHART 18 **TYPE OF ATTENTION RECEIVED AT BIRTH BY ETHNICITY. SELECTED COUNTRIES**



Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

CHART 19 **WOMEN ASSISTED BY QUALIFIED PERSONNEL AT BIRTH, BY INCOME PERCENTILES AND REGIONS**



Source: Unicef (2008)

Inequity is not restricted to access to proper care at birth. It is present throughout the process. In Table 13, a few indicators linked to pregnancy care are presented.

From a gender perspective, the following Table is very illustrative. In 2005, a specific number of pre-birth consultations was integrated to the Millennium Development Goals, a commitment agreed to by almost 190 countries from around the world, including practically all countries in the region. All United Nations offices are making important efforts to monitor the advances made. Even though, as you will see in the latest data available (ECLAC, follow-up to the MDGs), many countries do not have this indicator yet. The lack of visibility of deficits in pregnancy and birth care is an indicator showing the importance of this dimension for health policies. A proper recording system in the health sector must track this indicator in a regular fashion.

TABLE 13 **PRE-NATAL CARE COVERAGE - AT LEAST 4 CONSULTATIONS**
LATIN AMERICAN AND CARIBBEAN COUNTRIES
(PERCENTAGE)

	Value	Survey year
Dominican Republic	93,5	2002
Jamaica	87,2	1997
Peru	87	2004
Colombia	83,1	2005
Honduras	80,8	2006
Paraguay	78,8	2004
Brazil	75,9	1996
Nicaragua	71,6	2001
El Salvador	71,2	2003
Bolivia	57,9	2003
Ecuador	57,5	2004
Haiti	53,8	2006

Table 14 shows that inequalities are present throughout pregnancy. The gaps are remarkable. There is a need to broaden primary health care services but also to integrate a gender perspective in pregnancy and birth care, in order to move towards inclusive services respecting cultural guidelines and guaranteeing the right to life for women during pregnancy and at the time of giving birth.

TABLE 14 **PROPER PRENATAL CARE * PER AREA, EDUCATIONAL LEVEL AND AGE GROUP, PER COUNTRY (%)**

Country	DHS	Total	Residence area			Educational levels				Age group			
		Total	Urban	Rural	Urb/ Rural	None	Primary	Secondary or more	Secondary/ None	<20	20- 34	35- 49	35- 49/ <20
	1990	71,1	79,0	53,6	1,47	37,0	60,2	85,3	2,3	65,6	72,9	65,1	1,01
	1995	74,8	83,7	56,4	1,48	33,6	62,4	87,9	2,61	70,1	76,2	71,3	0,98
	2000	81,1	86,1	68,6	1,26	55,0	70,2	89,4	1,63	70,1	83,1	79,3	0,88
Colombia	2005	84,6	88,5	74,6	1,19	55,5	75,9	90,0	1,62	80,7	85,3	83,9	0,96
	1996	53,7	68,9	27,3	2,52	19,6	33,9	73,0	3,72	43,5	55,9	49,9	0,87
	2000	53,7	68,9	27,3	2,52	19,6	33,9	73,0	3,72	43,5	55,9	49,9	0,87
Peru	2004	86,8	92,6	78,7	1,18	74,8	77,5	92,6	1,24	86,2	88,6	82,5	1,04
	1991	86,3	91,6	77,7	1,18	59,1	82,5	96,3	1,63	78,8	87,7	82,5	0,96
	1996	89,4	92,3	84,8	1,09	72,2	86,2	96,9	1,34	79,1	90,9	89,2	0,89
	1999	93,5	93,8	92,9	1,01	68,3	90,8	97,5	1,43	84,2	93,9	97,9	0,86
Dominican Republic	2002	95,3	96,0	93,9	1,02	85,0	93,8	97,6	1,15	93,0	95,7	95,1	0,98
	1994	32,7	49,2	13,6	3,63	6,6	21,3	56,7	8,66	21,5	37,3	22,7	0,95
	1998	51,9	66,4	29,3	2,26	19,5	35,6	75,8	3,88	44,1	55,5	44,7	0,99
Bolivia	2003	58,7	68,6	43,2	1,59	33,1	48,4	81,3	2,45	55,8	62,5	48,9	1,14
	1994/95	40,9	61,0	26,8	2,28	20,6	46,2	74,4	3,61	31,9	43,7	35,9	0,89
Haiti	2000	45,7	63,0	36,2	1,74	30,1	47,4	74,0	2,46	37,2	49,7	38,7	0,96
	1995	67,3	75,6	62,9	1,2	56,0	69,0	89,6	1,6	66,3	69,5	61,2	1,08
Guatemala	1998/99	71,6	78,9	66,7	1,18	60,6	71,7	91,1	1,5	69,4	73,2	67,6	1,03

* Number of prenatal consultations higher or equal to 4 for the last child born alive.
Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

TABLE 15 **MONTH OF PREGNANCY AT THE TIME OF THE FIRST PRENATAL CONSULTATION* BY AREA, EDUCATIONAL LEVEL AND AGE GROUP, BY COUNTRY (%)**

Country/year DHS	Months first prenatal consult.	Total	Area of residence			Educational Level				Age group			
		Total	Urban	Rural	Urb/ Rural	None	Primary	Secondary or more	Secondary/ None	<20	20- 34	35- 49	35- 49/ <20
Colombia 2005	<4	70,7	74,9	59,9	1,25	52,5	59,9	76,6	1,46	56,2	72,2	72,7	0,77
	4- 6	20,4	18,8	24,6	0,77	13,7	25,5	18,4	1,35	33,4	19,5	17,3	1,93
	>6	8,9	6,3	15,6	0,40	33,8	14,7	5,0	0,15	10,5	8,3	10,1	1,04
	Total	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00
Peru 2004	<4	69,6	77,1	59,1	1,30	60,2	60,1	75,3	1,25	60,8	70,0	70,8	0,86
	4- 6	21,4	18,0	26,2	0,69	22,8	25,7	19,1	0,84	29,0	21,7	18,5	1,56
	>6	9,0	5,0	14,7	0,34	17,0	14,3	5,7	0,33	10,2	8,2	10,7	0,96
	Total	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00
Dominican Republic 2002	<4	82,5	84,0	79,4	1,06	70,1	77,8	88,2	1,26	71,3	83,9	83,6	0,85
	4- 6	15,2	14,0	17,8	0,79	22,6	19,3	10,6	0,47	26,0	13,9	14,1	1,84
	>6	2,3	2,0	2,8	1,73	7,3	2,9	1,3	0,18	2,7	2,2	2,3	1,17
	Total	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00
Bolivia 2003	<4	51,7	58,4	41,1	1,42	31,8	44,9	67,2	2,11	43,9	55,0	44,7	0,98
	4- 6	22,5	23,0	21,8	1,05	18,8	22,5	23,4	1,24	29,5	22,8	19,9	1,48
	>6	25,8	18,6	37,1	0,50	49,4	32,5	9,4	0,19	26,5	22,2	35,5	0,75
	Total	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00
Haiti 2000	<4	46,8	60,0	39,6	1,52	32,2	49,1	71,4	2,22	50,9	49,2	40,2	1,27
	4- 6	27,3	24,8	28,7	0,86	28,9	28,1	21,7	0,75	24,9	28,2	25,8	0,97
	>6	25,9	15,3	31,8	0,48	38,9	22,7	7,0	0,18	24,2	22,6	34,1	0,71
	Total	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00
Guatemala 1998/ 99	<4	53,3	62,3	47,2	1,32	39,5	53,9	75,7	1,92	47,9	55,5	48,1	0,99
	4- 6	30,4	26,0	33,3	0,78	34,3	31,4	20,4	0,60	38,1	29,1	31,7	1,20
	>6	16,4	11,7	19,5	0,60	26,2	14,7	3,8	0,15	14,0	15,4	20,2	0,69
	Total	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00	100,0	100,0	100,0	1,00

* Estimated for the last live born child. Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

3. REPRODUCTIVE RIGHTS AND FAMILY PLANNING

This dimension is key to ensure equality between men and women. Gender equality is a necessary pre-condition for women's full autonomy. Just as with other indicators linked to gender equality, deficits in statistical systems are remarkable. In this dimension, there is a significant lack of data, showing the lack of importance that progress in sexual and reproductive rights has – and has had – for the public agenda.

Even with the scarce data available the current inequality is visible. The poorest sectors have a greater demand for family planning and, at the same time, lesser access. It is important to highlight this direct correspondence and correlation: the greater the necessity, the fewer the existing public services. Investing in family planning policies – that require quality primary health care services – is a key to guarantee the right to health and equal opportunities for men and women.

A useful indicator to reveal the need to strengthen family planning policies is the analysis of wanted fertility. This data usually comes from surveys, even though it could be included in birth registration cards. Two questions are included in the surveys: What is the ideal number of children? How many children do you have? Let us see the gaps that become manifest when the answers are analyzed.

TABLE 16 **DESIRED AND ACTUAL FERTILITY BY EDUCATIONAL LEVEL. SELECTED COUNTRIES**

Country	DHS	Desired Fertility				Actual Fertility			Difference (actual-desired)			
		No education	Primary	Secondary or higher	None/ Secondary.	No education	Primary	Secondary or higher	No education	Primary	Secondary or higher	None/ Second.
	1986	2,8	2,6	1,8	1,6	5,2	3,9	2,4	2,4	1,3	0,6	4,0
	1990	2,9	2,3	1,9	1,5	4,8	3,5	2,3	1,9	1,2	1,4	4,8
	1995	2,6	2,6	2	1,3	5,0	3,8	2,5	2,4	1,2	0,5	4,8
	2000	2,0	2,3	1,7	1,2	4,0	3,6	2,2	2,0	1,3	0,5	4,0
Colombia	2005	2,5	2,1	1,6	1,6	4,5	3,4	2,1	2,0	1,3	0,5	4,0
	1986	3,3	2,7	2,0	1,7	6,6	5,0	2,9	3,3	2,3	0,9	3,7
	1992	3,7	2,5	1,8	2,1	7,0	5,1	2,6	3,3	2,6	0,8	4,1
	1996	4,0	2,8	1,9	2,1	6,9	5,0	2,6	2,9	2,2	0,7	4,1
	2000	3,0	2,3	1,6	1,9	5,1	4,1	2,2	2,1	1,8	0,6	3,5
Peru	2004	1,4	2,1	1,4	1,0	4,3	3,6	2,0	2,9	1,5	0,6	4,8
	1986	3,5	2,9	2,4	1,5	5,2	4,2	2,7	1,7	1,3	0,3	5,7
	1991	3,3	2,8	2,4	1,4	5,2	3,8	2,8	1,9	1,0	0,4	4,8
	1996	3,1	2,8	2,1	1,5	5,0	3,7	2,5	1,9	0,9	0,4	4,8
Dominican	1999	1,3	2,5	1,8	0,7	2,2	3,5	2,1	0,9	1,0	0,3	3,0
Republic	2002	3,0	2,7	2,2	1,4	4,5	3,6	2,5	1,5	0,9	0,3	5,0
	1989	3,4	3,1	2,3	1,5	6,4	6,0	3,3	3,0	2,9	1,0	3,0
	1994	3,3	3,4	2,2	1,5	6,5	6,1	3,2	3,2	2,7	1,0	3,2
	1998	3,8	3,1	2,1	1,8	7,1	5,7	2,9	3,3	2,6	0,8	4,1
Bolivia	2003	3,1	2,5	1,8	1,7	6,8	4,9	2,5	3,7	2,4	0,7	5,3
	1994/95	4,0	3,1	1,8	2,2	6,1	4,8	2,5	2,1	1,7	0,7	3,0
Haiti	2000	3,6	3,4	1,9	1,9	6,1	5,3	2,7	2,5	1,9	0,8	3,1
	1987 (1)	5,7	3,9	2,4	2,4	6,8	5,1	2,7	1,1	1,2	0,3	3,7
	1995	5,6	4,0	2,3	2,4	7,1	5,1	2,5	1,5	1,1	0,2	7,5
Guatemala	1998/99	5,7	4,1	2,5	2,3	6,8	5,2	2,9	1,1	1,1	0,4	2,8

1) Data from 15-44 year old women. Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

TABLE 17 **DESIRED FERTILITY BY AREA OF RESIDENCE**

Country	DHS	Desired fertility			Actual Fertility			Difference (actual-desired)			
		Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural	Rural/ Urb
	1986	2,1	1,9	2,8	3,2	2,6	4,7	1,1	0,7	1,9	2,7
	1990	2,1	2,0	2,3	2,8	2,5	3,6	0,7	0,5	1,3	2,6
	1995	2,2	1,9	2,8	3,0	2,5	4,3	0,8	0,6	1,5	2,5
	2000	1,8	1,6	2,3	2,6	2,3	3,8	0,8	0,7	1,5	2,1
Colombia	2005	1,7	1,5	2,1	2,4	2,1	3,4	0,7	0,6	1,3	2,2
	1986	2,3	1,9	3,3	4,1	3,1	6,3	1,8	1,2	3,0	2,5
	1992	2,0	1,7	3,0	3,5	2,8	6,2	1,5	1,1	3,2	2,9
	1996	2,2	1,9	3,1	3,5	2,8	5,6	1,3	0,9	2,5	2,8
	2000	1,8	1,5	2,5	2,8	2,2	4,3	1,0	0,7	1,8	2,6
Peru	2004	1,5	1,4	1,8	2,4	2,0	3,6	0,9	0,6	1,8	3,0
	1986	2,6	2,4	3,0	3,7	3,1	4,8	1,1	0,7	1,8	2,6
	1991	2,6	2,3	3,1	3,3	2,8	4,4	0,7	0,5	1,3	2,6
	1996	2,5	2,2	3,0	3,2	2,8	4,0	0,7	0,6	1,0	1,7
Dominican	1999	2,0	1,9	2,4	2,7	2,5	3,0	0,7	0,6	0,6	1,0
Republic	2002	2,3	2,3	2,5	3,0	2,8	3,3	0,7	0,5	0,8	1,6
	1989	2,7	2,3	3,5	5,0	4,0	6,6	2,3	1,7	3,1	1,8
	1994	2,7	2,4	3,3	4,8	3,8	6,3	2,1	1,4	3,0	2,1
	1998	2,5	2,2	3,2	4,2	3,3	6,4	1,7	1,1	3,2	2,9
Bolivia	2003	2,1	1,9	2,6	3,8	3,1	5,5	1,7	1,2	2,9	2,4
	1994/ 95	3,0	2,2	3,7	4,8	3,3	5,9	1,8	1,1	2,2	2,0
Haiti	2000	2,8	2,2	3,3	4,7	3,4	5,8	1,9	1,2	2,5	2,1
	1987 (1)	4,4	3,0	5,3	5,5	4,0	6,4	1,1	1,0	1,1	1,1
	1995	4,0	3,0	4,8	5,1	3,8	6,1	1,1	0,8	1,3	1,6
Guatemala	1998/ 99	4,1	3,4	4,6	5,0	4,1	5,8	0,9	0,7	1,2	1,7

1) Information from 15-44 year old women.
Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

Even though the data show an improvement in reducing the gap between desired and actual fertility, there are important challenges to guarantee women's rights to make autonomous decisions around motherhood.

The adolescent maternity indicator also illustrates the existing inequalities. In a context where fertility rates are being reduced, an increase in the number of live births by adolescent mothers is also growing. Available indicators show that adolescent fertility is higher in contexts where vulnerability is also high.

CHART 20 **LATIN AMERICA AND THE CARIBBEAN. PROPORTION OF ADOLESCENTS THAT ARE MOTHERS,* BY EDUCATIONAL LEVEL. SELECTED COUNTRIES**

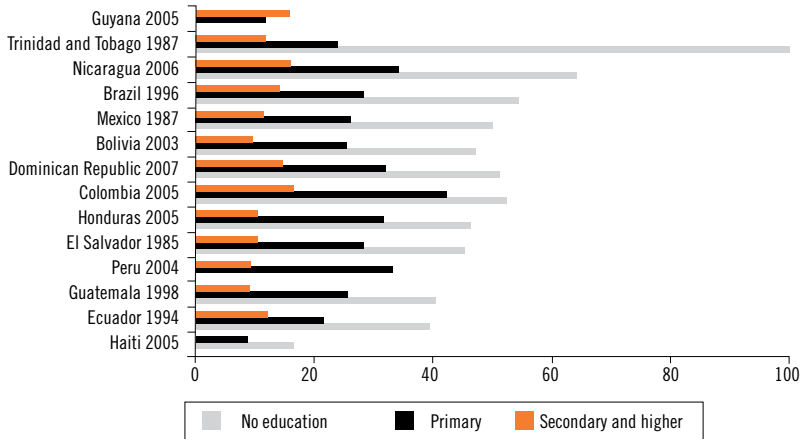


CHART 21 **LATIN AMERICA. PROPORTION OF ADOLESCENTS WHO ARE MOTHERS, BY ETHNICITY STATUS. SELECTED**

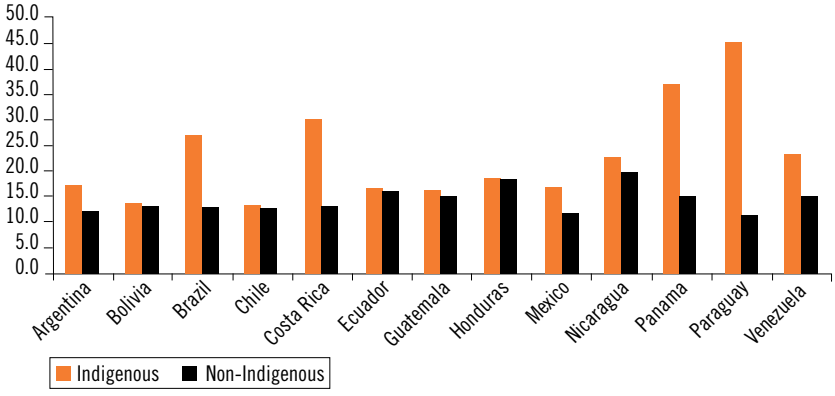
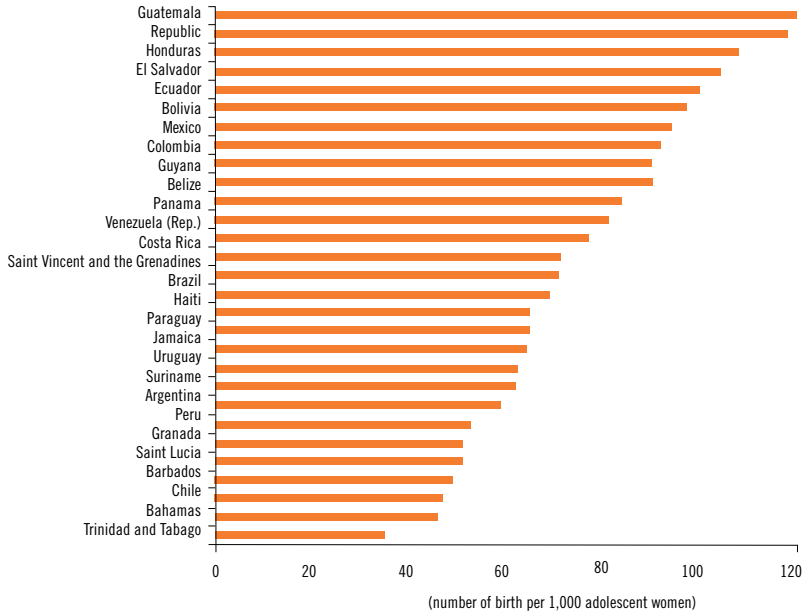


CHART 22 **ADOLESCENT FERTILITY RATE**
LATIN AMERICAN AND CARIBBEAN COUNTRIES BETWEEN 2000 AND 2004
(NUMBER OF BIRTH PER 1,000 ADOLESCENT WOMEN)



Notes:
*Survey year: Trinidad and Tobago, Dominican Republic, Haiti, Mexico

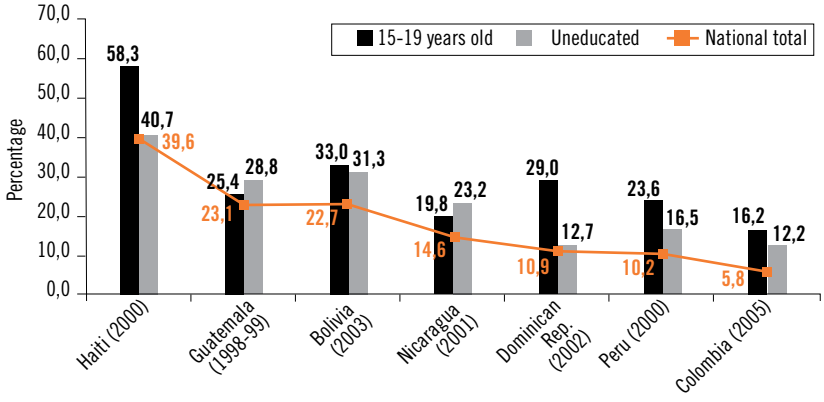
Source: ECLAC, based on United Nations, Economic and Social Issues Department, Population Division. Use of contraception worldwide, 2007

TABLE 18 **PROPORTION OF ADOLESCENTS WHO ARE MOTHERS AND PREGNANT, BY AREA OF RESIDENCE AND EDUCATIONAL LEVEL. SELECTED COUNTRIES.** IN PERCENTAGES

Country	DHS	Total	Residence area			Educational level			
		Total	Urban	Rural	Rural/ Urb	Educational level	Primary	Second. or higher	one/ Sec
Colombia	1986	13,6	10,9	20,4	1,9	26,2	22,3	6,9	3,8
	1990	12,8	11,8	16,2	1,4	62,4	20,3	7,5	8,3
	1995	17,4	14,6	25,5	1,7	50,7	29,2	12,1	4,2
	2000	19,1	16,9	26,2	1,6	45,5	33,7	15,0	3,0
	2005	20,5	18,5	26,9	1,5	52,3	42,3	16,3	3,2
Peru	1986	12,7	8,2	22,8	2,8	25,9	22,3	7,4	3,5
	1992	11,4	8,0	24,7	3,1	38,6	27,6	6,9	5,6
	1996	13,4	9,3	25,5	2,7	55,5	30,6	8,3	6,7
	2000	13,0	9,2	21,7	2,4	36,9	26,4	9,2	4,0
	2004	12,7	9,5	20,3	2,1	34,5*	34,5	3,0**	
Dominican Republic	1986	17,4	15,3	21,0	1,4	47,1	21,2	8,1	5,8
	1991	17,6	13,2	26,7	2,0	44,2	22,1	10,2	4,3
	1996	22,7	18,4	30,6	1,7	58,3	29,6	11,0	5,3
	1999	20,8	21,4	19,3	0,9	31,1	27,0	13,8	2,3
	2002	23,3	21,0	28,1	1,3	60,7	34,2	14,1	4,3
Bolivia	1989	17,2	11,5	27,5	2,4	26,3	28,7	9,4	2,8
	1994	17,5	14,9	22,2	1,5	37,6	28,1	12,4	3,0
	1998	13,7	11,1	21,8	2,0	51,5	28,9	8,8	5,9
	2003	15,7	12,9	21,9	1,7	47,2	25,2	9,8	4,8
Haiti	1994/ 95	14,5	12,3	16,4	1,3	25,6	15,1	7,8	3,3
	2000	18,0	13,3	22,8	1,7	44,6	18,8	10,7	4,2
Guatemala	1987	22,8	12,8	28,6	2,2	39,1	23,0	4,8	8,1
	1995	21,1	14,7	26,1	1,8	37,4	25,3	7,5	5,0
	1998/ 99	21,6	16,0	25,7	1,6	40,5	25,6	9,2	4,4

* Primary
** Higher
Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

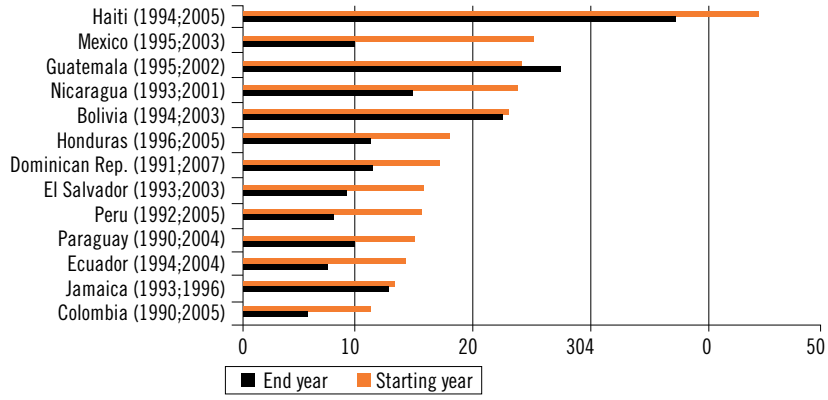
CHART 23 **UNMET CONTRACEPTION NEEDS FOR UNEDUCATED WOMEN AND ADOLESCENTS. SELECTED COUNTRIES.** LATEST DATA AVAILABLE

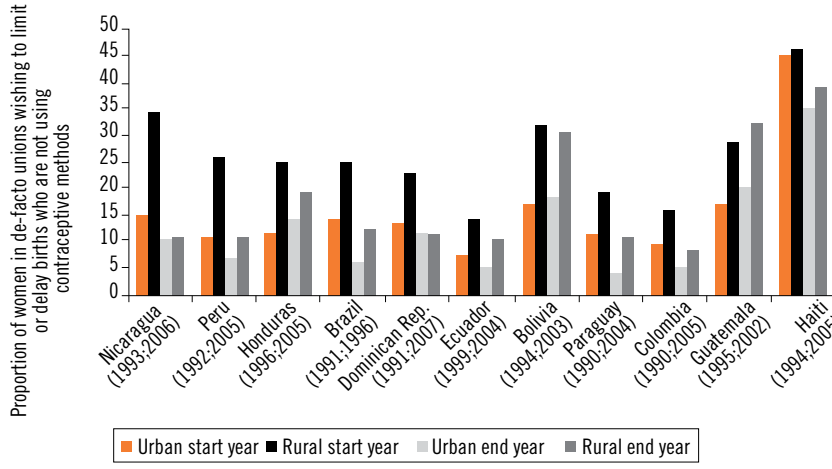


Source: Demographic and health surveys conducted in the different countries

Chart 24 shows the available data of unmet demands and prevalence of contraceptive use. Countries with low prevalence in the use of condoms according to the surveys, show a high unmet demand, as the reason is not that people don't want to use them; this is an area in which policies are needed.

CHART 24 **UNMET NEEDS FOR FAMILY PLANNING.** SELECTED COUNTRIES





Source: Own production based on data from System of Indicators for Monitoring the ICPD Program of Action. For further information see technical notes in www.cepal.org/celade

CHART 19 **LATIN AMERICA AND THE CARIBBEAN:** UNMET FAMILY PLANNING DEMANDS FROM WOMEN IN DE-FACTO UNIONS PER EDUCATIONAL LEVEL. SELECTED COUNTRIES

Country	Year	Total	No education	Low	Middle	High
	1994	24,3	35,8	29,1	21,5	12,1
Bolivia	2003	22,7	31,3	26,4	17,1	9,3
	1995	7,7	13,1	9,2	6,5	3,8
Colombia	2005	5,8	12,2	6,4	5,5	3,7
	1995	24,3	29,8	25,8	10,9	2,7
Guatemala	2002	27,6	38,1	27,1	12,2	-
	1994	44,5	40,4	47,3	43,6	-
Haiti	2005	37,5	38,2	40,2	33,2	-
	1997	14,7	21,7	17	15,6	9,4
Nicaragua	2006	10,7	12,9	11,3	10,2	7
	1990	20	34,7	23,8	19,4	10,9
Paraguay	2004	606	13,5	7,20	4,8	1,6
	1992	16,2	30,1	20,4	13,1	7,5
Peru	2005	8,1	14,8	9,5	7,4	5,5
	1991	17,20	30,2	20	17,5	11,8
Dominican Rep.	2007	11,4	11,4	11,4	12,5	8,9

TABLE 20 **KNOWLEDGE OF FAMILY PLANNING METHODS AMONG 15-49 YEAR OLD WOMEN, BY PLACE OF RESIDENCE AND EDUCATIONAL LEVEL. SELECTED COUNTRIES.** IN PERCENTAGES

Country	DHS	Total		Educational level				
		Total		Urban		Rural		U/ R
		Any method	Modern method	Any method	Modern method	Any method	Modern method	Modern method
	1986	99,5	99,4	99,7	99,7	99,0	98,8	1,0
	1990	997	99,7	99,6	99,6	100,0	100,0	1,0
	1995	99,9	99,9	100,0	100,0	99,8	99,6	1,0
	2000	99,9	99,9	100,0	100,0	99,8	99,7	1,0
Colombia	2005	99,9	99,9	100,0	100,0	99,8	99,6	1,0
	1992	96,9	94,5	99,2	98,5	91,1	84,5	1,2
	1996	97,8	96,2	99,6	99,2	94,0	89,7	1,1
Peru	2000	99,0	98,4	99,9	99,8	97,4	95,9	1,0
	1986	99,3	99,3	100,0	100,0	98,4	98,2	1,0
	1990	99,8	99,8	100,0	100,0	99,6	99,6	1,0
	1996	99,7	99,7	100,0	100,0	99,4	99,3	1,0
	1999	100,0	100,0	100,0	100,0	99,9	99,9	1,0
Dominican Republic	2002	99,8	99,8	99,8	99,8	99,7	99,7	1,0
	1989	75,0	67,5	86,0	81,5	61,4	50,2	1,6
	1994	84,5	76,7	94,7	91,7	69,8	54,9	1,7
	1998	89,3	86,2	97,2	95,7	73,9	67,5	1,4
Bolivia	2003	94,4	92,0	98,3	97,0	87,3	82,9	1,2
	1994/ 95	98,9	98,8	99,9	99,9	98,3	98,2	1,0
Haiti	2000	99,2	99,2	99,9	99,9	98,8	98,7	1,0
	1987 (1)	71,9	71,6	89,4	89,2	63,7	63,3	1,4
	1978 (1)	71,9	71,6	89,4	89,2	63,7	63,3	1,4
	1995	81,8	81,2	92,4	91,9	74,7	74,2	1,2
Guatemala	1998/ 99	85,1	84,8	95,3	95,0	77,5	77,3	1,2

Nivel educativo						
No education		Primary		Secondary or higher		Sec./No educ.
Any method	Modern method	Any method	Modern method	Any method	Modern method	Modern method
95,9	95,5	99,7	99,7	99,9	99,9	1,0
99,2	99,2	99,8	99,8	99,7	99,7	1,0
99,2	98,9	99,9	99,9	100,0	100,0	1,0
99,5	99,5	99,9	99,9	100,0	100,0	1,0
99,0	98,1	99,9	99,9	100,0	100,0	1,0
84,0	73,4	95,8	92,5	99,8	99,5	0,7
89,4	82,3	96,8	94,4	99,8	99,7	0,8
93,6	91,1	98,5	97,5	100,0	99,9	0,9
94,1	93,7	99,6	99,6	99,9	99,9	0,9
99,5	99,5	99,8	99,8	100,0	100,0	1,0
98,4	98,2	99,8	99,8	100,0	100,0	1,0
100,0	100,0	99,9	99,9	100,0	100,0	1,0
98,8	98,7	99,8	99,8	99,9	99,9	1,0
44,6	32,6	75,3	67,4	96,2	92,6	0,4
60,3	44,7	81,0	70,9	97,8	95,4	0,5
60,5	53,9	86,3	81,5	99,3	98,5	0,5
79,8	75,2	93,4	90,0	99,6	99,2	0,8
98,0	97,9	99,6	99,6	100,0	99,8	1,0
98,1	98,1	99,8	99,8	99,9	99,9	1,0
53,0	52,7	86,1	85,6	99,3	99,3	0,5
53,0	52,7	86,1	85,6	99,3	99,3	0,5
65,4	64,7	87,1	86,5	99,8	99,8	0,6
70,0	69,3	89,1	89,1	99,0	98,9	0,7

Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008

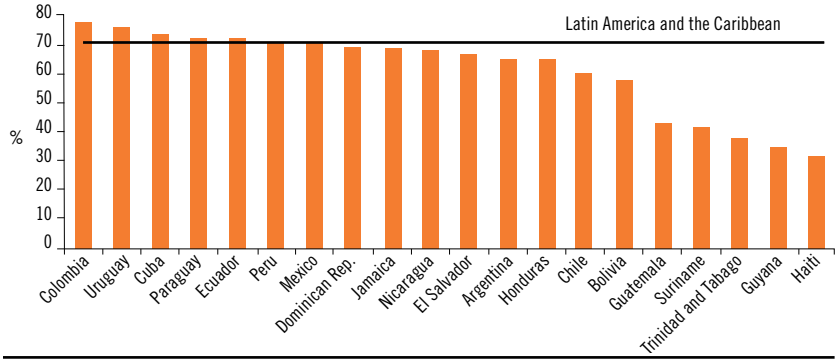
Surveys usually show a high level of knowledge of contraceptive use, even though there is still a need for progress in this regard. From a gender perspective, we know that information is important but not enough. There is a need to work on women's empowerment and on building more inclusive societies, otherwise, the advances will be only partial and the differences will increase. The change in cultural patterns, institutions, political and economic notions supporting the current inequalities between men and women is a requisite for guaranteeing the right to health.

TABLE 21 **DISTRIBUTION OF 15-49 YEAR OLD WOMEN BY ACTUAL USE OF FAMILY PLANNING METHODS, BY COUNTRY (%)**

Country	DHS	All women				In de-facto unions/married.				Sexually active but not in de-facto unions/ married			
		Any modern method	Any traditional or autoctonous method	Does not use	Total	Any modern method	Any traditional or autoctonous method	Does not use	Total	Any modern method	Any traditional or autoctonous method	Does not use	Total
Colombia	1986	31,9	7,0	61,1	100,0	52,5	12,3	35,2	100,0	57,8	8,6	33,6	100,0
	1990	33,0	6,9	60,1	100,0	54,6	11,5	33,9	100,0	46,5	18,7	34,8	100,0
	1995	39,5	8,6	51,9	100,0	59,3	12,9	27,8	100,0	56,8	18,1	25,1	100,0
	2000	43,8	9,0	47,2	100,0	64,0	12,9	23,1	100,0	64,0	20,1	15,9	100,0
	2005	49,4	7,0	43,6	100,0	68,2	10,0	21,8	100,0	68,5	12,5	19,0	100,0
Peru	1986	14,1	13,9	72,0	100,0	23,0	22,7	54,3	100,0	-	-	-	100,0
	1992	19,9	15,8	64,3	100,0	32,8	26,2	41,0	100,0	32,3	36,5	31,2	100,0
	1996	26,4	14,5	59,1	100,0	41,3	22,9	35,8	100,0	46,0	30,6	23,4	100,0
	2000	32,0	12,0	56,0	100,0	50,4	18,5	31,1	100,0	45,2	31,2	23,6	100,0
	2004	29,6	14,7	55,7	100,0	46,7	23,8	29,5	100,0	53,5	31,7	14,8	100,0
Dominican Republic	1986	29,1	1,9	69,0	100,0	46,5	3,3	50,2	100,0	-	-	-	100,0
	1991	33,9	2,9	63,2	100,0	51,7	4,7	43,6	100,0	46,6	8,6	44,8	100,0
	1996	41,3	3,3	55,4	100,0	59,3	4,4	36,3	100,0	51,7	11,5	36,8	100,0
	1999	45,6	3,2	51,2	100,0	64,0	5,2	30,8	100,0	64,6	4,9	30,5	100,0
	2002	48,2	3,0	48,8	100,0	65,8	4,0	30,2	100,0	55,4	7,7	36,9	100,0
Bolivia	1989	8,0	11,8	80,2	100,0	12,2	18,0	69,8	100,0	14,5	20,4	65,1	100,0
	1994	11,9	18,3	69,8	100,0	17,8	27,5	54,7	100,0	23,7	38,1	38,2	100,0
	1998	16,5	14,9	68,6	100,0	25,2	23,1	51,7	100,0	37,8	23,3	38,9	100,0
	2003	23,7	15,6	60,7	100,0	34,9	23,4	41,7	100,0	38,7	26,5	34,8	100,0
Haiti	1994/ 95	8,9	3,4	87,7	100,0	13,2	4,7	82,1	100,0	13,9	14,4	71,7	100,0
	2000	15,8	3,6	80,6	100,0	22,8	5,2	72,0	100,0	30,8	8,8	60,4	100,0
Guatemala	1987 (1)	13,4	2,8	83,8	100,0	19,0	4,2	76,8	100,0	36,4	6,8	56,8	100,0
	1995	18,4	3,0	78,6	100,0	26,9	4,5	68,6	100,0	35,4	6,2	58,4	100,0
	1998/ 99	21,7	4,9	73,4	100,0	30,9	7,3	61,8	100,0	46,7	1,8	51,5	100,0

1) Information from 15-44 year old women. * Modern methods include female and male sterilization, pills, IUDs, injections, implants, condoms, gel/foam, breastfeeding amenorrhea and emergency contraceptives. Traditional methods include abstinence and withdrawal. Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008)

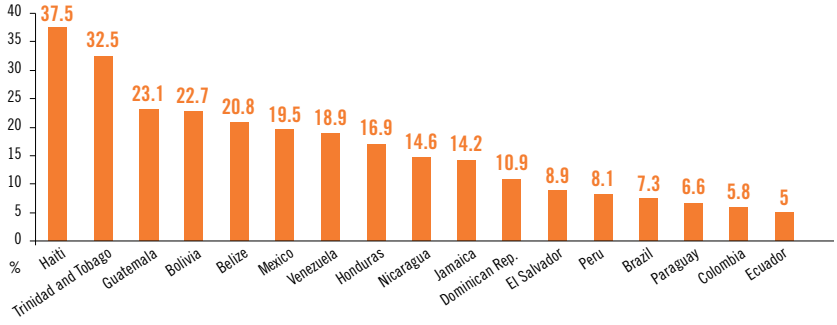
CHART 25 **CONTRACEPTIVE USE RATE IN 15-49 YEAR OLD WOMEN**
LATIN AMERICAN AND CARIBBEAN COUNTRIES – 2000-2006* (PERCENTAGES)



Notes: * Information taken from surveys conducted in the countries in different years.
Source: ECLAC based on WHO, World Health Organization. Statistical Information System. Information downloaded in August 2008. United Nations, Economic and Social Issues Department, Population Division. World fertility patterns 2007

Unmet needs in terms of family planning are strongly associated with situations of vulnerability. That is why public policies and the role of the State are key to progress in this regard.

CHART 26 **UNMET FAMILY PLANNING NEEDS**
17 COUNTRIES IN LATIN AMERICA AND THE CARIBBEAN (2000-2007) (PERCENTAGES)



Notes: a/Figures refer to women in the reproductive age who were married at least once.
Source: ECLAC based on United Nations, Population Division, Economic and Social Issues, Poster Contraceptive Use Worldwide 2007

TABLE 22 **PERCENTAGE OF WOMEN IN DE-FACTO UNION/MARRIED USING FAMILY PLANNING METHODS, BY SELECTED VARIABLES**

Country	DHS	Total	Residence			Educational level				Age group			
		Total	Urban	Rural	Urb/ Rural	No education	Primary	Secondary or higher	Secondary/ None	<20	20- 34	35- 49	35- 45/ <20
Colombia	1990	79,6	80,5	77,5	1,04	73,1	78,7	81,3	1,11	67,1	83,1	76,0	1,13
	1995	83,0	83,7	81,3	1,03	73,7	82,3	84,5	1,15	74,2	84,6	82,0	1,1
	2000	86,2	85,7	87,4	0,98	84,8	87,0	85,7	1,01	82,2	87,9	85,0	1,03
	2005	86,2	85,9	87,0	0,99	81,5	86,9	86,0	1,06	79,3	87,8	85,2	1,07
Peru	1992	80,9	82,1	78,1	1,05	71,5	79,2	83,7	1,17	73,8	86,1	75,2	1,02
	1996	81,4	82,6	78,6	1,05	69,0	80,0	84,2	1,22	78,7	86,9	74,6	0,95
	2000	82,5	83,3	81,0	1,03	70,4	81,1	85,0	1,21	82,0	88,2	76,3	0,93
	2004	82,4	84,4	78,9	1,07	73,8	81,1	83,7	1,13	80,6	87,4	77,9	0,97
Dominican Republic	1991	74,9	75,4	74,1	1,02	71,3	75,5	74,8	1,05	57,2	76,8	75,5	1,32
	1996	77,7	78,6	76,5	1,03	74,0	78,5	77,5	1,05	63,8	79,1	78,8	1,24
	1999	82,5	82,5	82,4	1,00	76,5	81,2	84,5	1,10	68,3	82,9	84,3	1,23
	2002	82,0	81,9	82,3	1,00	77,5	82,5	82,0	1,06	73,1	82,7	82,7	1,13
Bolivia	1994	74,2	78,2	68,4	1,14	60,2	72,5	81,5	1,35	67,6	80,7	66,2	0,98
	1998	74,4	77,0	69,2	1,11	60,2	72,9	79,3	1,32	64,6	79,8	68,9	1,07
	2003	81,0	82,5	78,4	1,05	64,9	81,4	84,3	1,30	78,6	87,2	73,6	0,94
Haiti	1994/ 95	62,4	68,1	59,1	1,15	54,8	67,0	74,6	1,36	72,9	66,4	54,8	0,75
	2000	67,7	67,8	67,6	1,00	62,5	70,6	72,5	1,16	74,7	72,6	60,3	0,81
Guatemala	1995	56,6	67,5	49,4	1,37	44,3	59,1	74,3	1,68	41,3	59,9	55,2	1,34
	1998/ 99	62,2	71,7	55,2	1,30	48,4	63,4	81,4	1,68	40,2	66,4	60,8	1,51

Source: Flórez, Carmen Elisa y Victoria Eugenia Soto (2008

FINAL COMMENTS

Due to time constraints, it is not possible to move further to other indicators. The effects of the diverse manifestations of poverty on the right to life demand policies that pay attention to emerging needs while also considering the need to move towards distribution of wealth within and among countries.

The Latin American reality shows a heterogeneous landscape due to the differences in the development of social protection systems and the diversity of demographic structures. Nevertheless, inequalities in the enjoyment of the right to health are present throughout the region.

In recent decades we have witnessed reductions in child mortality rates, partly as a result of changes in demographic processes. The few advances made in reducing maternal mortality expose the need for active policies to reduce it further. Investment in health and policies that reduce gender inequalities are two central issues in the health and globalization agenda.

Progress in ensuring equal opportunities for men and women is necessary to improve health conditions. The indicators throw light on the inequalities in terms of respect for sexual and reproductive rights – a key dimension to move further in this regard. Even though in this presentation the issue of abortion and its criminalization has not been addressed, it is clear that from a gender perspective, respect for women's full autonomy is a claim that introduces the need for legal reforms in the agenda.

Extending a primary health care services network that takes into account the specificities of men and women is a requisite to guarantee the right to life. Significant efforts need to be made by the different countries in this regard. Those countries with the lowest income are those that show the greatest deficits. A globalization process that ignores the current inequalities and continues the current trend of growing inequality will limit efforts in reducing the current inequities in the field of health.

BIBLIOGRAPHY

BERTRANOU, E. (2008). "Tendencias demográficas y protección social en América Latina y el Caribe" CEPAL, (LC/L.2864 -P). Santiago de Chile.

CELADE (2008). "Effects of Demographic Changes on Development in Latin America and the Caribbean" ECLAC. LC/G.2378(SES.32/14). Santiago de Chile.

DI CESARE, Mariachiara (2007). "Patrones emergentes en la fecundidad y la salud reproductiva y sus vínculos con la pobreza en América Latina y el Caribe". Centro Latinoamericano y Caribeño de Demografía (CELADE) – División de Población de la CEPAL. Santiago de Chile.

ECLAC (2006). "Shaping the Future of Social Protection: Access, Financing and Solidarity". Santiago de Chile.

——————— (2007). "Productive Transformation, Twenty Years On: Old Problems, New Opportunities". Santiago de Chile.

——————— (2008). "Progress Reports ECLAC- LAC". www.cepal.org\mdg

——————— (2008). "Social Panorama of Latin America, 2005". LC/G.2288-P. Santiago de Chile.

FLÓREZ, Carmen Elisa y SOTO, Victoria Eugenia (2008). "El estado de la salud sexual y reproductiva en América Latina y el Caribe: una visión global. BID. Departamento de Investigación, Documento de Trabajo #632. Washington.

GHERARDI, Natalia; PAUTASSI, Laura y GIACOMETTI Claudia (2008). "Sistemas de protección social y responsabilidades familiares. Articulaciones posibles." OIT. Buenos Aires.

MILOSAVLJEVIC, V. (2007). "Estadísticas para la equidad de género: magnitudes y tendencias en América Latina." Cuadernos de la CEPAL. 92. Santiago de Chile.

PAHO (2008). "Health in the Americas 2007." Washington.

UNICEF (2009). *The State of the World's Children 2009*. New York.

3. NEOLIBERALISM IN EDUCATION POLITICS AND PRACTICES IN LATIN AMERICA

Nelly P. Stromquist[1]

I would like to thank CLADEM for its invitation. It gives me great pleasure to be before a large group of women who are deeply knowledgeable about gender issues in the social world and who have shown a serious commitment to overcome those issues. In this article I will examine neoliberalism in education politics and practices. I have decided to refer to *neoliberalism* and not to globalization to better highlight the strong ideological component that is being spread through globalization.

When we discuss sectors like health, it is easy to identify serious problems like malnutrition, TB and gastrointestinal illnesses persisting in the Latin American region. On the contrary, when referring to education, the same concerns are not raised. To speak of children who fail to complete primary education or drop out of high school for lack of economic resources seems be less of a misfortune that when someone is facing health problems. And, nevertheless, it is through education that identities can be built in such a way that individual and collective improvement is encouraged and made feasible. In terms of women, education contributes to generate a process of knowledge distribution that might provide her with training or not, but whose consequences are not as concrete as to be immediately visible; rather, they appear gradually.

---

[1] Peruvian, long-term USA resident. She teaches Comparative Education in the International Education Policies Programme, School of Education, Maryland University.

Her expertise is on gender and education, from a critical sociology perspective. Her research interests are focused on the dynamics between education politics and practices, gender relations and social change.

She has authored several publication of an international level, and presided at the Comparative and International Education Society in the USA. Recipient of the Fullbright New Century Scholarship for the period 2005-2006.

To link my presentation to the preceding ones, I would like to make a few observations. In the first place, there are very strong global influences, widely demonstrated in the fields of economy, theology, culture and politics. Even though it is considered that globalization existed before the 20th century, I share the vision of the many who acknowledge that the current globalization is very different from every previous global attempt for its intensity, scope and compression in time and space (Held *et al*, 1999). Secondly, it is true that globalization does not manifest itself in all countries or in all sectors in the same way. But the fact that diversities exist within this great harmony does not mean that we are facing a significant heterogeneity. There is a very strong move towards isomorphism, and that is manifested in education. The answers at the local level are always diverse, and they will always be... And why? There are no mechanical impacts: States respond on the basis of their material conditions, and the understanding of new ideas and practices on the part of those adopting policies, as well as the historical context, also have an influence. There are several other specific reasons but I want to mention just three. One is local resistance: some people dislike certain initiatives, oppose them and use their individual or collective agency to reject the new proposals. There are also competency reasons: people, groups, governments having different projects but lacking the human or financial resources that are needed to materialize it; this impedes the adoption of new ideas or measures. And the third reason, that I would say is the most common local answer to global influences, are the superficial contagions that we often see, by which governments or groups – but particularly the former – follow initiatives that are being carried out in other countries, without the necessary reflection and thus doing it wrong or to a lesser extent.

The third observation I want to share is that globalization has multiple and complementary dimensions that are mutually reinforcing. We have seen their economic, cultural and political ones – such as the investment levels, changes in identities, issues around governance and participation of involved sectors. I would like to emphasize a key dimension in globalization that is the technological one. I don't see it as a bubble, but rather as an essential dimension that makes the time-space compression possible and thus influences the fast spread of ideas, the volume of these that circulate and the possibility to overcome geographical differences through electronic communications in a significant way. This technological question has its own identity and dynamics. If we make a historical comparison with former processes of change, what the current globalization contributes in a special manner is that we are speaking of previously unheard of technologies that, unlike technologies that used to be unilateral, are now bilateral forms, two-way communication, that also introduce several combinations to enter cyber space – in real or virtual time – creating a turmoil of possibilities related to all kinds of decisions and effects.

Now I will speak of what the title of my presentation announces, and basically I will cover five topics: 1) The implications of globalization in its neoliberal form for education; 2) The situation of education in Latin America, to explain how we are faring in comparison with other countries and regions of the world. (I believe that to move beyond our own perception, that is often mistaken and limited, it is indispensable to carry out a comparative analysis and then to discuss how the pressure of globalization effectively intervenes in education and gender issues). 3) The connection between gender and education in the Latin American region. 4) Education policies related to gender. And, finally, 5) Technological contributions to education.

1. NEOLIBERALISM IN EDUCATION

As already observed, globalization is a phenomenon of multiple dimensions and neoliberalism – as the Portuguese sociologist Santos, among others, points out –may be its strongest component because it becomes evident in many decisions that we make and, let us not forget it, this strong drive for more production, more distribution and more consumption, logically has to be accompanied by changes in the minds, in the ways of seeing the world. Neoliberalism helps in creating new identities; its force is strongly felt in social policies and particularly in education.

When we speak of neoliberalism in education, we need to highlight its political, economic and technical-administrative aspects. *What is happening at the political level?* A first feature is the idea that the desirable State must be the smallest possible, just enough to conduct a certain level of monitoring and control over the educational system, spreads throughout society. New rules of the game emerge, but less than are needed to combat the inequality and social discrimination that are still evident. Also, social expenditure – including education budgets – starts to be understood as an economic problem, that is, as a financial burden more than a social investment. It is not seen as a key investment to keep society harmonized and working for a common project. And because the budget assigned to education decreases, the idea is that the market must contribute to education, through private supply, that is by increasing the number of private schools and universities. As an ideological component of globalization, neoliberalism tends to identify organized teachers as a sector that is opposing change. This is how the strong current schools of thought that are in favour of eliminating teachers unions emerge, seeking to destroy a force capable of challenging the privatization of education and also to eliminate salary claims on the part of teachers.

At the *economic level*, I must say that what is noted in Latin America is different from what is happening in Africa and in Asia. Neoliberalism transfers the costs of knowledge and learning to the students, the prevailing logic being that as students are the direct beneficiaries, they must pay for their education. The practice of paid educational services in Africa is terrible, because it is demanded from primary school and then many girls and boys might miss school altogether. In that region, many schools are being created by small NGOs; in some countries, these schools concentrate up to 25% of the total primary school enrolment. Even though the demand is met, the quality is low. In Latin America, paid education tends to start at the secondary level. A more debated process can be observed around the expenditures at the University level, which means that access to State universities is not considered a constitutional right but just one more service for which users must pay. In Asia – a huge and widely diverse continent – primary schools have started to incorporate fees. This is remarkably the case of China, that has quickly moved from socialism (and an assumed humanism) to an aggressive version of capitalism. In the Asian region there have been huge quantum leaps in tertiary education, where the private sector is very prevalent. Besides, neoliberalism introduces the logic of economic competition in education. An expression of this are the bonuses for teacher performance, that have generally failed because teachers identify themselves as professionals and thus refuse to have their performance determined by the number of bonuses they might receive or to create hierarchies among themselves. This is a universal issue, because even though bonuses are frequently mentioned in governmental recommendations, they have been rejected by teachers, even in the USA.

The ideas of decentralization and privatization of education are circulating quite strongly. Even though it can be argued that in education the best decisions are those taken at the local level, involving parents and the community, it is also thought that with decentralization most funding will come from the local governments, favouring a decrease in the proportion of funding coming from the (national) State. In Latin America, privatization is happening strongly at the University level and what we are noticing is that these efforts of economic globalization seem to be democratizing education, as many more people can access the university system – the highest level one that, as such, provides greater rewards than primary or secondary school – but, on the other hand, a serious fragmentation of the university system has also been noticed, with the result that even though now there are more universities than before, that does not mean that the leadership of the most prestigious institutions has been modified or that students from economically marginalized or rural backgrounds can equally benefit from a university degree, as they might have graduated from universities with limited quality and recognition.

In relation to the *technical-administrative* aspects, there are several arguments, but they are usually embodied in official discourses without a serious intention to implement them. Decentralization is favoured – considered as a mechanism that will enhance decision-making – because the locality always knows its own problems better than the national Ministry, parents are able to participate in decisions and monitor teachers. There is a whole internal logic in these arguments that makes sense. The fact is that if the goal is to introduce changes in school governance but they are not accompanied by training for parents or teachers, school principals and the allocation of enough economic resources to carry out the investments required for a positive change, nothing will go beyond words. In the Latin American context, the tradition of communities participating in educational work has always been very limited. To create a new culture, that could be better than the one we have, implies undertaking a series of efforts that have not yet been undertaken as its importance would deserve.

There are also talks about administration as an engine for the improvement of education; that is, the idea is improving the quality of education but all these changes are always peripheral, usually involving the school principal and the community but seldom reaching the classroom. Maybe this happens because the recommendations in this regard are formulated by economists and not by experts in education. The former tend to see education as a more administrative (efficiency) than pedagogical (contents and interaction between students and teachers) process.

And, as my last point, in spite of the concerns about students' learning, I would say that these concerns can be found in many official documents but it is also a symbolic manifestation of our wish for students to learn more. Is this objectionable? Very few people would oppose improvement in school performance, an increase in the knowledge that students acquire. But if we take this seriously, we not only need to measure the end results but also to provide the required inputs and analyze the relevant process that would lead to the desired outcomes. In other words: in policies and practices, there are increased efforts to conduct evaluations (even at the national level) of the students' cognitive performance. Measuring outcomes is emphasized, but not enough attention is paid to the preceding conditions.

It is worthwhile to identify the consequences of those ideological changes that have been indirectly affecting education. Due to the individualist ethics and the economic crisis, the women's movement has been undermining itself in the last two decades, either because activists try to survive by taking demanding jobs or because of the adoption of new ideas, such as the promotions based on individual merit. At the same time, the information

and communications technologies have widely expanded women's informal learning and helped to create transnational networks. Today there is a greater international mobilization on the part of women, but less visibility at the national level. This means that teachers, most of whom are women, are not paid accordingly to the social work they do and thus, the best students are not interested in the teaching profession.

1.1 Methods for the spreading of liberalism

A question that must have certainly come to your mind, is how these ideas, this way of seeing the world, of analyzing how education functions or should function , are reflected in education plans. There are several explications. The fact that through the fast and speedy means of communication that we have, an unprecedented process for the circulation of ideas is taking place can hardly be argued against: something happens in China and we know it as soon as we connect to the Internet, wherever in the world we might be, using the information searches we can get a lot. With the technologies for transportation, now people travel much more, visit other places, etc. The circulation of ideas has clearly increased and the dynamic is that as soon as an idea that seems to be good is presented, there is a great eagerness to mimic and adopt it. What we know is happening in other sectors also has an influence; ideas like those that decentralization are good, the participation of the school principal as an agent for change is important or there should be more privatization, are not only ideas in circulation but also conditions for the international aid agencies to grant loans. And international agencies are very skilled in hiding these conditions. If you look for the document by which a certain loan was granted, you will never find those conditions there. The recommendations that are hard to reject come out in informal dialogues and in the gradual socialization of our political and educational representatives.

Another tool through which the neoliberal ideas have increased a lot in the education area, have been the structural adjustment measures, that have been useful to introduce new promises of improvement but more than everything to generate a reduced investment in education. For a country to pay its foreign debt, its national budget must allocate a good amount to debt redemption. In the national context where wealth is scarce or tax collection systems are precarious, the State does not have enough funds and the amounts allocated to basic social services are reduced to their minimum expression. In many countries, structural adjustment has manifested itself mostly in the reduction of education and even health budgets. This is generally accepted because the richest

sectors educate their children in private schools and thus do not feel the effects of the budget contraction affecting public schools. In this context, it is not surprising that the percentage of the NGP invested in education has grown very slowly in the region: from 1.3% in the period 1990-92 to 1.7% for 1997-1999 (OREALC, 2008).

The term "structural adjustment" was so widely criticized, particularly in education, that international bodies – and particularly the World Bank – decided to eliminate it from their vocabulary. They no longer speak of "structural adjustment" but of "strategic programmes for poverty reduction". But the mechanisms for external intervention continue to exist, because to obtain a loan, a national plan must be elaborated, including education, health and all the other sectors. Such a plan must be approved by the International Monetary Fund before it can go to the World Bank or the Inter-American Development Bank. In other words: the mechanisms for influence and coercion persist.

In my last observation, I will refer to a phenomenon that will manifest itself in a very powerful way in the coming ten years, and so we must follow its evolution closely. The World Trade Organization brought about a complete breakdown of the idea that education is a common good. Education might have aspects of a common good, but it is mostly recognized as a commodity – like any other – apt to be sold and bought. The World Trade Organization introduces for the same time in trade agreements the issue of commodification of education. Now it is covering education at five levels, including informal, non-formal and adult education. As you can imagine, the best-seller at the international level will be higher education. So, the number of corporations, universities and private institutions selling educational services and creating universities in other countries, will show a marked increase. The more offered, the better, because those who cannot get into the public systems now have greater opportunities to enrol in these new universities. The problem here is that these commercial agreements also bring something that has been traditional in this kind of agreement: the clause of the most favoured country. What does it mean? Let us imagine an Australian institution wishing to open an affiliate in Peru; the Peruvian government has to treat it as it would a national university. Then, if the government encourages a programme for scholarships in national universities, those scholarships have also to be available in the Australian university active in the country. This means that eventually the national rights to implement public policies in higher education are to be limited. What also appears as a certain risk, even though we don't yet know how it will manifest itself, is that privatization as enforced through the World Trade Organization comes along with the identification of easily sellable fields of study. Informatics can be sold but Agronomy a bit less; Business Administration of course, but History is harder. In this way national needs get out of phase with what is

commercialized, what is sold and thus can be bought. And we already know that many of these new universities offer careers in disciplines and fields that are cheap, that do not demand serious investment in laboratories or infrastructure.

2. REGIONAL OVERVIEW IN EDUCATION

Comparing ourselves with other developing regions, Latin America is doing much better than others in relation to access to primary education. But, what does access mean? It is easy to measure but, as data, it is quite raw. Access is simply the enrolment at the beginning of the school year, it does not say anything about the experience at school or the academic success. For that we need other indicators. The rate of completion for primary school is very important. In this regard, Latin America shows a poor performance, particularly when the data are disaggregated by ethnicity, class or urban/rural place of residence. Data for the region at high school level are also weak, with school drop-out rates that are unacceptable for any country looking to develop its human resources.

A simple comparison across countries does not have much value, as there are many historical, geographical and political factors at play, but in any case let us try it. If we analyze the education statistics of 50 years ago – that is, of 1960 – secondary school completion for Asia was low, only 11%. In those years, Latin America had a completion rate of 7%; it was low, even lower than the Asian one, but compared to Asia it represented a 63% rate of completion. By the year 2000, the conclusion rate for Latin America had improved, reaching 18% but in Asia, the rate has had an important increase, reaching 48%. This means that the compared rate for Latin America – in relation to Asia – is now of 38%, which is a clear backward movement. Recent data reveals that a third of Latin Americans receive secondary education, but in South East Asia 8 of 10 students do so.

Part of the neoliberal current in Education pays serious attention to quality, defined as the student's academic learning. For that, many international tests for school performance are promoted. Latin American governments know very well that if they take part in those tests, their performance will be very weak, and also that this participation requires high budgets. The data we have from these international tests, in which few Latin American countries participate, show that the average performance is very bad. In one of those tests, known as TIMSS (Trends in International Mathematics and Science Study), measuring knowledge in mathematics and sciences, in 1995 Colombia – the only Latin American among the 39 countries participating in the TIMSS – ranked 38th in Mathematics for 6th year students. In

a later version of the same study (TIMSS 1999), Chile – the only Latin American country among 38 participants – ranked 35th for Mathematics in 8th year students (PREAL, 2001). The results of the PISA (Programme for International Student Assessment) test, designed to measure reading, mathematics and science skills, also reveal the poor performance of the average Latin American student. For instance, the Latin American countries taking part in this test (Argentina, Brazil and Colombia) ranked among the last due to the results obtained in scientific skills (U.S. Department of Education, 2006). On the basis of tests administered in a comparative study among Latin American countries, the only country showing a quality performance in mathematics and reading was Cuba. The other countries were very far down in the ranking, and it is not possible to identify clear patterns among them (LLECE, 2008).

Other issues strongly marking Latin American education are the great disparities in access, completion and academic performance between urban and rural areas, rich and poor communities, dominant and minority groups. This data is important because it reveals the advantages and disadvantages by income level, comparing state and private schools. This indicator is focused on the number of school attendance hours per year. The longer students remain at school, it is assumed that the number of teaching or learning hours also increases. There is no direct relationship between time and learning, but it is a reasonable assumption. In private Latin American schools, students enjoy an average of 1,000 hours of attendance, while in State schools they attend between 500 and 800 hours, that is between 50% and 80% less. The disparities in the conditions of learning between both types of schools also have to be taken into account.

Latin American governments' investment in education is very precarious, both for primary and secondary schools. The current average investment in European countries (according to the OECD) is the equivalent of US$ 6,400 per student per year, which is low compared to that of the USA, where the investment surpasses US$ 11,000 per year per student. Of course in industrialized countries income is higher and so is the expenditure. But what is happening in Latin America? The country that invests the most in education is Chile, with US$ 1,400 per student (PREAL, 2001), however it invests five times less than Europe and eight times less than the USA. The expenditures for most other countries in the region are very low and also the data is not very reliable; for instance, the OECD reports that Peru invests on average US$ 350 per year per student, but another source closer to that country's Ministry of Education indicates that the annual expenditures are of US$ 251 per student (Rivero, 2007).[2]

[2] It has been pointed out that, unlike other countries, Peru includes pensions in its education budget, resulting in an overestimation of investment in education. When the figures are disaggregated, it can be seen that 85% is devoted to salaries and pensions, 10% to goods and services (equipment, teaching materials) and 5% to capital expenses (buildings/infrastructure).

Krawczyk (2002) summarizes the state of education policies in the region as "... fragmented, contradictory, minimal, concrete policies that are also privatization-oriented" (translation ours). She also refers to the development model, pointing out that "Never before has the development model imprisoned to this extent the possibilities for transformation of education towards a more egalitarian society".

3. GENDER AND EDUCATION IN LATIN AMERICA

If the national totals for enrolment in primary and secondary school in Latin America are analyzed, no gender gaps can be observed. If we break down the figures to differentiate not only between girls and boys, but also between Indigenous or rural children and those who are not Indigenous or living in urban areas, then we can see that the condition of girls becomes dramatically worse. And this is not only because they live in a rural context in precarious conditions, but because in rural areas other aspects of the life experience of girls and young women come to light, like the sexual division of labour – imposed by patriarchal ideologies – according to which women must take care of domestic work and care for others. This phenomenon – accumulation of and interaction among several factors causing social disadvantage (for instance, class, ethnicity, gender, geographical location and race, among others) – is becoming very prominent now in gender research and not only in relation to education. Known as intersectionality, it does not only acknowledge the disadvantages due to gender but also gender in active and mutually enforcing combination with other social features.

In regard to the participation of men and women at the higher education level, we can see that Latin America is doing much better than other developing regions. The Latin American region has an average of 23% of women in university, while in other regions of the developing world the figure only reaches 10%. If we compare the percentages of male and female enrolment in the region, the difference favours women slightly: 23.5 against 21.5%. However, there is an ongoing trend in favour of women that is going to continue increasing. There are several explanations for this. One is that women reflect and learn – in one way or another – that when we join the labour force we find an additional discrimination, because for a woman to earn the same as a man, she needs to have had in average 4 more years of schooling. It is possible that women perceive investment in education as indispensable to be able to counter discrimination.

In terms of women's participation in the higher education sector in general, it must be observed that even though the number of women is constantly increasing, there has not been a consequent redistribution of fields of study and thus the gender clustering persists: some fields are predominantly female while others are markedly male. Now there are more women, minorities and older students accessing higher education than ever. Even though women constitute a certain majority in the universities, the system has not been democratized at the same time and continues to be stratified, with women and ethnic minorities overrepresented in low-prestige careers and institutions, and underrepresented in high-prestige positions and well-remunerated fields. Many sociological investigations affirm that one of the main reasons why women earn less than men is that women work in fields that are socially devalued and thus, where the salaries are lower. Then, one strategy to increase women's remuneration should be to start changing the selection of fields of study for both women and men.

4. GENDER RELATED EDUCATION POLICIES

A question of considerable importance in Latin America is that gender issues in education are perceived to be related only to access. As the enrolment rates per gender do not show any considerable gaps, the conclusion that is immediately reached is that there are no gender issues in the field of education for the region. And when the data is disaggregated by geographical location and ethnic groups, it is concluded that the disparities to be breached must be based on class and ethnicity, and not on gender.

In countries like Brazil and Mexico, some policies on Sexuality and Civic Education have been implemented to make changes in gender perspectives, but in most countries little or no attention is paid to the schools' hidden curricula, that is, to what is learnt through peer groups, observed in daily life at school through school practices or interactions among the adults there. What we know thanks to research studying gender in education practices is that inequalities in the classroom are not expressed through a lower educational performance by women. That is not where discrimination occurs; it is not that girls or young women perform more poorly or learn less. It rather functions in the creation of identities, masculine or feminine, affecting self-esteem and the perception of future life. In regard to self-esteem, young women feel less empowered to make decisions about their lives. It is not so much that the young woman feels inferior to the young man, but rather that she considers certain disciplines – and thus, certain occupations – as being not appropriate for her, not because they are too difficult but because they will

demand decisions or conditions that might come into conflict with family life or create tensions with her understanding of femininity.

As long as the messages that the school communicates to young women and men about femininity and masculinity are not challenged, and as long as knowledge and modes of action that are able to counteract the "normality" of school life are not provided, the school system will continue supporting the *status quo.*

4.1. Global and regional polices on education and gender

I will quickly move to review the two global education policies in existence: Education for All (EFA) and the Millenium Development Goals (MDGs). I must say that both these policies have originated from international governmental bodies for two reasons. The first is to put more pressure on governments to invest more in social sectors; and the second is to pressure on donor agencies to support more strongly the efforts of developing countries. EFA started in 1990 and was reiterated in 2000; the MDGs were launched few months later, also in 2000. EFA makes limited sense for Latin America, as one of its main goals is gender parity in primary education. It is true that a significant problem in completing primary school persists for minority groups and that there are still high illiteracy levels among the Indigenous and Afro-Descendant populations, but the most relevant struggle will be that for a greater and quick increase of secondary education. Given the levels of urbanization and industrialization of Latin America, completing secondary school is a requirement for access to jobs to avoid reproducing poverty.

In terms of gender, EFA identifies as its fifth goal "Eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls' full and equal access to and achievement in basic education of good quality". Its goal number four aims at "achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women". Thus, it aims at improving the situation of adult women, as most illiterate persons are women. In the MDGs, goal number three maintains the objective of gender parity in education, but redefines primary education as four years of schooling, which implies a backward movement for several Latin American countries. Also, the MDGs redefine adulthood to encompass no longer the period from 15 years old to old age, but as a reduced age

group – those between 15 and 24 years old – that might provide some governments with an easy way out in terms of adult education so they can say, "My goals are just to attend to these groups and not to the entire population".

Another aspect that is being affected by the MDGs is early childhood education. EFA made serious efforts to include it and mentioned it as its number one goal. Many research studies have found that in order to improve the performance of the least-favoured social sectors, early childhood education is essential: the earlier that the introduction to cognitive, emotional and motor skills is provided, the more are the possibilities to fit in school and show good academic performances. Unfortunately, the MDGs make no reference to early childhood education.

In contrast with other regions of the world, Latin America has its own regional education project: the 2002-2017 Regional Education Project for Latin America and the Caribbean (OREALC, 2002). This project states that Latin American countries have decided to act at the secondary school level because it is there that their main weakness lies. It also speaks of reducing illiteracy. The document refers to *diversity*, but without defining it; there are also references to *equity*, again without any definition provided. It mentions the need to provide *citizenship education*, indicating that it could include human rights, civic virtues and responsibilities, as well as the creation of a friendly school where students feel welcome. The Regional Project speaks of taking into account social, cultural and individual diversity as key axes for curricula design and development, to achieve equity in the quality of learning. It adds that to that end, we should strengthen the inter-cultural dimension, the learning of native languages, and gender equality (OREALC, 2002, p.43).

Far from considering how to improve the conditions of work for teachers and the value that gender training could have for teachers, the document regrets the increasing predominance of female teachers, adding that "This is especially important when one considers that many households in the region lack a father figure, and the consequences this has on boys and on their identification with a masculine role" (OREALC, 2002, p. 45). In other words, it refers to gender merely to express its concern for the lack of masculine presence, implying that this is a weakness to be overcome. A follow-up meeting to the Regional Project held in 2007 shows the same gaps. Gender is scarcely mentioned, as the problems of repetition, access and completion grab all the attention (ECLAC, 2005).

Other strongly influential forces on educational policies at the regional level also pay very little attention to gender. A document on the state of education produced by the UNESCO Regional Office for Education in Latin America and the Caribbean (OREALC, 2008), indicates that the curricula must be adjusted in such a way that gender differences are explicitly taken into account, but a few pages later it affirms that "a small number of countries still show differences in detriment to females within a regional framework of parity or of a clear reversal of disparities. This means that it is increasingly common to find situations in which the male population appears to be at a disadvantage" (p.21). In this way, the document reduces the gender problem in education to access and dismisses the analysis of educational content and experiences.

Economic competition imposed by globalization and neoliberalism is leading to a reduction of what is considered knowledge, as knowledge is increasingly presented as perfomance in mathematics and reading. Other dimensions are not taken into account, and that means that the spaces we should use to encourage a wider recognition of differences, as well as to correct gender and other types of discriminations among youth, are non-existent or remain unused. The predominant attitude is a lack of concern to see the State act; the assumption is that the market, with its demand and supply forces, is enough to achieve positive social balance.

An assessment of the educational system at the Latin American level (PREAL, 2001) qualifies government actions for equity as "very bad". It is interesting to highlight that the rating is based on the fact that the quality of education hardly reaches poor, rural or Indigenous children; that is, the issue of gender is not considered an element of "equity". The PREAL evaluation points out that primary school completion is very low, as only between a quarter and half of all students reach the 5th year of primary school, but it also notes that in regard to gender equity, Latin American education is relatively good. Once again, the notion of gender equity is reduced to access.

5. TECHNOLOGICAL ELEMENTS IN EDUCATION

Here I will address what I consider the most positive aspect in the relation between globalization and education: through Internet and the search of data and knowledge using web search engines, possibilities to acquire more information are generated, as well as a larger amount of affinity networks. The infrastructure of information and communication

technologies in Latin America is very deficient. While in the USA, 50 out of every 100 persons use Internet, at best in Latin America those figures are 20 out of every 100 (UNDP, 2001). Besides, many schools lack electricity. In spite of that, many people who don't have their own computers, are able to obtain cheap services in the Internet cabins proliferating in many neighbourhoods in big and small cities. Latin America is creative: it seems that just anybody can open a garage, install a few computers there and get a large number of children and young people to come often and use them. This phenomenon is amazing: I have seen nothing like it in other regions.

Social movements in particular have been nourished by communication and network formation. A very positive aspect of these processes is the greater spread of ideas like democratization, human rights and empowerment. It is not that these ideas are immediately put into practice, but to the extent they are spread, they contribute to create more assertive identities. There is no doubt that social movements led by women have benefited from communication and information technologies. One of my observations is that information and communication technologies have a great potential, both for non-formal and for informal education. There is informal learning because people can do more self-teaching. The strictly educational use of computers in Latin American schools is low and very unequal. Definitively there is no comparison between the rural and urban areas, and even less between public and private schools, even though there are always exceptions. In distance learning – and here we are mostly referring to adult education, including university – long distance, virtual and hybrid courses (combining virtual and on-site learning) are promoting the participation of non-traditional students, those who are older, working, with children at home and those for whom going out is harder. This is something that will benefit women to a great extent.

And what about gender? Let's make a summary. There are advances: a trend towards parity in access, greater participation of women in universities, greater participation of women in public and professional positions, less weight of the ideologies by which motherhood and care for the home are the exclusive responsibility of women. Among the young, there seems to be less *machismo* than before, and more freedom on sexual issues. These are gender changes, global changes and it is not clear to me to what extent education was involved in them. It seems that the spread of ideas and means of communication have had a greater influence than school has.

A key weakness in terms of gender is that in the field of education – among the policy decision-makers at the global, regional and national levels – the ideological question

is not acknowledged. In other words, there is no recognition that gender is a social construction that is played out every day. That is why formal education appears as neutral – that is, the same for female and male students – and thus there is no perceived need to work *within* it. The gender concerns are restricted to access and completion indicators. Even if now the notion of "empowerment" is included, it is linked to outcomes such as the presence of women in paid jobs and in management or political roles, but education is not linked to processes that are internal to schools and classrooms and that facilitate those trajectories. Social movements are in favour of education but they usually have in mind the education of adult women – that is, indeed, crucial – leaving aside formal education that affects the bulk of the new generations. In Latin America, few feminist social movements challenge formal education. One of them is the *Red de Educación entre Mujeres* (Network of Education between Women, REPEM), a coalition of 300 NGOs, that includes among its goals the creation of non-sexist education. Apart from REPEM, a concern about gender as an ideology in education is hard to find among political parties and intellectuals. My conclusion is that gender in education is an orphaned problem: nobody sponsors it and the few who do it are very weak.

6. EDUCATION WITH OR WITHOUT GLOBALIZATION

Latin America contains societies with severe inequalities; with or without globalization, some Latin American countries continue to be racist and excluding (Telles, 2007). In the previous presentations we could see how the gaps in salaries of men and women of the same age and educational level reach 17% in the region. The same IDB (Inter-American Development Bank) mentions that the ethnicity gap – that is, between Afro-Descendants and Indigenous peoples as compared to the white population) reaches 28%. This shows the need to still work a lot on the different social markers and a first conclusion that could be considered is that we face *internal* challenges, not only external challenges such as globalization.

The countries with the highest levels of exclusion based on ethnicity are Guatemala, Peru and Brazil. In recent years, Bolivia and Ecuador have made remarkable progress in terms of their Indigenous populations. Even Brazil now has affirmative action policies at the higher education level, and has developed educational materials for primary and secondary school recognizing the importance of the country's minority, speaking of the African presence in Brazilian society. Also, the education authorities in Brazil stop

the circulation of materials reinforcing ethnic, racial and gender stereotypes, bias and stigma. Besides these remarkable efforts, little change in terms of gender relations in the curricula can be observed in other countries. Very little is perceived in the training programmes for teachers and also little is done with active teachers (Stromquist, 2006).

In the Latin American region there is also a limited consensus on a nation-state project. With the exception of Chile, little national consensus can be observed, beyond the loyalty towards a particular political party or the growing presence of respected and well-functioning institutions.

I want to end on a positive note and share with you my recommendations. What would the possible areas for action be? As education overlaps with a broader problem, I can't see how the solution could lie within education: it must be a solution addressing a more holistic social level. A very efficient way of envisioning a decrease in gender-related problems could be to advocate for a 5th World Conference on Women. It should have been held in 2005, but it did not happen. We moved from a participation of more than 50,000 NGO women in the 4th World Conference on Women that took place in Beijing in 1995 to a small meeting – attended by invitation only – that took place in New York on the 10th anniversary of the Platform for Action launched in Beijing, with the participation of 5,000 NGO women.

There happened what usually does at international conferences: the great exchange of ideas, the introduction of efficient models for new social constructions, the envisioning of new roles and actors were reduced. I believe that a new world conference could be one of the most powerful strategies, because when these conferences are organized everyone wants to look good: governments invest in financing projects so they can submit reports on the work they have done; international agencies also want to show off and hurry to support a number of initiatives; women-led NGOs have the opportunity to showcase their efforts and nourish themselves with the efforts of others. A series of dynamics at all levels is created, which in turn increases international support.

Those of us working in education know that human beings *change* when they acquire more knowledge. Education has an impact and this is why there is a need to train political and education authorities at the national level on theoretical, political and practical aspects of gender in the social context and particularly in education. This training must be done in parallel with what many countries have already been doing, that is training women's movements that are and will always be the actors that are most committed to change in gender relations.

REFERENCES

ECLAC. 2005. *Investing better in order to invest more. Finance and management of education in Latin America and the Caribbean.* ECLAC, Santiago de Chile.

HELD, David; MCGREW, Anthony; GOLDBLATT, David and PERRATON, Jonathan. 1999. *Global Transformations. Politics, Economics and Culture*. Stanford University Press, Stanford.

KRAWCZYK, Nora. 2002. "La reforma educativa desde la perspectiva de los organismos multilaterales". *Revista Mexicana de Investigación Educativa*, 17(15): 627-663.

LLECE. 2008. *Segundo estudio regional comparativo y explicativo. Los aprendizajes de los estudiantes de América Latina y el Caribe.* Laboratorio Latinoamericano de Evaluación de la Calidad de la Educación, Oficina Regional de Educación para América Latina y el Caribe. Santiago de Chile.

OREALC. 2002. *Regional Education Project for Latin America and the Caribbean, 2002-2017.* UNESCO Office. Santiago de Chile.

———————— 2008. *The state of education in Latin America and the Caribbean, guaranteeing quality education for all.* UNESCO Office. Santiago de Chile.

PREAL. 2001. *Quedándonos atrás. Informe de la Comisión Internacional Sobre Educación, Equidad y Competitividad Económica en América Latina y el Caribe*. Programa de Promoción de la Reforma Educativa de América Latina y el Caribe. Santiago de Chile.

RIVERO, José. 2007. *Educación, docencia y clase política en el Perú*. TAREA, Lima.

STROMQUIST, Nelly P. (ed.). 2006. *La construcción del género en las políticas públicas. Perspectivas comparadas desde América Latina.* Instituto de Estudios Peruanos. Lima.

TELLES, Edward. 2007. "Race and Ethnicity and Latin America's United Nations Millennium Development Goals." Paper CPPR-048-07. California Center for Population Research, University of California. Los Angeles.

UNDP. 2001. *Human Development Report 2001: Making New Technologies Work for Human Development*. United Nations Development Programme. New York.

U.S. Department of Education. 2006. *Highlights from PISA 2006. Performance of U.S. 15-Year Old Students in Science and Mathematics Literacy in an International Context.* National Center for Education Statistics, U.S. Department of Education. Washington, D.C.

SECTION 3

Migration: Its Magnitude and Possible Roads Towards Its Interpretation

1. HUMAN MOBILITY IN ECUADOR AND THE SITUATION OF WOMEN

María Gardenia Chávez[1]

Human mobility or migration is a complex, fascinating, conflictive and contradictory issue. Running the risk of simplifying this *emerging field* of knowledge and action, I will divide this presentation into five parts: **1.** General aspects about understanding human mobility; **2.** A few features of migrations at the global level**; 3.** Human mobility and human rights; **4.** The case of Ecuador; and **5.** A brief overview of some future challenges.

1. GENERAL ASPECTS

Why speak of human mobility? The importance of language is well known, as the implications vary according to the way in which something is said or not said. It is worth highlighting that omissions are very expressive; the question is to learn how to place, listen and interpret them. This is why women push for speaking on a daily level in such a way that both women and men are visible in our discourse. We create different processes according to the way in which we speak about things.

Something so obvious, that sometimes tends to be overlooked precisely for that reason, is that mobility is intrinsic to being human. We have feet, not roots, and we have been moving from one place to another throughout our lives. We cannot even imagine understanding the history of humanity without the history of mobility, of people moving

[1] Anthropologist from Universidad Politécnica Salesiana de Quito, with post-graduate studies in Social Sciences, specializing in Human Rights and Democratic Security, at Facultad Latinoamericana de Ciencias Sociales, Quito.

She has an M.A. in Latin American Studies, specializing in Cultural Policies from Universidad Andina Simón Bolívar, Quito (UASB-E). She teaches at the Andean Human Rights Program - UASB, Ecuador.

She is a member of CLADEM Ecuador.

from one place to another. Such an evident fact has been forgotten in recent years, and now it is believed that migrations are a problem and our duty is to remain where we were born or where we usually reside.

Realizing that mobility is intrinsic to humanity allows us to speak of humanity's "nomadic roots", even though this expression seems contradictory when the word "roots" alludes to a fixed, unmovable hold. But if we think of having roots as something that infuses us with meaning, then it is relevant to speak of nomadic roots.

The first great epoch of mobility took place in the Paleolithic era, and that made it possible for the entire planet to be populated. We could say that was the pre-history of globalization, as thanks to the mobility of the peoples of those times, human population inhabited the entire planet Earth. Another important moment was the emergence of city-States. When cities were formed, a significant change occurred in peoples' mobility, from the countryside to the city, from rural to urban spaces. A third moment came during the Modern Age, and included several epochs and forms of mobility. Now, we are in a very special moment, marked by globalization.

Mobility processes originated from multiple causes and are manifested in several ways; they constitute complex facts and experiences that are historically configured. Thus, in order to understand human mobility, it is necessary to understand historical processes and contexts, taking into account the interrelation of political, economic, cultural and environmental aspects. That is, migrations or human mobility are complex facts, deserving more study.

These processes involve individuals, collectives, groups, families, as well as societies as a whole. Governments try to regulate these dynamics that are foreign to them. Human mobility is a dynamic that emerges from outside the sphere of the State and what States do is to attempt to "regulate" it, usually without taking into account that it has to do with something as intrinsic and owned by humanity as to go from one place to the other, and how that going from one place to the other reconfigures the conditions in which life is reproduced on a daily level.

In short, human mobility refers to historically configured processes/experiences, that include political, cultural, economic and environmental dimensions, involving humanity in all its diversity and expressing regular changes of "residence". That is, human mobility refers to absolutely all the ways in which individuals or groups move from one place to another.

Using the term "human mobility" instead of "migrations" is a political choice, as the latter has different implications nowadays. It is good to keep in mind that when typologies are built, they incorporate a variety of criteria that help in classification; in the case of mobility, we will consider in which directions people move, for how long, under which conditions and norms, among other features.

Prevalent understandings about migrations

Because migration is the movement from one place to another, it is synonymous with human mobility. But if we analyse its contextualized use, migration is heavily weighted in another direction. For the International Organization on Migration (IOM), migration implies crossing an international border and is determined by economic causes. In the academic world, the prevalent trends explain migrations from the perspective of labour dynamics, and particularly differences in wages and the supply/demand of work. Individuals moving are not seen as persons in a holistic sense but as a workforce, typically as low-skilled workers. This bias in analyzing migrations contributes little to understanding them as complex processes, multicausal and multidimensional, whose analysis requires inter-disciplinary efforts. Even though now there are several studies on migration networks and chains aimed at highlighting the agenda of migrating individuals, these efforts are only initial steps.

Other forms of mobility are refuge and asylum, two types in which the prevailing feature is the forced nature of the individual decision to leave her/his usual habitat, leaving cultural, economic and environmental factors at a secondary level, as attention is concentrated on the political or military conflicts. This is precisely why the emphasis in cases of refugees is humanitarian, while in asylum it is political. These aspects are not usually associated with migrants.

On the other hand, research and also advocacy around internal migration are relegated almost to oblivion, and the prevalence of economic perspectives persists. Forced displacement refers to movements within a particular country, originating in causes that force people to displace themselves. Those causes tend to be political, related to conflicts, or natural or anthropogenic disasters.

International norms present a rigid classification that is also common in domestic legislation, differentiating between migrants and non-migrants. The types of visas that are

granted are also part of this logic. A tourist is not considered a migrant (precisely because of the importance assigned to the labour component); someone who goes to another country for studying, even if she/he lives for five years in her/his country of destination, continues to be a student and not a migrant. A diplomat is even more unlikely to be considered a migrant. The stereotype of "the migrant", and particularly the immigrant, is that of a poor worker leaving a marginalized country and travelling to other places to improve her or his economic status. At the legal level, this division embodies and reproduces the stigma.

In relation to time, migration is defined as temporal, permanent, seasonal and definitive, keeping in mind that it is very hard to establish the time parameters for each case. For instance, a seasonal migration can become permanent if it is constantly reiterated. Even more so: if we take into account that the dynamics of mobility are highly dependent on several factors, a migration that is intended to be definitive can become temporary, and vice versa.

Other forms of migration, or situations in which migration takes place, are also mentioned: cross-border, regional, transcontinental migration, or that of persons in need of international protection, in a terminology originating within a human rights framework.

In these times of financial and economic crises in several destination countries, it is urgent to start discussing return processes. For persons who have spent considerable time away from their country of origin, this is a new situation in which they are facing cultural, economic, political and environmental changes.

Transit is another form of mobility and it refers to the brief passage of mobile individuals through a place, on their way to their planned destination. However, if we consider that in Africa, sometimes it takes years to cross the continent from South to North to then try to enter into Europe, can we say it is a case of transit? Can someone be in transit for 10 or 15 years? This shows how relative some terms are. In Latin America there are also important situations of transit.

Related problems

There are serious related problems linked to human mobility and the conditions under which mobility takes place: trafficking in persons or migrants. It is impossible to avoid addressing these crimes when discussing human mobility.

As we have seen, conceptually, politically and ethically, it is more proper to refer to "persons in mobility" than to "migrants" or "immigrants", in an effort to avoid reproducing conceptual fragmentation and to counteract the stigma contained in the latter terms, and their economic essentialism or determinism. You might have seen already, or will soon see, that in several studies the descendants of migrants – already born in the countries of destination – are called second or third generation migrants, as if the fact, experience or status of migration/migrant were something essential and hereditary. Along the same lines, it is better to speak of "persons in situations of refuge, displacement, migration or mobility", to refer to the set of dynamics or to the issue in a general way.

On multicausality

In general, to refer to the causes of mobility, a variety of emphases that lead to bias, fragmentation, and stereotypes are used, that result in very worrying trends. It is understood that people only engage in tourism, without any cultural or economic exchange, placing tourism at an abstract level. When it is said that people are going to work, it is assumed that those involved are either low-skilled workers or "brains" being "drained". Business travellers are hidden but also positioned in a different category, as if their activities were not of an economic nature. When referring to persons travelling for health reasons, nothing is said of cultural, communication or environmental factors, and even less about the economic organization of health. In a similar way, the situation of those travelling for academic purposes but who are actually looking for protection, is not addressed. Little is said of the complex economic dynamic generating conflicts or wars, or about the fact that when a person is displaced by conflict, she or he also has in mind the possibility of improving her or his economic status. Family reunification processes are also considered independent of cultural, economic and other factors.

All these emphases become fragments that do not allow for a holistic understanding of the plurality of causes behind human mobility. The reasons for displacement are as many as the persons displacing themselves. There is a need to rethink the best way of understanding and explaining the matter of causes and the way in which we address them.

There is another generalization that expresses this too: that labour migration has to be stopped, that persons should not migrate, except temporarily. This is why the emphasis is placed on the reasons for departure, that are usually economic, to influence them and

stop individuals from leaving. The migratory policies of Northern countries are much influenced by these notions. It is important to identify the causes of forced migration, as they attack the principle of free mobility and must be addressed so those who were forced to leave their places of residence are able to return to their living spaces. In the end, the multiplicity of reasons becomes interwoven.

Here where there appears to be only one reason at play, for instance, the economic one, there are other motivations. It is argued that people want a higher income, but it is not only that; that they want a certain type of life, but it is not only that; that they want to try their luck, but it is not only that. There are several reasons at play. There is a complex construction of reasons, where what is contingent intersects the contexts and the changes in it.

2. HUMAN MOBILITY TRENDS UNDER GLOBALIZATION

In spite of the fact that there are as many reasons as persons in situation of mobility, even if they are millions, certain worrying trends emerge. One of them has to do with the deepening and polarization of economic contradictions, as part of the current phase of the capitalist system, that are also expressed and configure individual mobility. The free circulation of goods prevails over the circulation of persons; the freedom of those who can migrate prevails on that of those who are not able to do so, that is, the majority. Here the scheme according to which it is the poor, the most affected, who change places is not necessarily so, because resources are needed for circulating and those who circulate are those who are able to generate resources or already have a minimum of these. The criteria of selectivity are what prevail and rule the world, and not the rights of persons.

Another trend in mobility under globalization is the one expressed in the directionality of the flows: from “poor”, “under-developed”, “backward” places – countries or areas – to those that are considered better. “Poor” is not an adequate term here, as it hides background issues; class and gender contradictions, exclusion, etc. The development logic is strongly integrated into our subjectivity. That is why most people aspire to “progress”, considering it means to be in a better position; development is understood as going from less to more. In a general sense, migratory dynamics follow this same logic: from something considered to be “less” to something considered to be “more”.

A third strong trend worldwide is the increase in xenophobia, a specific form of discrimination based on the status of being a foreigner, and associated with other types of discrimination that originate in class, sex, religion, and ethnicity, among others.

To each of the above trends must be added the issue of securitization[2] of migrations or human mobility; that is, to extend the notion of State security based on external threats issued by an enemy from which the State must protect itself. This means that the foreigner, the irregular migrant, becomes a threat or a danger from which the State must protect itself.

In the field of international migration studies, the perspectives and studies are mostly determined by the interests of the North, ruled by the notion that people should migrate as workforce, remain temporarily and adjust to the conditions determined by the countries of destination. Policies are geared towards reaching agreements with countries of origin to set quotas for workers who will travel in a regularized way, under the principle of selectivity, and will not settle permanently. In short: to work, be useful and then return to their countries of origin. Also, countries of origin must implement development programmes so people will not migrate with the aspiration to settle in the countries of destination. This allows us to understand why the largest portion of international support goes to return programmes and that the link between migration and development is one of the strongest issues and programmes.

In this context, there is a need to update the series of current criticisms of development and reflect on other notions like de-development or life horizon, and not to see them as a confusing matter.

A few figures on mobility

Taking into account that there are several limitations making it hard to get statistical information on the different forms of human mobility, the Human Development Report

[2] Securitization is a trend in the field of international relations that emerged in the late 90s, and is based on broadening the political-military security analysis to other issues. Thus, the securitization of migrations refers to treating this issue as a threat for the survival of States, and implies setting priorities in national or international agendas, managing responsible institutions and adopting migration measures from that political-military perspective. Migration is criminalized; emergency or special measures are introduced; the idea of migration as a threat is spread in society, and responses to that are institutionalized. All of this contravenes human rights.

2009,[3] contributes valuable data regarding mobility in the global context. The figures presented below are taken from that report.

Internal migration is larger than its international counterpart. There are an estimated 740 million persons who move within the borders of their own country; almost four times as many as those who have moved internationally. At least 26 million of them (3.5%) are in a situation of forced displacement. It is worth mentioning that temporary migration has not been documented here.

Three per cent of the world's population – around 200 million persons – migrate to other countries and this has changed little in a century; what has changed significantly is the context, around the dynamics and reactions. That is: what has changed is who migrates, under which situations and how. Out of those persons living outside their countries of origin:

- At least 14 millions are refugees, most of them coming from the poorest countries.
- Sixty per cent of migration takes places between countries that are similar in development; people usually migrate between developing and between developed countries. However, when data is disaggregated, the logic of going from less to more holds; for instance, people go from Ecuador to Chile – even though both countries are in the same region, there are substantial differences among them in terms of human development levels.
- Thirty-seven per cent of migration is to developed countries and at least 1/3 is in irregular conditions, while only 3% of migration is geared towards non-developed countries.
- Fifty per cent of migration takes place within the regions of origin, and 40% across neighbouring countries.
- Out of 10 persons, 6 choose countries with a religion similar to theirs, which indicates that religion is one of the reference points at the time of making a decision.
- Four out of 10 persons go to a place where they can speak their mother tongue.
- A very important figure: 48% of those in mobility are women, and this represents an increase of only 10% from the 60s. This is important, because it was thought that the feminization of migrations was a phenomenon of the 80s. We need to remember that women have always migrated.

[3] United Nations Development Program, *Human Development Report 2009. Overcoming barriers: human mobility and development.* UNDP, 2009, at: http://hdr.undp.org/en/reports/global/hdr2009/

Other aspects that are typical of globalization: the thirteen countries from which most people migrate, are quite small and some of them have up to 40% of their population abroad. Forty-eight countries with up to 1,500,000 inhabitants have emigration rates of up to 18.4%.

The fact that only those who can afford to do so are mobile is confirmed: only 3% of the African population live in other countries, and of them only 1% live in Europe. This helps to breakdown some preconceptions, even though the information presented is still conservative regarding other forms of human mobility.

Latin America on the move

What is happening in Latin America? The same report by UNDP presents information on three forms of mobility: internal migration, emigration and immigration. For South American countries, we have the following data:

TABLE Nº 1

Country	% Internal Migration 1990-2005	Immigration 2010		% Emigration 2000-2002
High human development		# Persons	% Women	
Chile (44)	21,3	320 400	52,3	3,3
Argentina (49)	19,9	1 449 300	53,4	1,6
Uruguay (50)	24,1	79 900	54,5	7
Venezuela (58)	23,8	1 007 400	49.9	1,4
Brazil (75)	10,1	688 000	46,4	0,5
Colombia (77)	20,3	110 300	48,3	3,9
Peru (78)	22,4	37 600	52,4	2,7
Ecuador (80)	20,2	393 600	49,1	5,3
Middle human development				
Paraguay (101)	26,4	161 300	48,1	6,9
Bolivia (113)	15,2	145 800	48,1	4,3
Guyana (114)	-	11 600	46,5	33,5

Source: UNDP, *Human Development Report*, 2009
Table produced by Gardenia Chávez

As mentioned earlier, UNDP considers as internal migrants only those who have changed their residence in a permanent way; that means that the average 20% only includes those who were born in one place and live permanently in another. Mobility due to seasonal work and other dynamics taking place internally have not been taken into account. However, this means that approximately 1/5 of the population in our countries had moved in a permanent way, with all the implications this has.

On the issue of migration, the figures for 2010 are just projections, because they are expressed in numbers of persons and not in percentages. It reflects the human groups that have immigrated, and if we take into account the global trends, those are people who mostly do this in an irregular fashion, that is, those facing the most serious human rights violations.

There is a need to mention that these figures are low. For instance, in Ecuador, for the most recent decade, they reflect a migratory balance of more than 1 million persons, with the Colombian population making up the largest group, at least 500,000 people.

The figures for women are interesting. It is possible to see how those countries with the highest development level are the ones chosen by most women; the percentages of 52, 53 and 54% in female migration can be found in those Latin American countries with a higher development level than Bolivia, Guyana, Paraguay or Ecuador, that are placed at the lowest end.

In terms of emigration, percentages are also lower for Ecuador: the report indicates 5.3%, when other studies show that persons living abroad constitute 10% of the economically active population (EAP).

It is important to notice how in Latin America – a continent on the move – the percentage of women who migrate is high (approximately half) and reproduces the global logic at a lower scale: to move from countries offering less possibilities to those having better conditions of living. Even though the figures do not accurately reflect this reality, they allow us to see the trends.

3. HUMAN MOBILITY AND HUMAN RIGHTS

It is interesting to understand mobility from a human rights perspective. There is no margin for doubt: human mobility is a human right, related to two fundamental freedoms: the right to circulate and the right to choose residency. The Universal Declaration on Human Rights, in its Article 13, states:

> 1. Everyone has the right to freedom of movement and residence within the borders of each State. 2. Everyone has the right to leave any country, including his own, and to return to his country.

It is key to highlight that the Declaration mentions the right to "residence within the borders of each State", without saying that it should exclusively or necessarily be the State of origin or birth. The right to residence goes hand in hand with free circulation, because the fact that an individual or a group of people move from one place to another outside their country, implies they must fix their residence, regardless for how long they do it. There is no logical way to separate these two situations.

Article 14, refers to protection when migration is forced:

> 1. Everyone has the right to seek and to enjoy in other countries asylum from persecution. 2. This right may not be invoked in the case of prosecutions genuinely arising from non-political crimes or from acts contrary to the purposes and principles of the United Nations.

Article 15 is important because mobility is related to nation-building, from the perspective of the nation-State, a historical convention that – after 500 years of conquest – determines that Latin American peoples would be Ecuadorean, Peruvian, etc. Every person has the right to a nationality and the right to change nationalities:

> 1. Everyone has the right to a nationality. 2. No one shall be arbitrarily deprived of his nationality nor denied the right to change his nationality

Freedom to change nationality is important, as is the fact that nobody can be arbitrarily deprived of her or his nationality: these are fundamental rights applying to all persons.

There are two usually overlooked articles in the Universal Declaration that have become more relevant lately:

> Article 28: Everyone is entitled to a social and international order in which the rights and freedoms set forth in this Declaration can be fully realized.
> Article 30: Nothing in this Declaration may be interpreted as implying for any State, group or person any right to engage in any activity or to perform any act aimed at the destruction of any of the rights and freedoms set forth herein.

In a globalization context, these articles are tools to help build a more fair society for the exercise of all human rights. Persons have the right to live under an international order in which the rights and freedoms proclaimed in the Declaration become fully effective, without anything that can make restrictive interpretations of the consecrated rights or those tending to suppress them. This is the utopia! But the principle of selectivity that States always invoke and put forth, contradicts the content of the Declaration and the full enjoyment of human rights. This is a strong tension raising a challenge that must be overcome.

A specific instrument is the Convention on the Rights of Migrant Workers and their Family Members. Even though it represented a significant step forward and is an important tool for defending the rights of persons in situations of mobility, it also has a restricted perspective, as it continues to see persons as migrant workers. The significant step lies in its recognition of a core set of rights for all migrant workers, regardless of their migratory status at the same time that it acknowledges the link with their relatives.

On its part, CEDAW recognizes equality between women and men with regard to the right to freedom of movement and residence (Article 15), while the CEDAW Committee in its General Recommendation 26 (2008) En el original decía 2005 pero es 2008 on women migrant workers stated that,

> Although both men and women migrate, migration is not a gender-neutral phenomenon. The position of female migrants is different from that of male migrants in terms of legal migration channels, the sectors into which they migrate, the forms of abuse they suffer and the consequences thereof. To understand the specific ways in which women are impacted, female migration should be studied from the perspective of gender inequality, traditional female roles, a gendered labour market, the universal prevalence of gender-based violence and the worldwide feminization of poverty and labour migration. The integration of a gender perspective is,

> therefore, essential to the analysis of the position of female migrants and the development of policies to counter discrimination exploitation and abuse (Para.5)

The Recommendation sets out guidelines for the protection of migrant women's rights but only in the workplace, specifically for three categories of migrants:

> a) Women migrant workers who migrate independently;
>
> (b) Women migrant workers who join their spouses or other members of their families who are also workers;
>
> (c) Undocumented women migrant workers who may fall into any of the above categories.

Again we need to realize that it is not a coincidence that persons in situation of mobility, in this case women, are seen mainly as workers, as low-skilled labour.

Overall, it can be said that in spite of the importance allotted to the Human Rights International System's instruments, they address the diversity of processes involved in mobility in a limited way, including in incorporating, developing and deepening a gender analysis of human mobility.

State responsibility

The States have the global responsibility to ensure that every person inhabiting their territories enjoys effectively and fully her/his human rights, including that to human mobility. This is a fundamental statement and it is expressed in their responsibility to abstain from violating rights, to take all the necessary measures to ensure the fulfilment of those rights as well as those measures indispensable to promote and communicate all rights.

As has already been mentioned, States usually base their migration policies on selectivity criteria, conflicting with State affirmations and responsibilities with regard to human rights. The resulting tension is expressed in norms, policies and measures aimed at regulating and/or controlling migratory flows, usually assumed from a restrictive logic, when the preferred option would be to implement regulations and/or controls without undermining the rights of persons in situations of mobility and, in general, of all persons related to a migratory event.

As a right, migration implies that individuals have the needed guarantees so their options to migrate and the decision to do so, be as free as possible. Then, once the journey has begun, for it to be done in dignified and protected conditions, without any risks or threats. Once the person has arrived at her/his destination, the issue of living without being subjected to discrimination or exclusion will be an indicator of the fulfilment of rights for those who left but also for those who stayed. In the case of return, there are also actions aimed at guaranteeing the rights of returning persons; return must never be forced. Other aspects such as mobility-related crimes, as well as every situation that is directly or indirectly related to the field of mobility, must also be analyzed from a human rights perspective.

The key issue for understanding the right to migrate or to free mobility is that persons – both individuals and collectives – cannot be forced to stay in a particular place or to leave it. If a person chooses to leave her/his usual place of residence and/or birth, s/he must be able to do it, under proper conditions. From a different angle, if a person does not wish or plans to change residence, s/he must also have all the necessary guarantees to do so and, if a person must leave under exceptional circumstances, it is desirable that her/his departure takes place under protection and for the shortest possible time. The right to not have to migrate is part of free mobility.

In short, State responsibility is to guarantee people's welfare, to regulate entrances and departures – who comes in and who gets out, at the international and domestic levels – without this regulation turning into an annulment of rights because in that case the State would be violating human rights. The principle of progressive and non-regressive realization of rights must be taken into account.

An important element for reflection and action on the prevalence of rights is to consider the spectrum of diversities, including gender: rights cannot be realized if the specificities of persons or groups are not taken into account, with their ethnic/cultural affiliations, ages, classes, disabilities, religions, etc.

Human mobility and gender

Human rights and gender are indivisible, because women's rights are a critical tool to speak of their emancipation. The experience of mobility is a significant event in the life of societies, as it has implications for all the spheres that differ according to diverse

individual status. What is common or universal is the fact that mobility is intrinsic to being human, and what varies is what reflects human diversity.

Men are women experience migration in different ways. There are specific human rights violations against women in mobility, that are aggravated when mobility is forced or unsafe: internal displacement, refuge, clandestine migration because policies are restrictive, trafficking in persons, etc.

Some violations are exclusively linked to being women: rape and the use of women's bodies as part of violent confrontation, as goods in legal or illegal work, apart from specific threats and risks. It is important that all these factors are present and clear because these violations intersect with others related to class, ethnicity, culture and other diversities. Migration will be different if those women migrating are Indigenous, Afro-descendants, of low-income, disabled, heads of household, etc.

Women have always migrated. The feminization of migration – understood as the percentages of women in migration increasing, reaching parity with or surpassing those of men – is taking place in a context of feminization of labour and of poverty under globalization, which implies specific life conditions.

Women's experience of mobility – either leaving or staying, because when someone who is close to them leaves, migration also affects women – changes her relationship to herself; to her children, if she has them; to her partner, if she has one; to her family and friends; her work, including a paid job, if she has one. The migratory experience also changes or contributes to put into flux her notions about her body, aesthetics and nutrition; makes her interact with cultural patterns that are different from the ones that marked the relationship to her body in her place of birth and/or usual residence. The notions of motherhood and usually also of sexuality, also change. Migration affects all these aspects in different ways.

Gender relationships are modified as personal or collective status, experiences or choices become interrelated. Migration is not responsible for all of humanity's changes, and even less if we understand them in a negative sense. Migratory processes tend to be blamed for family disintegration, problematic behaviours of children, couple break-ups... everything.

All this is rather more dependent on social changes that are already in gestation and for which mobility can increase the impact of changes, make them more evident or attenuate their effects, even though it does not cause them directly and exclusively. It is worth asking: what kind of gender relations were there in the country of origin? What were the relationships between genders like during the journey? How are gender relationship played out in the country of destination? How far have women's awareness and practice of their rights and autonomy reached in the country of origin? All these questions are also valid for internal migration, whose logic of mobility is the same as for international migration. The life experience of migrating women, within or outside the country, is decisive.

From these interactions it is possible to analyze how migration influences gender relationships, and if the changes it generates are positive or negative, with all the gradations that might come up between these two poles. Some will argue that migration has allowed autonomy and empowerment; while for others, it has brought more subjection, exploitation, denial of rights, etc. There is a wide spectrum of experiences and testimonies from women about the changes in gender relationships in different directions, and generalizations do not contribute to a detailed analysis of it.

If the field of mobility is complex, the same applies to gender relationships. An interrelated analysis of migrations and gender requires the simultaneous study of women's and men's diversity, in national and international contexts, in structural as well as more subjective aspects. To see migration as a negative factor and women from a family perspective, without exercising their rights, as good producers of remittances (they send more money than men and also more regularly), and good credit payers, is taking an instrumental view of them, closer to the old understanding of women as workers for development projects rather than the idea of women as rights-bearers and of the incidence of gender relationships in the economy and in development models.

The key aspect is identifying in which ways gender relations change and how those changes contribute to women building and enjoying their broadened autonomy. For instance, to spot substantial differences in the changes among women who migrated *for others*, annulling their autonomy, and those who migrate *with others*, becoming more autonomous.

It is worth mentioning that the migratory project takes shape over time and in the course of the process different experiences can have a different influence on the same woman, sometimes affecting her autonomy and rights, and potentiating them at other times. A

historical perspective is needed, both at the personal level as well as in what pertains to migratory processes.

In short, there is a need to overcome reductions and simplifications; the vision of women as victims, as perpetrators, as villains when they leave without their children or as heroines leaving all kinds of obstacles behind. Personally, I believe that neither victims nor heroines contribute to change unequal gender relations and broaden autonomies.

4. THE CASE OF ECUADOR

Here are a few facts to reflect on in the case of Ecuador, with regard to internal mobility. The country has about 14 million inhabitants, 50.5% of them being women. From 1960 it has experienced a deep transformation in the relation between rural and urban areas. From being a rural country it became a predominantly urban country (more than 60%), concentrating its population in two cities: Guayaquil and Quito, that together contain 45% of the total population of Ecuador. In 2001, 51.2% of women lived in urban areas.

Internal mobility is very high and has a variety of motivations: this issue has been overlooked, as very few systematic studies have been produced in the period from 1980 to the present. According to the UNDP report, between 1980 and 2005, 20.2% of the population changed its place of residence in a permanent manner.

Forced displacement is also a scarcely addressed issue in the country. However, it is becoming more evident that it is not something precise or circumstantial. The factors causing this forced internal mobility are several and interrelated, including environmental disasters, extractive activities such as strip or open-cast mining, poverty, different forms of violence and insecurity, deterioration of all human rights, etc.

Even though several cases occur in specific areas, like the border with Colombia – where, as part of the Colombia Plan[4] aerial chemical fumigation to destroy coca plants has also had adverse health effects on people on the Colombian side – there are hints that displacements are taking place throughout the country and, as long as they remain invisible, there will be no protection for the affected persons and groups.

[4] N.T.: USA aid plan for Colombia, aimed at combating the production and distribution of illegal substances, that according to human rights organizations has also militarized the country (70% of the budget is devoted to the security forces).

In regards to *emigration*, there are two significant movements: one towards the USA, that is local-rural and male; and the other, national and mostly urban, with a higher percentage of women and diversified destinations, with Spain as the main country of destination. Emigration is a national concern, because of the 14 million of Ecuadoreans, about 3 million live in other countries. In Table 2 we show the evolution of migratory balances for the period 1998-2008:

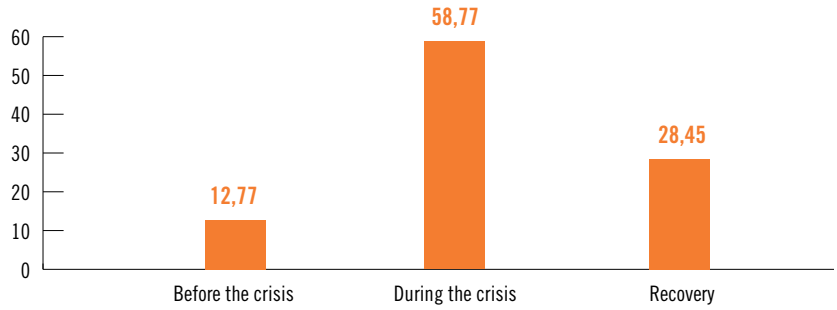
TABLE Nº 2 **MIGRATORY BALANCES 1998-2008**

Year	Nº	%
1998	-40 735	3,95
1999	-91 108	8,83
2000	-175 922	17,05
2001	-138 330	13,40
2002	-165 215	16,01
2003	-127 135	12,32
2004	-74 407	7,21
2005	-66 563	6,45
2006	-59 192	5,74
2007	-42 977	4,16
2008	-50 512	4,89
Total	-1 032 096	100

Source: Anuarios INEC
Table produced by Gardenia Chávez

It is worth mentioning that the 59% balance corresponds to the crisis faced by the country at the end of the 90s, caused by dollarization, financial crisis, natural disasters and other political and cultural factors. Here we can speak of a forced context at the economic level, an aspect that is usually not taken into account, as the emphasis is on linking the idea of "forced" to political or military causes, or natural disasters.

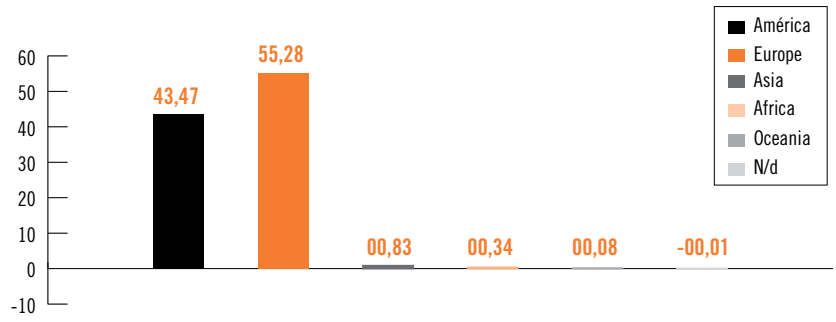
CHART Nº 1



Source: Anuarios INEC
Chart produced by: Gardenia Chávez

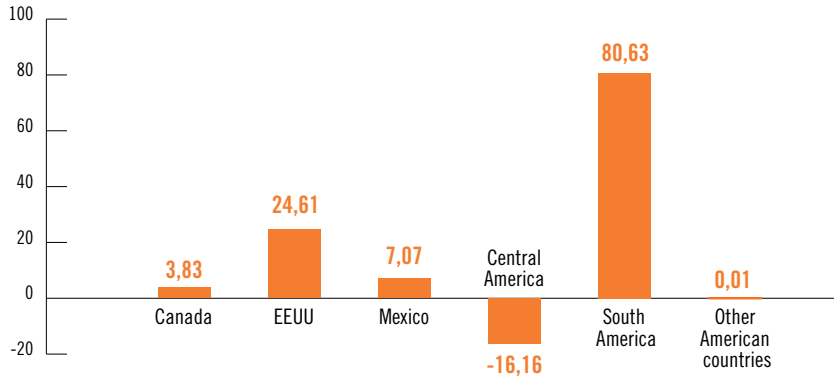
Charts Nº 2 and 3 show how the Ecuadorean population is spread through all the continents – America, Europe, Asia, Africa and Oceania – in small percentages but indicating the existence of a diversity of roads travelled and networks created. The largest percentages correspond to the American continent, followed by Europe.

CHART Nº 2



Within the American continent, migration towards the USA constitutes 24%, while 80% is aimed at South America. These figures are relative, because there is a negative balance in Central America, indicating irregular migration, considering that Central America is an area of transit and deportation of irregular migrants.

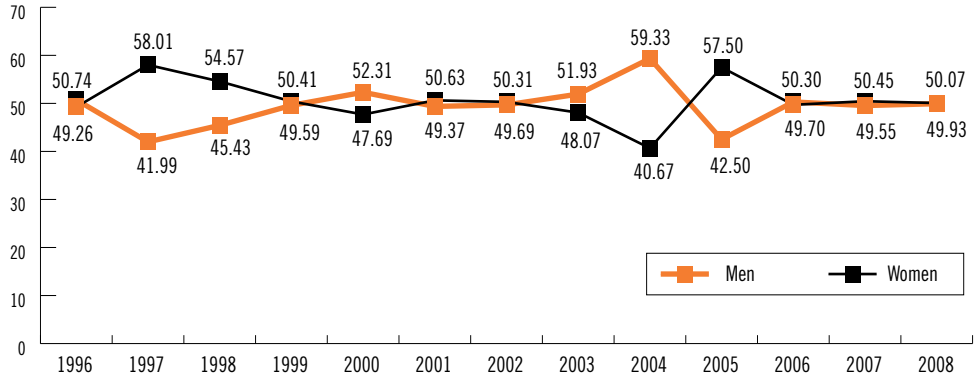
CHART Nº 3



Source: Anuarios INEC
Chart produced by Gardenia Chávez

In Chart Nº 4 below, it is possible to see the percentages of men and women who left the country in the period 1996-2008. What calls our attention here is the peak in women's emigration (higher than men's) that took place in 1997, before the crisis. In the period when the effects of the crisis were the strongest, women and men show almost equal percentage and in the period of recovery, after 2004-2005, women again constitute most of the emigrants. An inference could be made linking some women's behaviour regarding emigration to risks/security, but this topic requires to be analyzed in more depth.

CHART Nº 4



Source: Anuarios INEC
Produced by Gardenia Chávez

In terms of *immigration*, being a small and "less developed" country, Ecuador is home to persons coming from 150 countries, representing all continents. The largest contingents come from Colombia, Peru, USA, Spain and China. A growing Haitian immigration is worthy of attention, because it is unprecedented.

Just like for emigration, women's percentages are not very different from those of men's, and they show an increasing trend. In 1960, women constituted 45.5% of immigrants to Ecuador and by 2005 they had already reached 49.1% (UNDP Report).

Immigration is a controversial issue. It does not attract the same interest as emigration, but policies are restrictive, based on the selectivity criteria. Most immigration is regular and in the case of Colombians, it has been securitized. President Correa reintroduced the request of a police record certificate for Colombian immigrants, and increased the amount to be paid for apostilling this document along with the militarization of the Northern border.

To end this section, it is worth pointing out that a series of transformations related to human mobility have taken place in Ecuador: remittances are the second most important source of revenue; for the first time in history, the Constitution passed in 2008 devotes

more than 50 articles to this issue, along with many notions and terms used in the emerging field of human mobility, opening an important path for other Constitutions. There are some local ordinances – the first one passed by the Quito Metropolitan District, then by Cuenca, and others are in the making – State institutions are slowly making advances in dealing with this issue.

In Ecuador, the issue of human mobility has gained space: it is already in the Constitution and progress has also been made in the ways of understanding and acting on the issue.

5. CHALLENGES

A few critical situations to understand global mobility:

a. Globalization and polarization of the contradictions mentioned at the beginning of this presentation will cause more extraction of resources, new economic crises and environmental deterioration that is provoking strong displacements due to drought, floods, etc.
b. There are strong demographic unbalances in the midst of high growth; for instance, in some countries the population is ageing while other have high percentages of a young population.
c. It is worrying to watch the growth of discriminatory and xenophobic expression that in many cases adopt unprecedented violent manifestations.
d. Policies aimed at restricting mobility are being hardened.
e. There is feminization of poverty, feminization of economy and feminization of migrations.

These are the global trends forming the background against which migrations are taking place, together with the work of social movements, organizations and networks, and States. It is important to think about this context again, and about its implications for human mobility, gender relations and human rights.

We also need to re-think and follow-up the form in which these trends are expressed through laws, public policies, institutions and, most importantly, in daily coexistence, considering that there will not be any substantive change unless cultural barriers and social relationships are changed. This phenomenon requires efforts to further develop the human rights framework and specific guidelines on the topic changing the logic of selectivity and centrality, as well as the primacy of residence over travel: nobody is tied

to residence and to a single type of residence. Travelling, migration and mobility are constitutive of the different forms of residence and of their historical nature.

To end, I consider it necessary for us to understand that people's freedoms are fundamental and the challenge is to learn how to live with migration, with human mobility, as it is not going to disappear internally, internationally, regionally or globally, because it is intrinsic to humanity. Two great challenges for human rights and for them to become an effective tool to restrict forced and unsafe human mobility are: How do we coexist with the facts of migration in our daily lives? And, how do we relate to the environment, to nature, to non-humans?

BIBLIOGRAPHY

ACOSTA, Alberto, Susana LÓPEZ y David VILLAMAR, 2006. *La migración en el Ecuador. Oportunidades y amenazas*, Quito, UASB.

Asamblea Constituyente (Constitutional Assembly), *Constitución de la República del Ecuador, 2008.* Disponible en www.asambleanacional.gov.ec/.../constitucion_de_bolsillo.pdf

CHÁVEZ, Gardenia, "Derechos humanos y políticas migratorias: el caso del flujo migratorio de Ecuador hacia España, 1998-2005". Forthcoming.

Coalición por las Migraciones y el Refugio (Coalition for Migration and Refuge), *Informe Sombra al primer Informe del Estado ecuatoriano sobre cumplimiento de la Convención Internacional para la protección de los derechos de todos los trabajadores migratorios y sus familiares*, Ecuador, 2007, in www.acnur.org/biblioteca/pdf/5053.pdf

————————, *II Informe Alternativo a la Convención de Trabajadores Migratorios y sus Familias*, Quito, Ecuador, 2009, in http://www.uasb.edu.ec/UserFiles/369/File/Informes%20alternativos/Segundoinformealternativo-2010.pdf

Committee on the Elimination of All Forms of Discrimination against Women, *General Recommendation 26 on women migrant workers.* Available at www2.ohchr.org/.../GR_26_on_women_migrant_workers_sp.pdf

PADH (Ed.), *Globalización, migración y derechos humanos*, Quito, UASB, Abya Yala, 2004.

PONCE, Fernando, 2003. "La libre circulación de personas: Desafío para el Derecho Internacional e indicador del desarrollo nacional", in *Fe y Justicia*: *Revista de pensamiento cristiano en diálogo con la sociedad y cultura* Nº 9, Quito, Compañía de Jesús, pp. 37-53.

RAMÍREZ, Franklin y Jaques RAMÍREZ, 2005. *La estampida migratoria ecuatoriana. Crisis, redes transnacionales y repertorios de acción migratoria*. Quito, UNESCO, Ciudad, EED, Abya Yala, ALISEI.

United Nations Program for Development, *Human Development Report 2009. Overcoming Barriers: Human mobility and development*. UNDP, 2009 in http://hdr.

undp.org/en/reports/global/hdr2009/

————————, *Universal Declaration of Human Rights,* passed by the General Assembly on December 10, 1948. Available at http://www.ohchr.org/en/udhr/pages/language.aspx?langid=eng

————————, *Convention on the Elimination of All Forms of Discrimination against Women.* Adopted by Resolution 34/180 of the General Assembly, on December 18, 1979. Available at http://www.un.org/womenwatch/daw/cedaw/cedaw.htm

United Nations, *International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families.* Adopted by Resolution 45/158 of the General Assembly, December 18, 1990. Available at http://www2.ohchr.org/english/law/cmw.htm

2. INTERNATIONAL MIGRATION FROM A GENDER PERSPECTIVE: THE CASE OF MEXICO-USA

Ofelia Woo Morales[1]

1. INTRODUCTION

Women have always been present in the history of migration; however, it is only in recent times that a particular emphasis has been placed on them. Castles and Miller (2009) refer to the feminization of migration in the so-called *New Age of Migrations,* recognizing that in some countries female migrants surpass males in number. Pizarro (2003) calls it "quantitative feminization".

According to a report by the International Organization for Migration, in 2005 there were more than 200 million people living outside their countries, and 48% of them were women.

The visibility of women is indeed important in statistics, for governments to learn about the dimension and magnitude of migration. However, due to the bias in studying and analyzing female migration as a migration associated exclusively with family reunification, the recognition of women as social actors with a migratory profile and pattern that is different from those of men is left aside. And thus migration is seeing through a masculinized lens.

International migrations must be understood according to the population that is being studied in the national contexts, both of origin and destination. For instance, the Philippines has a policy directly impacting on its population's migration and on the international labour market; it is a mostly female, skilled and multidirectional migration.

[1] Professor-researcher with the Socio-Urban Studies Department, Social Sciences and Humanities University Centre, Guadalajara University, Guadalajara, Jalisco, Mexico.

But in the case of Mexico, the migration is unidirectional, male and female; the former is directly related to the labour market, while the second is multicausal and both are mostly aimed at the neighbouring country, the USA.

In order to understand the specificities of women's participation in international migration, several authors – Pessar (1999 and 2007), Pizarro (2003), Zhou (2002), Ariza (2000), Woo (2001), Hondagneu-Sotelo (1994) – have integrated gender as an analytical perspective that helps to know and understand women's migratory patterns. This interest is invoked also to present the case of Mexican women migrating to the USA and to frame the contributions of the notion of feminization of migration.

This document is structured in three parts. The first consists of a brief overview of women's relevance in international migration and the labour market; then we recall gender as a category allowing us to learn that social and structural relations depend on the context – origin/destination of migration – and, lastly, through the analysis of female Mexican migration to the USA we will trace the changes that have taken place in the Mexican migratory process from a gender perspective.

2. THE FEMININIZATION OF INTERNATIONAL MIGRATION

As Castles and Miller point out, international migration is a social process affecting the migrant's life and both the societies of origin and destination, all dimensions of social existence, and evolving its own complex dynamics (2004).

In some countries like Ecuador, Dominican Republic and Philippines, the feminization of migration is already discussed; in other cases, like for instance Mexico, the increase in female migration towards the USA is very significant.

It is estimated that in the USA[2] there are more than 8 million undocumented migrants, of whom 46% of women. Out of them, 44% are of Mexican origin, 24% are Latin Americans (from countries other than Mexico), 16% are Asians, 13% Europeans and 3% come from other regions (Zhou,2002:28). This female migration responds to structural, family and individual contexts.

[2] According to the 2000 USA Population Census, the total population of the country was 281,421,908, of which 35,303,818 (12.2%) were Hispanic or Latin, of whom 20,640,711 (58.5%) were of Mexican origin.

The feminization of migration goes beyond statistics and can be perceived from the country of origin, because it involves pioneers in migratory flows generating changes in the relations of production and reproduction at the global level in the field of paid reproductive (also called domestic) work and in exporting multinational companies (Parella, 2003).

Feminization can also be observed and explained from the countries of destination. The globalization process, the economic restructuration of developed countries (in North America, Europe and Asia), as well as demographic changes have created labour niches for migrant female workers, such as domestic labour, elders' care, sex work, and cleaning jobs, among the most important ones.

It is worth mentioning that in the work of Min Zhour (2002:30) the educational and occupational diversity of migrant women is demonstrated. Migrant women from Jamaica, India, China and Philippines work as nurses and doctors; Indian women are also engineers and scientists, while those coming from Mexico and Central America are mostly employed in domestic work and doing manual work in industries.

As Gammage (2000:77) points out, any analysis of the immigrant labour force is complex due to its heterogeneity: age, sex, legal status and education influence the opportunities available in the labour market and in terms of income; these features differ according to the region and country to which they migrate and to the period in which they arrived.[3]

The studies by Parella (2003), Pizarro (2003) and Vicente (2006) document the feminization of Latin American migration, mostly towards Europe, that has also become a huge receptor of migrants – mostly Spain, Greece, Italy and Portugal. From the 80s and 90s, Latin American migrants – particularly women from Ecuador and Peru – have been the majority of those entering the labour niches mentioned above.

Pizarro (2003) refers to a quantitative feminization, when female migrants from the same region of the country or destination or from outside it statistically surpass male migration in some countries, and to qualitative feminization because it differs from male migration in its motivation, structural, individual and family conditions.

[3] Gammage (2000:77) quotes the work of Repak, who found that women earn between 70 and 80% of the male migrant's income. This author also mentions the case of Chicago, where undocumented workers earn US$7 per hour while those having legal papers earn US$ 9. Some workers reported to be earning less than the federal minimum of US$ 5.15 per hour.

In order to understand the feminization of migration it is necessary to integrate gender in its analysis, because it also conditions migratory practices and policies within the labour-importing countries in America and Europe (Pessar: 2007).

3. GENDER IN INTERNATIONAL FEMALE MIGRATION STUDIES[4]

International migration is a multidimensional process demanding an inter-disciplinary approach. Different theoretical perspectives have tried to explain international migrations from a diversity of disciplines, prioritizing the study of this phenomenon among men; it can be argued that migration has been explained through masculine lenses.

We have several theoretical models focusing on the micro decision levels, such as the neoclassic economic theory that explains wage gaps, employment conditions and migration costs on the basis of a personal decision to maximize one's income. The new economy of migration, analyzes the conditions of different markets (labour markets, financial futures markets, capital markets, insurance markets) to reduce risks to the family income. The dual markets theory tries to explain migration linking it to the structural requirements of industrialized economies; and the theory of world-systems analyzes migration as a consequence of economic globalization and market penetration. These are theories conceptualizing the causal processes at different levels of analysis (individual, family, national and international) (Massey *et al.* 2000).[5]

These theoretical models help us to deepen our understanding of certain aspects (structural and family-related) influencing decision making; however, they do not explain how the gender and generational relations influence the fact of women staying or migrating, because they are not considered social agents.

---

[4] A preliminary version of this section was published in the article "La migración de las mujeres, ¿un proyecto individual o familiar?". In *Revista Interdisciplinar da Mobilidade Humana*, Centro Scalabriano de Estudios Migratorios, AÑO XV, número 29. Brazil 2007.

[5] Several authors have evaluated the different theories trying to explain international migration and concluded that the complexity of the migratory process needs to be analyzed from the structural factors in both countries (origin and destination) to the individual factors (motivation, family status, networks, etc.). See Massey, Douglas S. Joaquín Arango, Hugo Graeme, Ali Kouaouci, Adela Pellegrino y Edgard Taylor, 2000. "Teorías sobre la migración internacional: una reseña y una evaluación. In *Revista trabajo, migraciones y mercados de trabajo*. January-June, Nº 3, año 2. Jorge Durand and Douglas Massey, 2003. *Clandestinos. Migración México-Estados Unidos en los albores del siglo XXI*, Editorial Porrúa y Universidad Autónoma de Zacatecas. Joaquín Arango, 2003. "La explicación teórica de las migraciones: luz y sombra". In *Migración y desarrollo*. Nº 1, October.

Women migrate for a variety of reasons including family reunification, job search, refuge, asylum; the search for better economic, labour, professional conditions; greater independence from the family or to flee domestic violence, as has been documented by Pessar (1999), Zhou (2002), Vicente (2006) and Woo (2007).

The decision to migrate is the outcome of a process in which relations of power, autonomy and subordination are created. Some times, the process includes negotiations or conflicts in gender and generational relations.

To analyze female migration from a gender perspective means to acknowledge that inequity between men and women does not have a biological explanation but is rather based on social constructions and power relationships, as affirmed by Pessar (1999), Hondagneu-Sotelo (1994) Grieco and Boyd (2003).

I would like to quote the definition provided by Benería and Roldán (1992:24):

> Gender can be defined as a network of beliefs, personality traits, attitudes, feelings, values, behaviours and activities making men different from women through a social construction process... (translation ours)

The assumption we are presenting in this article is that traditional male and female roles have different representations and meanings, according to the social context of residence (origin or destination). "Female and male might mean different things in each society" (Serret, 1992, translation ours). Female migration is discussed in several studies, trying to clarify if it brings autonomy and more equity. Pessar – a pioneer in researching migration and gender – points out that some findings on women's emancipation in migration have been premature and are often imprecise. Other authors like Ndioro Ndiaye (2006) believe that migration might foster autonomy and a greater equity among men and women. Ariza (2000) and Woo (2001) agree in that – depending on the gender status in the contexts of origin and destination – women might acquire a greater autonomy or subordination, because the social constructions of masculine and feminine go beyond the individual and family environment, to become part of a context that is both social and cultural.

Several authors like Pessar (1999), (2007), Hondagneu-Sotelo (1994) and Ariza (2000) have proved that in some contexts some women benefit from migration and their incorporation in the labour market; that is why it is important to include the multiple relations of race, class, nationality and legal status in the study of female migration (Pessar, 1999), as women constitute a heterogeneous population.

Along this same line, for Grieco and Boyd (2003) not all family members benefit from migration in the same way, as internal contradictions, power relations and a diversity of interests emerge within the family when decisions to migrate, work or educate the children are made.

Applying a gender perspective and recognizing female migrants as social actors allow us to understand how individual and family projects, as well as structural conditions in the countries of origin and destination intersect, as women do not respond in a mechanical and uniform manner to the development of these structures.[6]

Guendelman (1987) found that there were changes in gender relations when Mexican women settle in US society, expressed in a distribution of power and in attitudes. The author argued that those changes were mediated by social and economic relations originating in the context that they face in their new society. An important factor was women's participation in paid work, as she identified that non-working women maintained traditional roles. According to Guedelman, when a woman *successfully* enters the US labour market, there is a stronger influence leading to change in her traditional roles but when she *fails* in her attempts to join the labour force, the result is a loss in autonomy.

These results have been reaffirmed by studies like those of Melville (1980) and Hondagneu-Sotelo (1994), who agreed in pointing out that there is a reinterpretation of women's rights and obligations, linked to the possibility of obtaining paid jobs in the USA.

Women's transitions, particularly when they migrate to or join the labour market in the USA, imply changes not only in their life-cycles but also in established roles both in the family and socially. Even though these studies emphasize the changes generated in women's roles regarding the males in their families, the implications they have for changing roles among men cannot be ignored.[7]

---

[6] This approach can be found in: HONDAGNEU-SOTELO, Pierrete. *Gender Transitions. Mexican Experiences of Immigration*. ARIZA, Marina. *Ya no soy la que deje atrás…mujeres migrantes en República Dominicana*. WOO, Ofelia, *Las mujeres también nos vamos al norte*. HIRSCH, Jennifer. *A Courtship after Marriage: Sexuality and Love in Mexican Transnational Families*.

[7] HONDAGNEU-SOTELO, *op. cit.,* found that in the "family stage migration" there are significant changes in the roles of men and women within the family. The author's core argument is that the emigration of men preceding that of women, generated a transition process in which men were faced with the need to take part in activities related to domestic work while the fact of staying in their country of origin and the prolonged absences of the husbands allowed women to control their own activities.

A recent study by Hirsch (2003) outlines generational and geographical changes in the social construction of gender, pointing out that these changes cannot be explained in a simple way, by reducing them to women automatically benefiting from migration; rather, these changes are the result of a gradual process taking place in different spaces where women acquire power and autonomy.

We need to analyze the contributions by migrant women studies in relation with the studied population, its social context and according to the lived and told experiences of its protagonists, migrant women.

4. MEXICAN WOMEN'S MIGRATION TO THE USA

In the case of Latin American migration originating in Mexico, different migratory patterns have been identified responding to the changes and transformations in the profile of migrants, recurring economic crises, the withdrawal of the welfare State from social policies and the creation of social networks.

The migration from Mexico to the USA is a process that has existed for more than a century: it is a unidirectional and massive migration. Mexico has more than 10% of its population living in its Northern neighbouring country.

Even though the emergence of women in academic studies is recent, they have always been a part of this migratory process that is more than a century old. It is the history of many Mexican families: the first women who migrated did so as mothers, wives and sisters of the so called *braceros,* the men who left as part of the Temporary Workers Program that lasted for 22 years (1942-1964). This program generated a family reunification process in some communities of migrant workers, that resulted in a generational and generalized tradition by which the most of all the family members moved *North.*

This migratory profile prevailed and little was documented on the relevance and effects caused by the migration of women and families in certain migrant communities; women were simply invisible in the studies on the migration of Mexicans towards the USA, because it was an associative migration and, as such, the decision was made by the man and women were not considered social agents in the migratory process.

It was only in the 80s, with the passing of amendments to the Immigration Reform and Control Act (IRCA, 1986) in the USA,[8] when migrant women became visible and it was documented that more than 40% of all applications for legalized status were from women. By the year 2000, the USA Population Census registered more than 20 millions Mexicans, 45% of whom were women.

Why do they migrate? Who they are? Where do they go? These questions are always relevant, because migration is a complex and dynamic process.

These women no longer migrated for family reunification but also to work. The proportion of married women almost equalled that of single women; the profile had changed and so had the reasons: it was obvious that we could no longer refer to a homogeneous female migration.

The decision to migrate represents more of a survival strategy for women and families, and is based on individual expectations around work, or is due to family or economic problems, and even to domestic violence.

There is a negotiation process around decision-making that is cross-cutting to all the phases in the migratory process since the decision is made: how to do it, where to go, where to work and even if/how/when to return to the place of origin.

Now we know that female migration is multicausal and for some women those causes are hidden, depending on their histories and life-cycles. It is worth pointing out that female migration is supported by solidarity relationships, established social networks and the social capital generated by those migrants preceding them in the journey, as most women have had no previous migratory experience. But there is also a need to acknowledge that these women are also building their own networks, with their own dynamics and structures.

It is only in 1980, when the importance of the participation of Mexican migrant women in the US labour market becomes evident for Cornelius (1988) and Bustamante (1989), that there were attempts to explain female migration through the US labour supply and demand, aimed at satisfying the labour needs of the international market.

[8] These law reforms aimed at stopping migration through several measures: legalizing undocumented migrants; punishing the employers of non-legalized workers; increasing the budget for the Immigration and Naturalization Service to stop undocumented migration.

However, it is documented that women have worked in paid employment since arriving in the USA: in the sewing industry, in the fields, in packing industries, to mention just a few of them.

> The clothing industry is a good example of how the labour dynamics of the late 30s and 40s affected Mexicans in Los Angeles. Towards 1939, there were 634 clothing factories in Los Angeles. These factories employed a total of 15,890 workers, 75% of whom were Mexican women and girls (Castillo and Ríos Bustamante, 1989:227) (translation ours).

Women have always had to work for a living in the USA. "No work, no food" ("*Si no trabajas, no comes*") is a recurring saying among female migrants.

Currently women are employed in factories or workshops, family homes (as domestic servants), cleaning office buildings (as janitors), in restaurants and small shops, that is, as unskilled and unspecialized labour. It has been documented that, compared with female migrants from other countries, they receive the lowest salaries (Giorguli, Gaspar and Leite, 2007).

Mexican migrant women are not integrated in all activities that make up the US economy; it can be argued that there is a labour segregation in which gender, legal status, race and ethnicity play a key role, as pointed out by Pessar (1999), Hondagneu-Sotelo (1994), and Zhou (2002).

For women, living in the Mexican or US society has a different meaning than for men. He always longs for his motherland and wishes to go back, while she misses home but recognizes and values herself as a woman, because she realizes she is facing economic and social situations allowing changes in the traditional roles in her relation with the husband, father and children. Working, earning her own money and even the concept domestic work itself have different representations in the new society.

The studies on female migration agree that, unlike men, women prefer to settle in the USA. The creation of a new family or the reunification of the existing one; the new meaning of roles taken up in the home, their entry into the labour market, the consolidation of social networks, are all factors contributing to women deciding to remain in the USA for a prolonged period or in some cases for good.

When they migrate, work or live in a society with different cultural values, women might increase their self-esteem and enjoy a greater participation in family decision-making and resources. However, it has not yet been documented if those changes are radical and/or generational.

None of this means that women and families understand migration or their stay in the USA as a success at all levels; there is an acknowledgement of exploitation at work, of discrimination in the workplace and in society, and of the xenophobic environment that has increased in recent years.

Parents are also concerned about the social and cultural environment their children have to face: they are afraid of gangs, drugs, vandalism. The need to preserve and nurture their values and culture emerges. (Woo, 2001).

In the case of Mexican migration – of both genders – to the USA, what we have highlighted is that it is a migration with a particular migratory pattern. Why is it important to highlight this in the Mexican case? Because the historical male migration to the USA was a work-oriented migration responding to the selectivity of the temporary workers programs. Women's migration does not necessarily depend on the labour conditions: it is pluricausal, can only be understood through a multidimensional analysis and also women tend to stay in the USA for longer periods and in some cases to permanently settle there.

In regards to migration from Mexico to the USA, we can affirm that there is a redefinition of traditional male and female roles. This is not black and white: there are nuances, grey areas, because it is a social and cultural process.

Throughout my research, I have found that women show a higher self-esteem, not only because they work and have their own income, but also because they are acquiring goods that were unreachable in their country of origin and integrating into a new society.

In their testimonies, some women say: "*I did not even imagine that by coming to the USA to work I was going to be able to drive and own a car; in Mexico, I could never have thought of having a car. Here I can get a car for UC$ 100 and it is not a luxury, it's a need, because in the USA the car is an important tool for circulating".*

Saskia Sassen[9] refers to women's migration as a vanguard migration, because of the change and transformation processes taking place. It is an interesting idea because be they empowered or not, depending on the contexts and analysis that we make, women effectively generate processes of transformation and change, not only in the family but also in the wider society.

For Mexican migration to the USA, social networks are key: in a migration that is more than a century old, social networks have not only been consolidated but also restructured.

It was said that women migrated for family reunification purposes, and when they joined the labour market, it was because the men found jobs for them; thus, they were fully dependent on men. Hondagneu-Sotelo (1994), Davis and Winter (2001) and Woo (2001) have found that the composition of social networks is intrinsic to gender analysis. For example: men build their social networks in the spaces that usually are meaningful to them like the *cantina*, the football field or the workplace; while women show a greater diversity in terms of spaces and activities. For example in the USA, the church or the children's school are spaces that women have reclaimed as theirs, in which they are allowed to understand or participate in the new society, that is so different, while male activity is much more restricted to the trajectory of home-workplace.

These restrictions in male social life lead to a longing for the motherland. On their part, women say "I want to stay", because their experience is different, they are giving new meanings to their actions and lives, what it means to be a woman, the gender status in the destination country, in spite of all these anti-migrant, xenophobic, racist and discriminatory polices, even because of them.

5. SOME REFLECTIONS

The visibility of migrant women helped to explain the changes in the profile of migrants that took place in the 80s, as well as the emergence of a different migratory pattern - the longer stay in the USA - as compared to the traditional pattern of circular or temporary migration, identified with male migration.

[9] First International Seminar: Migration in the Early 21st Century, October 13-15, 2009, organized by UNAM in Mexico City.

Of course the longer stay is also related to the excessive vigilance over the USA Southern border. Migratory policy reform and control have influenced the changes in migration patterns and dynamics. All the migratory policy reforms that have been introduced in the USA, lead to a deterrent policy that aims at making crossing the border harder and to discourage migration. Human rights organizations have hammered crosses to show the deaths of migrants attempting to cross because since 1993 to the date on which the border regulating control programs were established, more than 5,000 people died while attempting to cross.

A border wall built by the USA government in the Tijuana-San Diego border, highway to the Tijuana airport.

Photo: Ofelia Woo Morales, August, 2009

Along with female migration there is child migration, the emptying of some locations that traditionally expel migrants, and the division of families whose members have different nationalities.

The magnitude and complexity of migration is affecting millions of inhabitants: women who stayed because their husbands migrated; women who migrated, leaving the children with their parents; men who long to go back to the motherland but are unable to do so because they have no livelihood options there; families who no longer cherish the "Mexican dream" of going back to the motherland to enjoy the profits obtained abroad.

To incorporate gender in the study of female migration helps us to understand that women have a migratory pattern differing from that of men in motivation, trajectories and networks, in micro and intermediate dimensions, but also structurally, at a macro-level, labour markets and migratory policies are responsive to this gender status, violating women's human, labour and social rights.

BIBLIOGRAPHY

ARIZA, Marina. 2000. *Ya no soy la que dejé atrás… Mujeres migrantes en República Dominicana*. Plaza /Valdez, IIS. México D. F.

BENERÍA, Lourdes y ROLDÁN, Martha. 1992. *Las encrucijadas de clase y género. Trabajo a domicilio, subcontratación y dinámica de la unidad doméstica en la ciudad de México. 2ª* ed., El Colegio de México, FCE. México D. F.

BUSTAMANTE, Jorge. 1988. *Migración de indocumentados de México a Estados Unidos*. Fundación Ebert. México D. F.

CASTLES, Stephen and Mark Miller. 2009. *The Age of Migration. International Population Movements in the Modern World.* Guilford Press, New York. (4th edition).

CASTILLO, Pedro G. y Antonio Ríos Bustamante. 1989. *México en Los Ángeles*. CONACULTA y Alianza Editorial Mexicana. México D. F.

CORNELIUS, Wayne A. 1988. "Los migrantes de la crisis: The Changing Profile of Mexican Labor Migration to California in the 1980s". *Paper* submitted: "Population and Work in Regional Setting". El Colegio de Michoacán, Mich. Noviembre 18-30. Zamora.

DAVIS Benjamín and Paul Winter. 2001. "Gender, Networks and Mexico-U.S Migration". *The Journal of Development Studies*, Volume 38, No 2, London.

GARCÍA, Brígida y OLIVEIRA, Orlandina de. 2006. *Las familias en el México metropolitano: visiones femeninas y masculinas*. El Colegio de México, México: D. F.

GAMMAGE, Sarah 2000. "Women Immigrants in the U.S. Labor Market: Second-Rate Jobs in the First World. In *Women Immigrants in the United States.* Migration Policy Institute, Woodrow Wilson International Center for Scholars.

GUENDELMAN, Sylvia. 1987. "The incorporation of Mexican Women in Seasonal Migration: a Study of General Differences", in *Mexican Immigrant Women*, *Hispanic Journal of Behavioral Sciences*, Ed. V. Nelly Salgado de Snyder, California.

GRIECO, Elizabeth; BOYD, Monica. 2003. "Women and Migration: Incorporating Gender into Internacional Migration Theory". Center for the Study of Population, Florida State University, College of Social Sciences, Working Paper. WPS 98-139, ISSN 0740-9095
HIRSCH, Jennifer. 2003. *A Courtship after Marriage: Sexuality and Love in Mexican Transnational Families*. University of California Press, Berkeley.

GIORGULI Silvia, Selene GASPAR y Paula LEITE. 2007. *La migración mexicana y el mercado de trabajo estadounidense*. CONAPO, México D. F.

HONDAGNEU-SOTELO, Pierrete. 1994. *Gender Transitions. Mexican Experiences of Immigration*. University of California Press, Berkeley.

KESSLER, A. Judith. 1996. "Undocumented Latinas and Immigrant Status: Negotiating the Fronteras of Illegality in Every Life". Submitted to the Pacific Sociological Association, March 22. Seattle.

MELVILLE, Margarita. 1980. "Selective Acculturation of Female Mexican Migrants", in *Twice a Minority: Mexican American Women*. University of Houston. St. Louis: Mosby.

MASSEY, Douglas S. Joaquín Arango, Hugo Graeme, Ali Kouaouci, Adela Pellegrino y Edgard Taylor. 2000. "Teorías sobre la migración internacional: una reseña y una evaluación. En *Revista Trabajo, Migraciones y mercados de trabajo*. January-June, No.3, Year 2.

NDIORO, Ndiaye. "Women, Migration and Development". 2006. Keynote address to the International Conference on the Human Rights of Migrant Women, Mexico City, April 24-25.

OLIVEIRA, Orlandina. 1996. "Familia y relaciones de género en México". In *Humanismo, mujer, familia y sociedad.* COLMEX, INNSZ, Mexico City.

PARELLA, Sonia. 2004. *Mujer inmigrante y trabajadora, la triple discriminación*, Spain, Anthropos, Barcelona.

PESSAR, Patricia. 1999. "Engendering Migration Studies. The Case of New Immigrants in the United Status". American Behavioral Scientist, Vol. 42, Nº 4.

———————— 2007. "Mujeres, género y migración internacional en y más allá de las Américas: desigualdades y empoderamiento limitado". In *Migración internacional, desarrollo en América Latina y el Caribe*. CONAPO, SEGOB. México D.F.

PIZARRO, Martínez, Jorge. 2003. "El mapa migratorio de América Latina y el Caribe: las mujeres y el género". In Serie Población y Desarrollo Nº 44. Proyecto Regional de Población CELADE-UNFPA (United Nations Fund for Population). Santiago de Chile.

SERRET, Estela. 1992. "Género, familia e identidad cultural. Orden simbólico e identidad femenina". In José Manuel Valenzuela (coord), *Decadencia y auge de las identidades. Cultura nacional, identidad cultural y modernización.* El COLMEX/Programa Cultural de las Fronteras, Mexico City.

VICENTE, Trinidad. 2006. "Mujeres, género y migraciones internacionales: una realidad por redefinir". Keynote address to the International Conference on the Human Rights of Migrant Women, Mexico City, April 24-25.

WOO MORALES, Ofelia. 2001. *Las mujeres también nos vamos al norte*. Universidad de Guadalajara. Guadalajara.

———————— 2007. "La experiencia migratoria de las mujeres urbanas hacia 'El Norte' ", in ARIAS, Patricia; WOO MORALES, Ofelia (Coord). *¿Campo o ciudad? Nuevos espacios y formas de vida*. Universidad de Guadalajara, Guadalajara.

ZHOU, Min. 2002. "Contemporary Femele Immigration to the United Status. A Demographic Profile", in *Women Immigrants in the United States.* Woodrow Wilson International Center for Scholars. Division of United States Studies. Migration Policy Institute. Available at www.wilsoncenter.org

3. BETWEEN BORDERS, CROSSINGS AND WALLS: WOMEN'S EXPERIENCES IN MIGRATION

Ana Silvia Monzón[1]

A FEW INTRODUCTORY WORDS...

I am Guatemalan and have approached Migration Studies from at least two perspectives: as a feminist scholar, but also as the daughter of migrants. In fact, my father and mother – through different routes and at different times – migrated more than three decades ago to the USA. It was only in the process of writing my doctorate thesis, in the last five years, that I fully assumed this identity, that for years was just a piece of information and today I realize is a way of life.

The pages that follow constitute a way to come closer to that reality now involving millions of women around the world, shaping the lives of those leaving and staying, of those who are in an ongoing journey, of those who never made it and on those who are on their way. Those crossing physical and symbolic borders. Those holding life together here and there.

[1] Feminist. Doctorate in Social Sciences from FLACSO-Central American Post-Graduate Studies Program. Co-founder of the communication initiatives Voces de Mujeres, Red Mujeres al Aire and Mujeres Abriendo Caminos. Teacher in the Gender Studies Program, FLACSO-Guatemala.

1. WOMEN AND MIGRATION: DIFFERENT ASPECTS

1.1 Women and migration in the context of globalization

Nowadays, women's participation in migration can not be separated from the broader processes of feminization of poverty and the effects of economic neoliberal globalization that have caused a restructuring of labour markets. This reconfiguration that has taken place in the labour markets and the political, symbolic and cultural spaces, has undoubtedly an important impact on social, ethnic and gender structures.

In this context, labour conditions become increasingly precarious and imply the loss of social rights, economic, civic, political and cultural rights, a situation that is even harder for female and male migrants, deprived of their human and citizenship quality and made into a labour force that is outside the social benefits provided by the rule of law (Gregorio, 2009).

This understanding of the labour force divests people of their history, desires, expectations and life projects. Around the world and in the Latin American region, women's integration in the international migratory movements is an undeniable fact, as migrants or as part of a family in which men and women both leave in search of new opportunities. However, this situation has been scarcely visible in academic literature, public policies, statistics, the media and political actions, even in the women's movement and feminist agendas.

In the case of Guatemala, the invisibility of women in these processes continues and the efforts to build statistical data reflecting this reality are incipient; indeed, the statistics and research on the specific aspects of women and migration are very few. In the migratory context, for now, women continue to be seen as patient Penelopes receiving remittances to manage the family's survival, waiting for the uncertain return of their partners. Or like *white widows* – a concept coined in Guatemala as *viudad blancas* – prisoners of their roles as mothers and wives of an absent spouse; as silent travellers, whose number and itineraries we hardly know; as victims who are particularly vulnerable in a hostile journey; and, in exceptional cases, as successful women in the countries of origin and destination.

These classifications are not enough to capture the diversity of experiences and dynamics experienced by women, by those staying and those leaving. Their skills to actively participate in transformative processes – or even in identity-based resistances – in the appropriation of new spaces, symbols, practices and rights, are not yet acknowledged. From a different perspective, what is also being ignored is their participation in reinforcing social identities and relations structured around gender, ethnicity and class.

In this complex and contradictory dynamic, new identities are emerging. Among others, that of migrant women, that is, those who leave, those who have left and came back, those who stayed ... and others that we have not yet been able to name. For instance, those who stayed still lack a term that defines them; for now, they are defined only in terms of the action of migrating in which others engage, with or without their approval.

These different conditions of women raise the need to widen our analysis about the multiple relations taking place in migratory processes, to adopt a broader vision of the production and social change processes, and also to pay attention to the action strategies, both material and symbolic, of the female and male actors involved in the migration *continuum.* This concept, coined by Carmen Gregorio, provides a picture of the dynamic, changing, complex and diverse nature of the migration process. This *continuum* alludes to fluid family, social and community, but also economic, cultural, religious, social and political relations. Fluidity is, undoubtedly, a sign of the times.

1.2 A historical perspective on migrations

In the case of Guatemala, there are several types of migrations, for instance the temporary and permanent internal migration for reasons of servitude. Historically, these migrants were Indigenous women and later also *mestizas* of rural backgrounds who were mobilized to serve in landlords' houses. This demand continues today and, again it is Indigenous and rural *mestiza* women who form the bulk of domestic workers, an occupation that usually has a precarious profile.

In the 19th century, with the introduction of agro-exporting crops like coffee and then sugar cane or cotton, a new economic system began, with a considerable demand for cheap labour, including that of women. Since that time, a system of large and small landholdings persists, perpetuated by the fact that the availability of land for livelihood is so scarce that families, particularly those of Indigenous peoples from the highlands,

are forced to temporarily migrate to the South shore lands during the harvesting months. This circular migration was modified during the cruellest years of the internal armed conflict, during the 80s. However, it is a process that continues and includes cross-border migration to agricultural states in the South of Mexico or in Belize.

As a rule, seasonal agricultural work is performed by the entire family. However, even in the current labour laws, women are not recognized as labourers but called "contributing labour", like working boys and girls, and all of them are paid less than male labourers.

The profile of women migrating internally, in a temporary and/or permanent way, includes girls and women from the rural areas; a high percentage of them are Indigenous and in the case of Guatemala, with low formal education or illiterate. Many of them speak only their native tongues. This condition has many implications for the ways in which they adjust to urban contexts that were unknown to most of them before migration.

Internal migration, temporary and permanent

- Servitude: Historically there has been demand for female labour to serve in landlords' houses (during the Colony, in the 19th, 20th and 21st centuries). Rural-urban migration.
- Agricultural work: agro-exporting crops (coffee, sugar cane, cotton, new crops - 19th, 20th and 21st centuries). Indigenous migration from the highlands to the shore, and to states in the South of Mexico. Temporary.
- More women than men migrate from rural to urban areas: Guatemala 57% women, 43% men; El Salvador 54% women and 46% men; Honduras 54% women and 46% men.

Source: Monzón, Ana Silvia. *Las viajeras invisibles* (2006

Cross-border migrations are those taking place between countries that share borders, like Nicaragua-Costa Rica in the Mesoamerican region, in which 49% of Nicaraguan migrants are women; this kind of migration has also recently started to occur between Nicaragua and El Salvador, as Nicaraguan workers are temporarily migrating to El Salvador. The migration between Guatemala and Mexico – particularly of agricultural workers – is historical, as is the one between Mexico and the USA that is almost a century old.

Cross-border migrations in the Mesoamerican region:

- Nicaragua -Costa Rica: 49% of Nicaraguan migrants are women (58.4% are between 20 and 40 years old).
- Nicaragua - El Salvador (agricultural labour), recent.
- Guatemala - México: in Tapachula, 90% of domestic workers are Guatemalans.
- Guatemala - Belize.

Source: Monzón, Ana Silvia. *Las viajeras invisibles* (2006).

Transmigrations are the flows of individuals entering a particular territory with the goal of arriving in a third country. In that sense, Guatemala and Mexico are transmigration countries, as they constitute a natural bridge to reach the USA.

Nowadays, international migration is the phenomenon that is most studied in comparison with other kinds of migrations, may be because it involves millions of persons circulating across the world, particularly from the South towards the North.

In Guatemala, international migration towards the USA – the most frequent destination for migrants of both sexes – has experienced changes in recent decades. Between the 60s and 70s, the flow was not significant; those migrating were *mestizas/os*, from the center and the South East region of the country. Later, in the second half of the 90s, there was an important increase, coinciding with the end of the Guatemalan armed conflict. The same trend was documented in El Salvador. In Honduras, migration increased in the wake of natural catastrophes like the Mitch hurricane in 1998.

In Guatemala, contemporary migration flows have been marked by the history of the domestic armed conflict, that was heightened in the 80s, when entire villages in mostly Indigenous areas were wiped out. This forced more than a million person to displace themselves, in a country that had about ten millions inhabitants at that time. Thousands of these displaced persons took refuge in Mexico, and from there many started to migrate to the North, to the USA and Canada.

The increase of migration after the signing of the Peace Agreements in 1996 also followed an economic logic, because during the period in which other countries were applying structural adjustment programmes, in Guatemala this trend was not so marked because the government's main interest was to stop the *guerrilla* by military means. Once the conflict was overcome and – paradoxically – in times of peace, the effects

of neoliberal economic measures started to be felt: privatization of State companies, greater openness to foreign investments, liberalization of the financial markets and of trade. The combination of reduced domestic labour openings due to these measures and an increased demand of labour in the USA also had an influence on the increase in migration.

The more recent migration flows are marked by the prevalence of undocumented migration and the circulation of a larger number of persons from the rural areas, due to the recurring crisis there. We also see that migration has ceased to be circular, that is, that migrants – men more than women – used to go back to their countries of origin and to migrate again some time later. Now migration has a permanent character because the countries of destination – particularly the USA – are enforcing legal measures criminalizing migration. They have built physical, political and ideological walls that make it impossible for migrants to risk going back to their countries of origin, because it would be harder for them to return as migrants. The raids have multiplied, violating basic rights of migrants and the number of deportations of undocumented migrants who are sent back to their countries of origin has also increased in a significant way.

In contrast and particularly in the last two years, because of the financial crisis that severely affected the USA's economy, it is possible to witness the phenomenon of voluntary return, as migrants are faced with the lack of employment and the reduction of their income.

The impact of the economic crisis in the countries of destination, that heightened during the second half of the first decade of the 21st century, has had serious effects on the labour demand for migrants. Latin American migrants of both sexes who have gathered mostly in Los Angeles, California, New York and Miami, have diversified their destinations within the USA and this is reshaping the Latina/o presence not just in economic but also in cultural terms.

1.3 Changes in the profile of international migrants of both sexes from Guatemala

On the basis of its economic, political, social and cultural effects, an important change in the profile of international migrants is the growing presence of Indigenous individuals in migration flows. The first Indigenous persons who migrated to the USA did so in the late

80s, from communities in the Huehuetenango district. Later on, because of the armed conflict, the number of Indigenous migrants increased and some migrant communities began to be created on the basis of their local cultural identities. For instance, a group of *kanjobales* – from the North-Western highlands in Guatemala – have settled in Florida, in a community known as Indiatown, where they are affirming their collective presence.

A situation worthy of attention is that the segregation between Indigenous peoples and *mestizas/os* that is typical of Guatemala is reproduced in the USA, as a result of the racist and discriminatory trends shaping Guatemalan society. For instance in Los Angeles, California, where there is a large presence of Guatemalans of both genders, it can be seen that Indigenous persons and *mestizas/os* live in different areas and seldom get together around a single national identity. This is less pronounced in the case of the Salvadoreans, whose national identity is much stronger, and whose first wave of migrants in the 80s was highly politicized. Because of this, it was easier for Salvadorean migrants to organize themselves and occupy political and even academic spaces, as they contributed to create the First Central American Studies Program at the Northdridge University, California.

However, from a different perspective, it is worth mentioning that in the last decade a growing number of organizations advocating for the rights of migrants have emerged. Partly this was a reaction to the xenophobic manifestations that followed the terrorist attacks of September 11, 2001. Indeed, discriminatory acts towards migrants, particularly those of Latino origin, have forced these groups to organize and make their presence felt in the streets, as on May 1, 2006, when hundreds of thousands of migrants and their descendants demanded their human rights. This movement has been compared with the civil rights struggles taking place in the 70s in the USA (Monzón, 2009).

2. JOURNEYS THROUGH WOMEN'S EYES

Until very recently, migrant women were invisible to those studying the phenomenon of migration. Now women are becoming more visible and, this is partly due to the contributions of feminism, a theoretical perspective that has illuminated a fact that now seems to be obvious: that women experience conditions, situations, relations and history in specific ways. And that migrations are not exempt from this.

In the first place, it is worth highlighting that contrary to the widespread idea that women are rooted in a particular place, waiting for Prince Charming to come and rescue them, taking them to explore other worlds, Dolores Juliano (2000) argues that women are structurally – and not exceptionally, as was assumed – travellers.[2] That is, throughout history women have circulated as much as men.

Another issue that I want to highlight is that, in many cases, when women move they don't want to return. This trend[3] is related to a deep process of identity building in women. Like Simone de Beauvoir argues, women have been constructed as *the other*. In that sense, for them to move to a different place and be *the other* is simply a different way to experience what they have always experienced. Instead for men, displacement often means a loss of identity and power, particularly when it occurs in conditions of irregularity and poverty. They lose their place in the public sphere and this is why they articulate the idea of returning with a greater frequency, even if they never make it a reality.

Finally, in this quick review of myths associated with women's journeys, it is worth mentioning that, contrary to widespread belief, women have always migrated and indeed they form the majority of domestic migration flows. Historically, women have migrated more than men for reasons linked to gender roles: they take care of others and perform the household chores, in the past in landlords' houses and nowadays in urban homes in megacities.

2.1 The feminization of migrations. Why and how do women migrate?

Women migrate for a variety of reasons: one of them is the cultural mandate of patrilocality, that can be summarized in the idea that women, after marriage, must follow their husbands. The other reasons have to do with political reasons, war, exile, that have been part of the history of Latin American countries up to now; this is for instance the case of Colombia, as it was of the Central American region in the 80s.

[2] It is worth noting here that the first female hominid identified as an ancestor of humanity is Lucy, a discovery that broke the myth of hominids as the ancestors for the evolution of the species (Suárez, 2008).

[3] This idea has also been articulated by Dr Ofelia Woo, another presenter at the CLADEM workshop(Lima, 2009).

Other reasons influencing the decision to migrate have to do with work, economy and environmental impact. Also because of family or community stigma, when women transgress the behavioural norms that are expected of them: for instance, up to some decades ago, pregnancy in an unmarried woman was a scandal, and a motivation to migrate.

From another perspective, gender violence is a reason why women embark on a long journey. The cases of women applying for asylum in the USA due to domestic violence are an indicator of this reality. According to data gathered by Morales (2005), Mexican and Guatemalan women are those who most often look for legal protection to avoid being deported, claiming that their lives will be at risk if they return to their countries of origin.[4]

Finally, women migrate for their own reasons, exerting their autonomy, against the widespread explanation that women migrate "following their husbands" and only for family reunification purposes. Even though this might be the case many times, there is also a growing trend of women being the ones deciding when and how to migrate.

This diversity of perspectives on women's motivations to migrate, leads to the conclusion that nowadays there is a phenomenon of feminization of migrations. Both in qualitative – because the whys and when to migrate have multiplied for women – and quantitative terms. In fact, women constitute almost half of all migrants around the world. And those who don't migrate, feel the effects of migration in their daily lives, that is, millions of women are involved in the dynamic of migrations.

It is worth pointing out that, for women, migrating has personal, political, sexual and psychological implications. To embark on a journey from within a feminine body[5] implies vulnerability and risks, human rights violations, bodily abuse and violations, as it has been documented particularly on the path to Mexico. Rape and sexual abuse are seen by migrant women as part of the cost of migration.

[4] In this sense, the case of Rodi Alvarado, Guatemalan, is representative. She obtained asylum in the USA, where she had migrated in 1995 to flee a situation of abuse on the part of her partner, with whom she lived for 10 years. Her asylum claim, on the grounds of domestic violence, was denied several times but finally in 2009 migration authorities granted her the status of refugee. That same year, the Obama administration expressed its intention to include domestic violence as a ground for asylum in the USA.

[5] This does not imply ignoring the dangers that men also face. But there are specificities in the case of women that it is important to highlight.

Other situations faced by women migrants on their journeys are unwanted pregnancies, mutilations and illnesses that are seldom made visible. Because even though it might seem obvious, bodies are exposed to transformations when they migrate: they change along the way, they change from reaching *el otro lado* (the other side), and the patterns of health and illness change. Those changes are not only cultural, symbolic or political, but also biological. Women also face the risk of falling into prostitution, because many are stranded along the way and, in order to obtain an income, they are forced to prostitute themselves as a way to get the money they need to continue their journey.

Now, if we change the perspective to a more positive one with the aim of not pointing out only the shadows of this phenomenon, it is important to value the fact that these journeys, even though they are risky, also bring new learnings, experiences, challenges and knowledge to women.

2.2 "Migrated" women: profile and expectations

According to the International Organization for Migration (IOM, 2007), Guatemalan migrants in the USA are approximately 400,000 of whom 75% are undocumented. A brief socio-demographic profile shows that most are between 20 and 40 years old; a high percentage are married and have some degree of schooling, which means that those migrating are not the poorest or the least educated. The main destinations are California, New York, Texas and Florida.

Most women sent remittances on a regular basis; even though they send lesser amounts than men, they do it for a longer time. Men might send larger amounts, but often stop doing so and the cases of men permanently abandoning their families in the country of origin are common.

In the last three years, there has also been a decreasing trend in remittances. Because of the crisis, remittances are reaching the families with lesser regularity, forcing the women who stayed, to work in order to complement the family income.

In relation to remittances, it is possible to differentiate between the monetary and social ones that can also be individual or collective. Individual social remittances are those practices, ideas and information that migrants are continuously sharing. In this process, women play a key but invisible role, because patriarchal culture assigns them the role of

reproducing culture and the responsibility to maintain the emotional links between those who left and those who stayed. In terms of collective social remittances that translate into the contributions that migrant communities send to their places of origin, it is worth highlighting that they are usually managed by men who attempt to earn some prestige through them.

Profile of Guatemalan women who migrated to the USA

Approximately 397,000.
Between 20 and 40 years old; 51% of them are married.
52% of them have some degree of schooling and 5% are illiterate.
75% are undocumented, which means that only 25% are able to travel and visit their families in their places of origin.
140,000 live in California; 33,000 in New York; 25,000 in Texas; 18,000 in Florida.
330,000 send (monetary and social) remittances to Guatemala

(IOM, 2007)

2.3 What do women find in the USA?

The phenomenon of migration is multifaceted: many times migrant women manage to successfully insert themselves in work spaces that help them move out of their precarious situation, in other cases they face multiple disadvantages and, particularly in the last decade, discriminatory and xenophobic reactions.

Many of the women migrants, because of their gender status, find jobs in what is known as the global care chains. That is, they take up caring roles in the destination country while other women in their communities are left to take care of their own children. This dynamic reproduces gender inequalities and the separation between public and private life. Migrant women perform the household chores that US women – who have entered the labour market – no longer do, without gender roles being altered in the place of origin or of destination.

In the USA, migrant women also face other situations that render them vulnerable: the language barrier (that affects not only those who only speak Spanish but also those who are monolingual in Mayan or in other Mexican Indigenous languages) and cultural practices that are foreign in their context, because often they migrate from rural communities to megacities.

Also, in these recent years, the fear of deportation both of women themselves and of their partners is compounding this situation. Let me give you one example: the issue of family violence. Even though many women have found a greater institutional response to cases of violence, that somehow dissuades men from attacking them, faced with the threat of deportation now there is a manipulation not to expose the abuse, because it is a ground for deportation of men, regardless of the fact of their being regularized migrants or not.

In contrast to the situations described up to now, some women find opportunities for participation in the place of destination that they probably would never find in their countries of origin. As an example it is worth highlighting the case of two Guatemalans, Norma Torres, born in a village in the Southern shores who is now an MP in California and was the first woman mayor in Pomona City (in the same state); and Julia Gabriel, a young Indigenous woman who received an award for her struggle on behalf of agricultural workers' rights.

Women also find economic opportunities. Latina women, as they are identified, have started to profile themselves as leaders in small business. The following data shows a qualitative change in the female presence in the USA:

From migrant to businesswomen?

- The number of businesses owned by Latina women increased by 209% during the 1997-2002 period.
- Latinas owned 17% of all businesses in California.
- In total, they own more than 470,000 businesses in the USA.

Source: Monzón, Ana Silvia. Las viajeras invisibles (2006)

2.4 Women: between borders.

Reality lies across the wall, and reality also lies this side of the wall...

PARAPHRASING OF A POEM BY P. URONDO.

Migrations are transforming social, gender, ethnic, political, economic and cultural relations. In this sense, the role of communications is vital, because rapid technological changes are modifying what it means to live thousands of kilometers away from one's place of origin, blurring borders and allowing people to be connected and participating in the daily lives of their families in both places.

But there are other situations that women are experiencing in the context of migration that are worth noting:

Intermittent couples, a term that refers to the experiences of couples who get married, then the husband migrates, to return a few years later and then migrate again. It is a new type of couple.

New forms of violence against women. Often women are left unprotected when their partners are no longer with them. Due to the patrilocal mandate, they are "entrusted" to the care of the fathers in law or other relatives, exposed to mechanisms of control limiting their development and autonomy.

Another experience of the women who stay is that their caring roles are prolonged: when they end their vital cycle in which they took care of their children, they continue taking care of their grandchildren ... and of their great-grandchildren if they live long enough.

On the other hand those who leave – the 'migrated' women – face other challenges: adapting to new environments; looking for and taking advantage of unprecedented opportunities; building new relationships and cultural practices that summarize their pre-migration life experiences; and incorporating new elements of the destination country's culture. But they also face the paradox of continuity in their gender roles that still place them as wives and mothers.

However, both for those who leave and for those who stay, new possibilities for self-realization, citizenship, less rigid roles and opportunities to taste the honey of personal autonomy open up.

BY WAY OF CONCLUSION

The phenomenon of migration is an undeniable fact and reveals trends that cannot be generalized. For this reason it is important to continue researching and basically integrating a gender perspective with the goal of sketching a more complete landscape of the impacts on gender and ethnic identities and roles, on gender relations, on the family and community fabric, on the exercise of citizenship, as well as on social, economic, political and cultural practices.

Migrations, and particularly those of an international nature, are immersed in globalization processes that are transforming geographies, hierarchies, and power structures. In that complex, dynamic and contradictory context, women who migrate but also those who stay, start their journeys, face walls, live in between borders, continue to weave relationships, providing care, contributing with their visible and invisible work, facing challenges, longing for the return of those who left or renewing their promise to return.

Migrations

I once had a city
- I know it -
Geographical instant
where burning afternoons
were buried in brief streets.
Generous stay
of walls resisting
the rule of fear.
Meek uterus
moored in early mornings
of wet breathing.
I detached myself
when absence
offered me her feet,
rough journey without propitious shelter
Now I am
the grafting of a plant
that can adjust nowhere.
I had a city once
- I know it -.

Dina Posada (Salvadorean/Guatemalan)

BIBLIOGRAPHY

GREGORIO GIL, Carmen. 2009. "Mujeres inmigrantes: colonizando sus cuerpos mediante fronteras procreativas, étnico-culturales, sexuales y reproductivas". In: *España, Viento Sur*, Nº 104. http://www.vientosur.info/

JULIANO, Dolores. 2000. "Mujeres estructuralmente viajeras: estereotipos y estrategias." Papers 60. s.d.e.

MONZÓN, Ana Silvia. 2009. "Mujeres, ciudadanía y migración. Mujeres catarinecas: experiencias vitales y de ciudadanía en el contexto de la migración internacional hacia Estados Unidos." Guatemala, FLACSO-Programa Centroamericano de Postgrado (Doctorate Thesis in Social Sciences).

———————. 2006. "Las viajeras invisibles. Mujeres migrantes en la región centroamericana y el sur de México." Guatemala, PCS-Consejería en Proyectos.

ORGANIZACIÓN INTERNACIONAL PARA LAS MIGRACIONES. 2007. "Encuesta sobre remesas, 2007. Perspectiva de género." Guatemala, OIM. Cuadernos de Trabajo sobre Migración, Nº 24.

SUÁREZ TORO, María. 2008. *Mujeres: metamorfosis del efecto mariposa*. Costa Rica, Editorial Farben/Norma.

UN. High Commissioner for Refugees (UNHCR). Matter of Rodi Alvarado Peña (A73 753 922). Advisory Opinion on International Norms: Gender-Related Persecution and Relevance to "Membership of a Particular Social Group" and "Political Opinion", January 9, 2004, in: http://www.unhcr.org/refworld/docid/43e9f6e64.html.

SECTION 4

Globalization and Human Rights: Current Challenges

1. GLOBALIZATION AND HUMAN RIGHTS: DISCOURSE AND REALITY OF A COMPLEX RELATIONSHIP

Gaby Oré Aguilar[1]

INTRODUCTION

In recent decades, a plentiful literature on globalization – considered "the second great transformation" after the industrial revolution – has been produced, addressing its nature and its effects, from different disciplines and ideological perspectives. This makes it possible to identify today some common denominators in conceptualizing globalization and different dimensions of this phenomenon.

There is consensus about the fact that globalization is not a new phenomenon, but something that has occurred throughout history and that what has changed are the features and forms that it adopts, as well as the means through which it manifests itself. The latter determine the rhythm or the speed of changes caused by globalization. There is also consensus about the following: in the current globalization, it is the economic aspects that prevail even though there are parallel political, social, cultural and other dimensions that have attracted less attention in the literature on human rights and globalization.

In an essay on the relationship between human rights and globalization, Dinah Shelton[2] articulates a definition that adequately focuses on the different features of globalization that are present in mainstream literature on the subject:

[1] Lawyer, specialized in International Human Rights Law. L.L.M. from Columbia University, New York, and graduated in Law and Political Sciences by Universidad Nacional Mayor de San Marcos, Lima.

[2] Dinah Shelton, "Protecting Human Rights in a Globalized World," Boston College *International & Comparative Law Review*, Volume 25, 2002, Nº 2, p. 2.

> Globalization is a multidimensional phenomenon, comprising "numerous complex and interrelated processes that have a dynamism of their own". It involves a deepening and broadening of rapid transboundary exchanges due to developments in technology, communications, and media. Such exchanges and interactions occur at all levels of governance and among non-state actors, creating a more interdependent world. (References omitted).

The United Nations Human Rights protection system, through different bodies and documents, has addressed globalization affirming the need for it to be managed taking into account fundamental human rights principles. In a resolution recently passed by the UN General Assembly on the human rights implications of globalization, it states that *globalization is a complex process of structural transformation, with numerous interdisciplinary aspects, which has an impact on the enjoyment of civil, political, economic, social and cultural rights, including the right to development.*[3]

Even though a more holistic discourse on globalization, highlighting the interdependency of rights has come from the United Nations, it is also true that its most relevant statements, resolutions and documents focus on the economic aspects of globalization and its impact on human, economic and social rights.

The economic dimension is characterized by the interdependency of (national) economies, the deregulation of markets and the expansion of capitalist ideologies. As the Canadian author Rhoda Howard-Hassmann points out, even though she acknowledges the importance of the other dimensions of globalization (the expansion of information, the easiness of communications, human mobility, migration and its impacts on culture),

> ... capitalism is the main driving force and beneficiary of globalization. [...] Capitalism is the economic system behind the new information and communication technologies, of the huge and fast unprecedented flows of capitals, and behind the capacity of transnational corporations to spread across the world."[4] En la cita el nombre de la autora aparece como Horda

This framework has determined a greater leading role of an economic and financial nature for non-State or private actors and international organizations, as a result of the changing role of the State. And, at the same time, both factors have generated a recent

[3] Resolution passed by the United Nations General Assembly, A/RES/63/176, March 20 2009, para 10.

[4] RHODA E. Howard-Hassmann, "The Second Great Transformation: Human Rights Leapfrogging in the Era of Globalization," *Human Rights Quarterly* 27, 1-40 (2005), p. 7.

process of response to and involvement in that process by the international human rights protection system and social movements.

Thus, in spite of the multidimensional and interdisciplinary character highlighted by the definitions already presented, research and analysis on the relationship between globalization and human rights focuses in an overwhelming way on the links created between these rights and economic globalization. Other dimensions of globalization have attracted less attention from the academic human rights field or from the social movements, even though an international agenda on cultural homogenization, ethnicity and collective identities has been increasingly articulated.

Additionally, the emphasis on studying the relationship between human rights and economic globalization can be explained because evidence and literature on its negative impact is more plentiful and visible in the field of economic and social rights than in other spheres. Widening gaps in inequality, inequalities among countries and within them, the erosion of labour rights, the impact of foreign investment on the environment, the effects of regional and international free trade agreements, are among the most frequently addressed topics in the human rights and globalization agenda.

In recent years, the interests of academic research and the reflections by human rights activists have mostly focused on the relationships between international trade, labour rights, economic governance (financial institutions) and privatization.[5] More recently, research and advocacy issues on States' transnational obligations and extraterritorial accountability have been produced, along with others on the role of non-State economic actors (corporations and financial institutions) in regard to their regulation and accountability.

The purpose of this presentation is to provide a brief analysis of the relationship between human rights and globalization, addressing those areas that have exposed the limitations and dilemmas of the International Law framework, as well as the trends emerging in the process of responding to those challenges. A few topics from the agenda that is emerging in the context of globalization, along with strategies and actors involved, are also mentioned.

[5] Koen de Feyter, "Localizing human rights" in Benedek, W., De Feyter, K., Marrella, F. (eds.) *Economic Globalisation and Human Rights*, Cambridge, Cambridge University Press, 2007.

1. RELEVANT NOTIONS AND DEBATES FOR ANALYZING THE RELATIONSHIP BETWEEN GLOBALIZATION AND HUMAN RIGHTS

1.1 The dual nature of human rights with regard to globalization

From the point of view of globalization, human rights play a dual role. As Shelton rightly points out,

> ... Finally, it is noteworthy that human rights law not only potentially imposes duties on non-state economic actors, it guarantees rights essential for the furtherance of globalization. It protects the right to property, including intellectual property, freedom of expression and communications across boundaries, due process for contractual or other business disputes, and a remedy before an independent tribunal when rights are violated. Furthermore, the rule of law is an essential prerequisite to the long-term conduct of trade and investment.[6]

Human rights are a global project. The global claim of human rights consists in achieving the validity of certain standards of human dignity that are considered universal. Shelton finds that

> ... Pressed by an international network of non-governmental organizations and activists, the international protection of human rights itself can be seen as an aspect of globalization, reflecting universal values about human dignity that limit the power of the state and reduce the sphere of sovereignty.[7]

From the same perspective, Koen De Feyter illustrates the complex relationship resulting from the mutual impact between the human rights normative framework and globalization, by stating that economic globalization affects human right, but the opposite is also true. For this author, given that human rights constitute a global project, they can be used to shape economic globalization.[8]

---

[6] Dinah Shelton, "Protecting Human Rights in a Globalized World". *Op. cit.*, p. 3.

[7] *Ibid.*, p. 2.

[8] De Feyter, "Localizing human rights". *Op. cit.*

However, acknowledging the global character of human rights, it is also important to highlight that, on the one hand, the institutionalization of the human rights protection system has progressively included a diversity of perspectives from social groups, promoting civil society participation and that of victims in drafting international instruments and in the functioning of the monitoring system within and across State borders. This is what some have called "bottom-up globalization". On the other hand, the normative human rights framework is a system based on an international membership policy that is acquired through signing human rights treaties. The enforcement of binding norms (hard law) assumes a willingness on the part of the State to follow the norms and standards included in the treaties to which it subscribes.

1.2 The Universality of Human Rights

In general terms, the universality of human rights has been challenged from the origins of this framework. That is why the most typical scholarly debates in the field of human rights are those between *universalists* and *cultural relativists*. Analyzing this topic, Joan Bauer states that,

> Universalists build their understanding of human rights upon the liberal tradition whereby rights are accorded to the individual by virtue of being human. Cultural relativists, on the other hand, argue that values are grounded in specific communities and that the communal group, and not the individual, is the basic social unit. In reality, however, the ideological spectrum is much more complex; realizing that complexity can help point us to where the challenges to international human rights actually lie.[9]

After analyzing the debates on human rights in three regions (Asia, Africa, the Arab world) and the USA (comparing the cultural/nationalist and activist/intellectual views), the author comes to the conclusion that the most relevant disagreements are not about human rights principles but around their implementation and prioritization in regional agendas; and suggests to Western scholars that they change the focus of their research substituting the concern about cultural relativism with an exploration of the efforts to *culturally legitimize* human rights as "... as a way of meeting the many challenges to international human rights everywhere."[10]

---

[9] Joanne Bauer, "The Challenges to International Human Rights", in *Constructing Human Rights in the Age of Globalization (International Relations in a Constructed World*), Mahmood Monshipouri, Neil Englehart, Andrew J. Nathan, and Kavita Philip (Editors), M.E. Sharpe, Marzo 2003. (239 -258), p. 240.

[10] *Ibid.* p. 253.

One of the most visible points for discussion and articulation of a discourse on culture and human rights has been the mandate of the Special Rapporteur on Violence Against Women. In a report on the intersections between culture and violence against women,[11] the Rapporteur affirms that resistances to the universality of human rights and its validity in the local context have been present from the origin of these rights and the view of human rights as an *external imposition* is incompatible with local culture. In addition, she calls attention to the fact that in Western countries, cultural practices discriminating against women are considered as belonging to *Others*, alluding to developing countries or migrant communities. She criticizes both positions as belonging to a cultural essentialism in which these positions

> "... ignore the universal dimensions of patriarchal culture that subordinates, albeit differently, women in all societies and fails to recognize women's active agency in resisting and negotiating culture to improve their terms of existence".[12]

1.3 The theory of "localizing" human rights

The human rights legal framework[13] includes, among other elements, norms originating in global treaties and normative frameworks, exigibility mechanisms and the institutions before which the enforcement of these norms is demanded. In the relationship between the local and global aspects of human rights, the translation or contextualization of these norms in the local context is mediated by a network of actors operating at different levels in those spaces.

In the economic global debate, the term *localization* is understood as an alternative system for production and consumption that seeks to revert the globalization process, favouring the local over the global level and strengthening the economy from the bottom up.[14]

---

[11] United Nations Human Rights Council, *Report of the Special Rapporteur on Violence against Women, its causes and consequences; YAKIN ERTÜRK, Intersections between culture and violence against women.* A/HRC/4/34, January 17, 2007.

[12] *Ibid*. para. 68.

[13] August Reinisch suggests a set of elements defining the "legal framework" that we adhere to for this document: 1) The standards or behavioural substantive rules; 2) The procedures used in discussing, supervising and may be even enforcing compliance with standards; and 3) the institutions. AUGUST REINISCH, "The changing international framework for dealing with Non-State Actors," in Philip Alston (ed.) *Non-State Actors and Human Rights*, Academy of European Law, Oxford University Press, 2005, pp. 38 and 39.

[14] Gaby Oré Aguilar, "The Local Relevance of Human Rights: A Methodological Approach", IOB (Institute of Development Studies), University of Antwerp, Antwerp, 2008/4, Discussion paper, p. 8.

Koen De Feyter reads localization from a human rights perspective. For De Feyter, in the economic globalization context, in order to be relevant, human rights must be applied to a specific context, that is, they must be *localized*. And he introduces an innovative idea about the localization of human rights:

> Localization implies taking the human rights needs as formulated by local people (in response to the impact of economic globalization on their lives) as the starting point both for the further interpretation and elaboration of human rights norms, and for the development of human rights action, at all levels ranging from the domestic to the global. In order to provide efficient protection against the adverse impact of economic globalization – itself inevitably a top-down process – human rights need to be as locally relevant as possible. Global human rights need an infusion from below.[15]

Another researcher, Sally E. Merry, studies the process of localization of international norms on violence against women from an anthropological perspective.[16]

> The author affirms that localization of human rights is part of a hugely unequal global distribution of power and resources that channels how ideas are developed in global contexts and how they are taken in or rejected at the local level. [17]

For Merry, there are several actors in the localization process who contribute in *translating* international norms *from the top down* into local systems as well as telling the stories of local actors *from the bottom up,* using a *global rights language* to achieve their goals.

In summary, the language and approach of the notion of localizing human rights offer, in the first place, an alternative view of the relationship between global and local spaces that puts aside the discussion on universalism and cultural relativism to give the central role to actors and processes of contextualizing human rights and, secondly, it encourages an affirmative and empowering approach to local communities by suggesting their potential role in the process of building global norms on the basis of their experiences of the transgression or affirmation of rights.

---

[15] Koen de Feyter, Localizing Human Rights, IOB (Institute of Development Studies), University of Antwerp, Belgium. 2006/02, Discussion paper, p. 5.

[16] Merry E. Sally. 2006. Human Rights and Gender Violence: Translating International Law into Local Justice, Chicago, University of Chicago Press.

[17] *Ibid.* p. 211

Along the lines suggested by Bauer – to explore the *cultural legitimization* processes for human rights as the most suitable means to identify the multiple challenges faced by international human rights – localization appears as a promising path.

2. GUIDING AND MANAGING GLOBALIZATION?

> [...] globalization should be guided by the fundamental principles that underpin the corpus of human rights, such as equity, participation, accountability, non-discrimination at both the national and the international levels,
>
> **(UNITED NATIONS GENERAL ASSEMBLY RESOLUTION, MARCH 20 2009)**

2.1 United Nations guiding principles to guide and manage globalization

The most recent UN General Assembly Resolution on globalization and its impact on all human rights outlines the elements constituting the position of the United Nations' system on globalization, as well as its support of a form of managing it that is guided by basic human rights principles:

- The State being primarily responsible for promoting and protecting human rights;
- Recognition of the universality, indivisibility and interdependence of human rights;
- Affirming that globalization as a process is not merely of an economic nature but it also includes other dimensions impacting the enjoyment of all human rights;
- Acknowledging the value of culture and diversity; and
- Protecting the human rights of migrant persons.

This resolution exhorts the international community and civil society to *promote equitable and environmentally sustainable economic growth for managing globalization so that poverty is systematically reduced and the international development targets are achieved.*[18]

Even though the United Nations' international system and its specialized agencies have increasingly developed norms and standards in response to changes generated by economic, social and technological transformations occurring in recent decades, the concern on the part of the human rights protection system about finding explicit responses to the phenomenon of globalization started in the 90s. The political bodies of the United Nations Systems and the treaty bodies have produced the largest number of documents and resolutions on the impact of globalization on human rights, and they have built what can be considered a basic framework, a set of human rights guidelines and principles that must guide the actions of economic globalization actors and, above all, the design of international economic policies in such a way that they are compatible with respecting the human rights contained in the treaties. The different documents produced by the United Nations insist that economic globalization does not affect the central State obligations to respect, promote and protect human rights.

However, beyond the discourse, as De Feyter points out, United Nations bodies are increasingly worried about the impact of globalization particularly in the area of trade, and the system has created new mechanisms to address this topic.[19] Likewise, in recent years, the number of resolutions issued by the former Human Rights Commission (now Human Rights Council) and the Office of the High Commissioner on Human Rights on this matter has increased.

The Committees monitoring the treaties, in particular the Committee on Economic, Social and Cultural Rights, contribute in a significant way to watch over the compliance with the rights directly related to the impact of economic globalization. On the occasion of the 50th anniversary of the Universal Declaration, this Committee issued a declaration that, after describing the most typical effects of globalization, acknowledges that,

---

[18] United Nations General Assembly Resolution "Globalization and its impact on the full enjoyment of all human rights", A/RES/63/17620 March 2009, Preamble and paras. 1, 5 and 7.

[19] For instance, the creation in 2002 of a mechanism known as the *Human Rights Council's Social Forum*, a space for dialogue among State representatives; civil society, including grassroots organizations; and inter-governmental organizations, that meets once a year to discuss the "social dimension of globalization"http://www2.ohchr.org/english/issues/poverty/sforum.htm; the appointment in 2005 of a Special Representative elected by the General Secretary on Business and Human Rights, Resolution 2005/59, April 20, 2005.

> None of these developments in itself is necessarily incompatible with the principles of the Covenant or with the obligations of governments thereunder. Taken together, however, and if not complemented by appropriate additional policies, globalization risks downgrading the central place accorded to human rights by the United Nations Charter in general and the International Bill of Human Rights in particular. This is especially the case in relation to economic, social and cultural rights.[20]

As Shelton outlines in detail, the active production of reports and studies on the part of the United Nations human rights bodies in recent years has included studies on transnational corporations, the impact of globalization on the enjoyment of human rights, the impact of globalization on racism and xenophobia, income distribution and human rights at the core of trade, investment and financial policies. An independent expert and a Working Group for this field have been appointed.

2.2 An overview of international actions

Beyond the negative impact that economic globalization has on the enjoyment of human rights – that has been studied widely by several scholars and activists – here we will specifically address the impact of this phenomenon on international human rights law as a framework.

In her essay mentioned earlier in this presentation, Shelton describes in a comprehensive way the responses given by international organizations and the human rights community to the problems of globalization, identifying the following trends in the field of international law:

- Affirming the prevalence of human rights on other international law regimes on the part of the UN system and activists;
- Ratifying the (final) responsibility of the State for the behaviour of non-State actors;
- Direct regulation of non-State actors by International law; and
- Growing use of market mechanisms to influence the behaviour of corporations (self-regulation through codes of conduct or consumer schemes).

[20] *Globalization and Economic, Social and Cultural Rights,* Statement by the Committee on Economic, Social and Cultural Rights, issued on May 11, 1998, adopted in the 18th session (April 27-May 15, 1998), Geneva, para. 3.

The author calls attention to the increasing participation of international actors in international governance mechanisms, with the aim of achieving common goals. While analyzing these responses, Shelton highlights the reaffirmation that States continue to be if not the only, at least the main responsible actors for protecting and guaranteeing human rights and freedoms to their citizens.

For that reason, she warns that if States are expected to assume the role that pertains to them in fulfilling their obligations in the context of globalization, there is "a need to strengthen weak states that lack the institutions necessary to protect and ensure human rights" and, at the same time, to strengthen mechanisms that allow non-State actors to be tried when they undermine State efforts to ensure these obligations or when they are accomplices of the violations committed by the State.[21] The question of strengthening the State is a point for debate, not only at the legal level but also among social movements.

2.3 The question about strengthening the State to regulate non-State economic actors

Even though the position that Shelton advances is usually supported by scholars and activists, others indicate that strengthening the State to regulate non-State actors can imply, on the one hand, that the latter comes in contradiction with the commitments the State has assumed before international financial institutions promoting the opening and deregulation of markets. On the other hand, it might contribute to strengthening a State that could use that power to intervene to the detriment of the rights of private actors, or to expand the regulated spaces to make political use of that sector.

Reflecting on this matter, De Feyter points out that even though economic globalization does not affect the State's ultimate responsibility for the actions of non-State actors, when under a consuetudinary norm States commit themselves to be part of an economic globalization process, more complex legal matters arise. He adds that financial institutions and the World Trade Organization certainly encourage and offer incentives to States for accepting international legal obligations in this field. At this point, the great majority of countries have already committed to liberalize the trade in goods and services, facilitate direct foreign investments, etc. at different levels, under International Economic Law; as a consequence, De Feyter considers that there is a potential conflict between State obligations under international human rights law and its obligations under international economic legislation.[22]

[21] Dinah Shelton, "Protecting Human Rights in a Globalized World". *Op. cit.*, p. 21.
[22] De Feyter, "Localising human rights".

From a different perspective, strengthening the State can be addressed from two dimensions linked to democratizing decisions: the democratization of decision-making within States and State representation in decision-making on global policies at international spaces.

2.4 Expanding the contents of human rights principles into other legal fields

The intersection between globalization and human rights in the United Nations international protection system is also having the effect of expanding the meaning of the principles contained in the different bodies regulating economic globalization policies, in an effort on the part of the UN to contribute to achieving both human rights and globalization goals. While not explicit, this objective is also present in the emerging human rights agenda of several non-governmental actors.

Along these lines, among the *analytical studies* conducted by the Office of the High Commissioner, those deserving special attention are the reports on "non-discrimination in the context of globalization"[23] and on "the principle of participation and its application in the context of globalization."[24] The first analyzes the principle of non-discrimination, both in the contexts of human rights and in Trade Law, differentiating between the objectives of each:

> While the principle under human rights is directed towards protecting the weak and vulnerable and removing the structural barriers to achieving greater equality in society, the principle under trade law is focused more closely on combating trade protectionism and improving international competitive conditions.[25]

In spite of this difference, the studies highlight that

> As international trade rules expand their scope into new areas of government regulation, understanding how the human rights imperatives of

[23]High Commissioner for Human Rights, "Study on the fundamental principle of non-discrimination in the context of globalization. High Commissioner Report."E/CN.4/2004/40, January 15, 2004.

[24] High Commissioner for Human Rights, "Analytical study on the fundamental principle of participation and its application in the context of globalization. High Commissioner Report." E/CN.4/2005/41, December 23, 2004.

[25] *Ibid*., para. 51.

> reducing the structural biases that lead to discrimination and promoting substantive equality within the trade principle of non-discrimination is a crucial question in the debate on globalization.

An underlying premise to this statement is that the fact of combating discrimination and promoting equality might have a positive influence on the dynamics of growth and poverty reduction, contributing in turn to achieving trade goals.

> Globalization has brought a new focus on discrimination. On the one hand, the lowering of borders and improvements in information technology associated with globalization have brought people, products and services closer together, opening up a range of new possibilities for cultural and commercial exchange and for economic growth. On the other hand, globalization has presented its challenges, demonstrating more clearly the stark inequalities both within and between countries. Importantly, the greater flow of people, services and products promoted by globalization has highlighted the need to understand and accommodate difference, diversity and inequality.[26]

Finally, the report on participation refers to the *international dimension* of participation and the different spaces in which it takes place. The report deals with the right to participation at two levels: State participation in the global sphere and direct participation of individuals and groups in global institutions at the international level. The report describes the different forms of participation that can take place in those spaces. It also acknowledges that even though the ultimate decision on its norms and policies in global fora lies with the States, the participation of groups and individuals through civil society organizations is growing and reaffirms the need for "increasing the voice of civil society in institutions related to globalization."[27]

3. A CHANGING REALITY: THE CORE ELEMENTS OF CHANGE

As a space where relationships between the different actors of economic globalization are regulated, international law is where the changes and trends induced by globalization on the subject of rights and obligations are best exemplified. Thus, an analysis like the

[26] *Ibid.* Para. 4.
[27] *Ibid.* Para. 53.

one carried out by Shelton, that exposes the changes produced in international Trade Law and human rights exposes the growing pressures from powerful groups pushing for economic globalization, as well as from the groups resisting or trying to channel it.

In the framework of Shelton's analysis on the different types of answers provided by international organizations to globalizations (as described above), there is a cross-cutting factor, relevant to them all and that at the same time constitutes one of the key axes of normative development in international human rights law: the emergence of non-State actors as an object of regulation. In the current moment (marked by development and transition), it is possible to outline this analysis starting from the empirical observations of scholars, activists and intellectuals that see this process as an unfinished one, but also increasingly regulatory of certain aspects of globalization.

The authors highlight different sets of factors, according to the focus of their studies. However, there is consensus that points at two structuring factors that have resulted in the dominant emergence of non-State actors: shifts in the centres of power regulating economic policies and the decrease in State prominence as the only target of actions aimed at enforcing human rights.

3.1 Shifts in the centres of power for decision-making

The change in terms of where economic decisions are made – that is when hegemonic policies began to be formulated by multilateral organizations (of which States are members) instead of by the State itself – has resulted in a progressive reduction of the State's role in guaranteeing the enforcement of rights for its citizens, which has gone hand in hand with a growth in the power of non-State actors that have taken over the spaces left unattended by different States.

Privatization, one of the aspirations of neoliberal policies promoted by structural adjustment programs, has placed State obligations (together with the risks of non-fulfilment derived from them) in private hands. In this sense, the State has split its functions in two different spaces: planning and adopting economic policies has been left to international organizations and multilateral bodies, while their implementation and the obligations they entail are now in the hands of businesses or corporations.

Regulating the task of controlling and monitoring those companies providing basic services of a public nature has generated a first wave of jurisprudence, arbitrations and other measures, particularly those aimed at ensuring the defence of economic and social rights. However, corporations are progressively entering into more complex and grey areas in terms of regulation: prisons, migrants' detention centres and humanitarian forces in post-conflict situations.

3.2 Lack of State prominence as responsible for and a guarantor of human rights

The human rights system has been designed to confront abuses committed by the State and its agents. In the context of economic globalization, the accumulation of power in the hands of private actors/corporations facilitates their violation of human rights, in forms and ways not contemplated by the traditional human rights framework.

In spite of reiterated statements by the United Nations system and human rights organizations in general affirming that the State is the key target and ultimate guarantor of human rights, in practice the nation-State is no longer the main or only target of human rights groups demanding the enforcement of human rights. Human rights organizations are increasingly seeking new ways to put pressure on or regulate the behaviour of transnational corporations, and to that end they have chosen to directly target financial institutions or multilateral bodies by mobilizing citizens.

The use of a series of mechanisms different from the traditional ones and the search for direct participation – in designing programs or monitoring them – points to a progressive trend that some call "*privatization* of human rights through *privatized* standard setting, *privatized* supervision, and *privatized* enforcement".[28]

Addressing this issue in a speech on the State's role in the context of globalization, Mary Robinson stated: "*I am convinced that despite the many changes that globalization has wrought, primary responsibility for protecting human rights must remain with national governments*".[29] Robinson also favours strengthening national States in developing

[28] August Reinisch, "The changing international framework for dealing with Non-State Actors," in Philip Alston (ed.) *Non-State Actors and Human Rights*, Academy of European Law, Oxford University Press, Oxford, 2005, p. 75.

[29] Mary Robinson, "Globalization and Human Rights", opening speech of the 21st. Century Trust Seminar called *Globalization: Rethoric, reality and Internacional Politics*, Washington D.C. October 31, 2003.

countries to represent the interests of their population as the best long-term strategy to ensure and build State capacity to protect the rights of citizens and to incorporate international standards in domestic laws.

4.CHALLENGES POSED TO THE INTERNATIONAL HUMAN RIGHTS FRAMEWORK

The identification of the main challenges posed by economic globalization to the human rights legal framework, as described in this section, responds to a study of those areas that are key to the normative articulation of human rights and/or of the issues that are now at the top of the agenda for human rights organizations.

4.1 Accountability by non-State actors: codes of conduct

The increase in the number of rules set in codes of conduct is one of the emerging challenges in the context of accountability by non-State economic actors.

Some consider this growing form of regulating transnational corporations as an emerging alternative framework for *accountability* or as a new form of *privatising* human rights.[30] Codes of conducts are legally non-binding norms that are usually adopted in a voluntary fashion by corporations as guidelines for their operations. Reinisch points out that ¨their substance is not limited to human rights, where they may focus on labour and social rights. Rather, they may extend to environmental issues and shareholder interests".[31]

The trend towards self-regulation is not limited to business corporations, among which these codes have proliferated in order to adopt a more active position that helps them to avoid being sued and boycotted by consumers, in many cases helped by international NGOs. Corporations have increasingly adopted codes of conduct that were later extended to international organizations and even to international NGOs, faced with growing pressure for their advocacy practices or to protect their activities in the service provision

[30] August Reinisch, "The changing international framework for dealing with Non-State Actors," *Op. cit.*, p. 42.
[31] *Ibid.,* p. 43.

sector in contexts of emergency relief, natural disasters or humanitarian crisis. The UN also promotes frameworks leading to the development of these codes, as the Global Compact or Working Group on the Activities of Transnational Corporations.

Apart from the different actors joining in the adoption of codes of conduct and the different types of regulations they contain, the trend to self-regulation through codes of conduct implies risks and problems for accountability. Even though there are initiatives aimed at establishing binding and compulsory codes of conduct, they are still exceptional; "the rule still is the weakness of supervisory and enforcement elements in codes of conduct".[32]

4.2 Expanding the nation-State's transnational obligations

The expansion of the State's territorial jurisdiction can be one way to ensure protection of human rights. The use of universal jurisdiction in International Penal Law has had varied but usually positive effects in eradicating impunity for international crimes. From this perspective, extraterritorial human rights litigation can be considered "a form of decentralized enforcement of international law".[33] Along this same line, Reinisch finds it useful to look into other fields of extraterritorial jurisdiction, such as Humanitarian Law and other forms of international criminal justice, that can grant universal jurisdiction on serious crimes, to reinforce actions against non-State actions or complicity in the commission of these crimes.

Mary Robinson argued that there was a legitimate trend towards expansion of extraterritorial State responsibilities in International Law, "where power is exercised – whether it is in the local village, the corporate board room, or in the international meeting rooms of the World Bank, the IMF or the WTO."[34]

However, the current trend is towards restricting universal jurisdiction. States are limiting the scope and use of these norms. Spain, one of the countries with an active universal jurisdiction that made the Pinochet case possible, has just reformed its legislation as a result of pressure from countries like Israel and China, whose active or retired officers had pending cases before the Spanish tribunals for the Israeli bombing on Gaza in 2002 and the repression of members of the Falung Gong spiritual practice group, respectively.

[32] *Ibid.* p. 53.

[33] *Ibid.* p 58.

[34] Mary Robinson, *loc. cit.*

4.3 Economic, social and cultural rights

Economic globalization has brought havoc to different areas pertaining to economic and social rights of the world population, and it is not yet possible to measure its final effects in the short-term. For this reason, the Committee monitoring the ICESCR has stated in a more assertive way both the negative aspects of the impact as well as the rules and principles that are to guide globalization. It has also analyzed State obligations and its role in monitoring non-State actors providing services on its behalf. In terms of the legal and normative challenges posed by these rights, the following specific areas for concern have been noticed:

- Globalization has questioned the capacity of States to fulfil the rights of association for workers, the right to decent conditions of work and social security, as a result of trade agreements and the lack of human rights guarantees in those agreements. Nowadays, there is a demand to enforce those agreements in detriment of workers' rights. The legal security that corporations demand from States raises an additional difficulty, even in the presence of political will.

- The food, financial and energy crises have exacerbated the consequences of globalization – that was already generating inequalities – and have prompted a series of international resolutions and political commitments. In terms of international legislation, the question of including human rights in development cooperation and also solidarity have been brought to the table, seeking to translate these principles into norms binding rich States to take measures in financial matters, in the protection of human security networks, and in the dilemma of producing harvests for alternative energy in the face of the food crisis.

- Protecting those sectors that are the most exposed to economic globalization, like migrant workers, women working in free-trade zones, and, child labour are areas in which, in spite of the advances made, there is still a problem of enforceability of international norms.

In summary, globalization has brought into the human rights agenda, in a most urgent way, the need to close the gaps between the development, international cooperation and human rights agendas.

4.4 Equality/ non-discrimination

Migration flows and human mobility have become typical features of economic globalization, mainly due to their negative impacts on the most impoverished countries. In parallel to this trend, there is another that opposes social mobility: that of national security and the counter-terrorism strategy pushed after 2001 by those countries that consider themselves to be targets of international terrorism.

The international human rights framework has been harmed by the passing of national or regional laws restricting and criminalizing the circulation of persons, but promoting the flow of capital. Not only has this inconsistency in the international legal framework not yet been resolved, but there is also a lack of formulae to facilitate human mobility. On the contrary, the restrictive tendencies have prevailed to the detriment of the human rights of migrants, refugees, persons claiming asylum and also against certain communities like the Roma in Europe. The lack of protection for migrant workers is increasing and xenophobic and racist practices are encouraged even by the State administration in countries like Italy.

On the other hand, the inclusion of new conceptual frameworks in policies and standards to combat discrimination and achieve effective equality in the international human rights protection system and also in regional spaces like the European Community, has presented new alternatives and challenges to States. As a result of the reflection and political actions of social movements in recent decades, protection against *multiple discrimination* has broadened internationally since the preparatory process for the World Conference against Racism (Durban, 2001), thanks to the visibility achieved by ethnic identities and the progressive advances made by other identities in response to cultural globalization.

Responding to this reality, the United Nations system, its specialized agencies and other political and legal decision-making bodies at the national and regional levels, have started the process of incorporating *intersectionality* and *mutidimensional equality*. Unidimensional frameworks for protection against discrimination have proven insufficient to eradicate discrimination in a globalized reality. Its consolidation in international law and jurisprudence and its translation into national legislations are topics that will continue to be on the agenda for the next decade.

5. GLOBALIZATION OF POLITICAL ACTION AND ADVOCACY

In a changing international framework as the one we have summarized, monitoring the enforcement of human rights becomes more complex. For this reason, even though the study of this field goes beyond the goals of our analysis, we consider it important to briefly refer to the most relevant trends in actions and strategies coming out of the globalized action of non-governmental organizations and social movements. The shift in political and economic decision-making centres has also produced new forms and strategies for monitoring. Through empirical observation, the following trends can be identified:

5.1 De-localization of monitoring and political action spaces

In the context of economic globalization, enforceability and accountability for economic and social rights have been reinforced with the adoption of the Optional Protocol to the Covenant on Economic, Social and Cultural Rights. However, the positive obligations contained in these rights are materialized through the adoption of public policies whose monitoring responds to a logic that is different from that of the States' negative rights (obligations to refrain from actions). Even though the State is still the target, it is also true that the centres of power making ultimate decisions on these policies are located in spaces different from those of the State. In addition to this, what characterizes the actions of NGOs in the current context are the strategies of enforceability and judiciability of ESCR and the attempts to influence international spaces like the WTO, WB and IMF.

5.2 The adoption of interdisciplinary instruments and methodologies

Monitoring international or regional trade agreements, economic policy documents and other instruments of a similar nature, demands a level of technical knowledge and inter-disciplinary work that has encouraged the use of other tools and expertise from a variety of disciplines or fields of knowledge. While monitoring of development policies has increasingly incorporated a rights-based approach, in the field of human rights a

process of broadening and building experience in financial matters, budget analysis, development of indicators and tax policies has started. Monitoring of international cooperation policies has also increased and the principles of solidarity and equality have also become prominent in analyzing those policies.

5.3 Globalizing actors: transnational networks

Advocacy for social justice has become decentralized and diversified, resulting in the creation of *transnational networks,* NGO coalitions and other pressure groups acting in a concerted but diversified manner, in different spaces where *power elites* operate. The relationships among different actors within these networks are not devoid of conflict, not only around access to resources but also to representation. It is possible to identify some characteristic features of these networks' political action: North-based organizations working in coalition with Global South ones, and non-governmental influential organizations that seek a place at the table to make decisions together with international policy makers.

An interesting study conducted by four transnational feminist networks that studied a series of international organizations and networks operating at the international level,[35] describes among its findings: a) That the new "social movements", such as the women's movement, are not necessarily *non-economic* and focused on identity, but they organize themselves around issues ranging from economy to reproductive rights and their countries' foreign policies; b) that their analytical units might include local, national or international spaces, or a combination of these; c) that they challenge sociological analysis of societies, that is still focused on Northern and Western countries before the reality of the flow of labour, capital and ideas that these networks have exposed; and, d) that these networks are the new organizing style of the global movement and that *networks* as a form of organizing are also a way to globalize the organizing processes.

[35] Valentien Moghadam, "Transational feminist networks: Collective Action in an Era of Globalization," in *International Sociology*; Vol. 15; Nº 57, 2000.

5.4 Are advocacy strategies being globalized?

Growing access to information flows on the part of non-governmental organizations and the existence of more spaces for socializing advocacy practices have enabled the circulation of information and analysis of advocacy strategies, of what works (best practices) and what does not. Even though it is possible to speak of a homogenization of practices and strategies, the creation of regional or international agendas around the UN consensus and platforms, like the action of international networks and other similar processes, have generated a series of resources for analysis and the spread of strategies and practices for the protection and defence of human rights.

CONCLUSIONS

Rhoda Howard-Hassmann says that

> globalization speeds up not only the process of capitalist expansion but also that of resistance to capitalism. For this author, Social action promotes human rights not only in theory but also in practice and globalization is, ultimately, a potentially powerful tool for promoting human rights at the global level. She considers that quantitative studies can not determine if, as an end result, it promotes or damages human rights, so to judge globalization as a tool for social change is no more sensible today than it was at the industrial revolution in 1780 or 1800. Howard-Hassan highlights that, such as then, the negative consequences in the short-term are obvious today, and – also such as then - humanitarian sectors must today fight to overcome the damages caused by deprivation, underemployment and poverty. Her conclusion is that today just like before, we do not know what the end result is going to be.[36]

Without entering into the discourse about globalization being good or bad for human rights, this analysis has emphasised the fact that a parallel development and an emerging agenda have been generated as a response to the effects of globalization on treaty-recognized rights. Through the UN system's goal of *guiding and managing* globalization, the scope of those norms and principles contained in human rights treaties is being expanded to facilitate enforcement of human rights obligations by non-State economic actors and, eventually, to make them directly accountable for the violations of those human rights.

[36] Rhoda E. Howard-Hassmann, "The Second Great transformation: Human Rights Leapfrogging in the Era of Globalization". *Op. cit.*, p. 39-40.

On the other hand, the involvement of actors like the human rights and social justice movement is increasing, and it is becoming more focused on centres of power where decisions about policies are made. The dilemmas of representation and access to information and resources that come with the configuration of a new international elite deserve to become a matter of reflection for the human rights movement. Paradoxically, the success of this agenda of *resistance*, is to a certain extent dependent on communications and technology being globalized; on the cultural and social globalization of those very same societies opposing globalization; on the ongoing action of transnational networks confirming what is known as the Global Solidarity Network; on what some authors characterize as *grassroots globalization*;[37] and on the continuity in the evolution and expansion of accountability mechanisms and norms -in short, on the globalization of human rights action.

[37] Rhoda Howard-Hassmann. *Op. cit.* quoting Arjun Appadurai, *Grassroots Globalization and the Research Imagination*, 12 Pub. Culture 1, 15 (2000).

COMMENTS

by María Elena Reyes[1]

I would like to congratulate Gaby for her considerable systematizing effort that raises new points for discussion, such as the suggestion around localization and human rights. These are issues that challenge many of the beliefs and wisdoms that are deeply set in us; they challenge what we have experienced or what we have started to develop, not only at the national but also at the regional level.

I believe the concept of globalization stirs up controversy because it takes place between a given fact – a phenomenon that is currently taking place – and an aspiration – how we would like globalization to change for the better. Globalization "includes differentiated but not disjointed sets of social relationships: technological, economic, political, cultural or legal... there are different globalizations going on in different spaces".[2]

In a brief commentary, I will discuss a few features of globalization and the contradictions raised by them, to then analyze, as a contribution to the debate, some theoretical stances on the relationship between human rights and globalization.

Virginia Maquieira[3] believes that globalization is marked by its being a process, a historical phenomenon that is yet to be completed, as it depends on human action. It is multidimensional, as it is a process in which, as Gaby pointed out, different dynamics linked to economic transformations, new technologies, the political world, and above all culture, in its different dimensions, coexist, for good or for bad.

---

[1] Peruvian feminist lawyer, who completed her Law degree in the Peruvian Pontificia Universidad Católica. She is currently pursuing her Doctorate in Human Rights with the Universidad de Salamanca, Spain. She has also been a post-graduate student in Women s Studies in the Universidad de Oviedo, Spain. She has worked in the field of international development cooperation as an advisor on public policies, and does research on gender, development and human rights. She is a member of CLADEM Peru and the Manager of the Gender Program at CARE, Peru.

[2] PISARELLO, Gerardo ,y otros (2003). *Derechos sociales y globalización: a modo de introducción*, Observatori DESC, Catalunya, p.8. (Translation ours)

[3] MAQUIEIRA, Virginia (ed.) (2006). *Mujeres, globalización y derechos humanos*, Ediciones Cátedra, Colección Feminismos, Madrid.

Another feature of this process could be the clear interconnectedness it facilitates across societies, social groups and territories implying radical changes in the ways of thinking and organizing, in time and space. Thus, we are or can be affected by acts and/or decisions of social bodies foreign to our national or regional context. A clear example of this is the financial crisis: where it originated, its scope and the speed at which it extended and reproduced itself.

Globalization is also characterised by so called delocalization or deterritorialization that refers to the transformation in the links between space, culture, economy and politics through huge waves of migration mobilizing people, knowledge, information, capital and institutions. The analysis of these trends tends to overlook the deterritorialization of democracy or human rights.

However, globalization cannot be seen exclusively from this perspective of world-wide interconnection, interdependence or communication, because it also shows serious incongruences. A clear example is that globalization presents itself as a uniform social system reaching the farthest corner of the planet, affecting and transforming human beings in a homogeneous way, regardless of their cultures, genders, ethnicities, economic status, etc., when in reality it produces large gaps, differential impacts and hierarchies, and facilitates the excessive accumulation of wealth for only a few.

In the same framework of assumed uniformity, globalization spreads the message that we are all increasingly similar in the ways in which we act, behave, decide, dress, spend ... that is, that we are becoming the same through the logic of consumption. However, the great challenge to this expression of globalization is multiculturalism.

In this framework, it is understood that there are theoretical positions affirming that there can be no connection between globalization and human rights, as the two realities oppose and are antagonistic to each other, while others claim that globalization has come to strengthen the notion of human rights.

From a feminist perspective, Silvia Walby stresses the positive value of the links between globalization and human rights, based on the idea that understanding of human rights is fed by the development of global institutions, as mechanisms that have transformed political action in the search for justice. Thus, the globalization process is not opposed to human rights but provides a context and a possibility for them to

be affirmed.[4] Using a universalising discourse, she values the relationship between globalization and human rights, stressing the importance of the circulation of ideas and values, using the unprecedented innovations brought up by information technologies, telecommunications, transnational political action and also the emergence and spread of institutional mechanisms creating new spaces and legal guarantees.

However, Javier de Lucas refers to the globalization process as "a betrayal of the old enlightened ideal of the universality of human rights, as it is a merely economical globalization that has widened the gap between rich and poor countries".[5] This economic globalization is presented as analogous to universalization, when in fact it is incompatible with the logic of universal human rights or with the emancipatory ideal that human rights seek as a theory of justice. In terms of rights, the globalization discourse is not a movement towards universalization but rather it translates into a progressive conditioning of rights: while the universal subjects of globalization, i.e. basically the circulation of goods and the flow of financial capital, improve, the rest of the population, i.e. the majority, suffer increased restrictions in the bearing of their rights.

These positions might be revealing different ways of understanding globalization that are not necessarily in conflict, as they highlight specific processes and are always in favour of universalizing human rights.

Moreover, I agree with Javier de Lucas on the existence on what he calls "two-geared globalization". It consists in a slow globalization of human rights, as compared to the pace of economic globalization:

> " ... while the universal subjects of globalization are not affected, the rest of the population suffer increased restrictions in the bearing of their rights, as derived from national citizenship, subordination to merit and skill, instrumental or economic rationales... The consequence is that, again, for the majority of the population, a considerable portion of rights are concessions that would never be granted to them because they won't be able to pay for them, because they are not fully capable or deserving of them or simply because they are not citizens".[6]

[4] WALBY, Sylvia (2001). "From Community to Coalition: The Politics of Recognition as the Handmaiden of the Politics of Equality in an Era of Globalization", in *Theory, Culture and Society*, p. 113-135. Quoted by Maquieira, Virginia.

[5] LUCAS, Javier de (2008). "Las globalizaciones y los derechos", in *Enrahonar*, 40/41, Universidad de Valencia Instituto Universitario de Derechos Humanos, pp. 55 – 66. (Translation ours)
http://www.raco.cat/index.php/enrahonar/article/viewFile/85365/110362

[6] *Op. cit.* p. 58 (translation ours).

In the same sense, Pisarello points out that "globalization from above", as he calls it, is a globalization that excludes human rights, and particularly social rights, a process that basically consists in privatizations, restrictions to democracy and the creation of deep inequalities. Using the State and its capacity to carry out its privatization agendas, none of the changes induced by the globalization process at the economic level could have been "successful" without being endorsed by the military and political institutions and, of course, without a suitable ideology: neoliberalism.

As a way of conclusion, Pisarello states the need of a globalization "from below", defined as a socializing, democratic and egalitarian globalization, with a program that calls for transforming global economy by introducing limits and controls to the powers of the market, and subordinating them to the rights of individuals and peoples. He provides a few examples like the Tobin tax, the elimination of fiscal havens and the condoning of debt for poor countries, that is, the radicalization of democracy and social participation.[7]

[7] PISARELLO, *op. cit.* p. 12 and 13.

PARTICIPANT'S LIST

Argentina
Analía Aucía
Claudia Giacometti
Fátima Raquel Castillo
Alejandra Viviana Tolosa

Bolivia
María Cristina Martínez Ordoñez
María Edit Oviedo

Brazil
Rúbia Abs da Cruz
Thais Lapa
Ingrid Viana Leão

Colombia
Norma Enríquez Riascos
Milena Páramo Bernal
María Eugenia Ramírez

Chile
Marcela Alejandra Herrera Luque

Ecuador
María Gardenia Chávez
Sara Mansilla Novella
Delia Pamela Quishpe Caiza

El Salvador
Gladys Noemy Anaya Rubio
María Auxiliadora Rivas Serrano

España
Gaby Oré Aguilar

USA
Nelly Stromquist

Guatemala
Ana Silvia Monzón

Honduras
Pilar Josefina Euraque Martínez
Yadira Lizzeth Minero Rodas

Mexico
Patricia Socorro Bedolla Zamora
Violeta Fabiola Sánchez Luna
Ofelia Woo

Panama
Ana Teresa Ávila Rodríguez

Paraguay
María Limpia Díaz Ortega
María del Carmen Pompa Quiroz

Peru
Norma Adela Canales Rivera
Ana Cecilia Cosme Méndez
Teresa del Pilar de la Torre Salazar
Diana Carolina Portal Farfán
María Elena Reyes Meléndez
Inés Romero Bidegaray

Betsey Cecilia Valdivia López
Guiomar Vásquez Zamora
Roxana Vásquez Sotelo

Puerto Rico
Jacqueline Cruz Rodríguez

Dominican Republic
María del Mar Mella

Uruguay
Estela Mary de Armas Martínez
Alma Espino
Moriana Hernández Valentini
Mabel Elisa Simois Sandes

Discussing Globalization. Feminist Reflections
Priting of this CLADEM publication was completed
in March 2011
in Línea Andina SAC
Lima, Perú

This publication is one of the outcomes of the workshop *"Globalization and its effects on the lives of women"* that our organization conducted in October 2009, with the aim of providing us with more elements to analyze a multi-causal and complex phenomenon of enormous political relevance for our actions. Theoretical and political discussion on the issue is incomplete, and that is another reason why it is a fertile field for discussion.

Many of us speak and have taken positions on globalization, but what do we really understand as globalization and how much do we know of its effects on people's lives? This was one of the questions guiding our reflections and, in our understanding, it is still unanswered and remains as an unavoidable challenge. Answers – very likely partial and provisional – will always be welcome, particularly if they are the product of serious analysis based on tracking reality in its different dimensions, as those of many of the authors in this publication.

We hope that this material we are publishing today is interesting and useful for all those who, like us, are still determined to understand in a deeper way the courses and dimensions of the changes we are experiencing, as well as the weight and magnitude of the persistence of discriminatory and exclusionary conditions drawing us away from achieving a democratic environment in which welfare is a reality for all.

CLADEM

COMITÉ DE AMÉRICA LATINA Y EL CARIBE
PARA LA DEFENSA DE LOS DERECHOS DE LA MUJER

www.cladem.org

Development Cooperation
Ministry of Foreign Affairs