

**Untying the Knot in Work-Family Balance: Inequalities and  
Capabilities in Portugal and Spain**

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*The hardest task needs the lightest hand  
or else its completion will not lead to freedom  
but to a tyranny much worse than the one it replaces.*

Socrates

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# **Untying the Knot in Work-Family Balance: Inequalities and Capabilities in Portugal and Spain**

## **A Conciliação entre Trabalho e Família: Desigualdades e Capacidades em Portugal e Espanha**

**Edna Sofia Falorca da Costa**

### **ABSTRACT**

This dissertation is concerned with the study of work-family balance in Portugal and Spain between the early nineties and 2012. This topic has been at the centre of political and academic debate in recent decades as the share of families with two working adults and small children have significantly increased in Western societies. As a result, traditional strategies for the articulation of the work and the family spheres have been put in question and claims for more gender balanced options have become widespread.

In contrast with most west European countries, the Iberian democracies experienced the main transformations in the work and family spheres after a long period of right-wing authoritarian rule. This entails that changes occurred in opposition to the authoritarian legacy and alongside with the consolidation of similar civil, political, social and economic rights. Nonetheless, both countries do in fact present distinct patterns in work-family arrangements and this variation makes them a particularly relevant object of comparative research, still widely unexplored.

This study conceptualizes strategies for work-family balance and the gendered variation they entail within a capabilities-based approach, thus seeking to understand the extent to which real, unconstrained choice is equally available for women and men. In the study of work-family balance this translates as the freedom to choose between labour market participation and care, which are defined as equally valuable options. Empirically, this involves the analysis of factors that operate at the individual, institutional and cultural levels and which shape capabilities for balancing work and care. This dissertation argues that women's and men's choices are bound up with the real opportunities they have to choose and therefore gender inequalities in capabilities may correspond to similar inequalities in the division of labour.

Key findings show that globally the modernization of work-family arrangements between the early nineties and 2012 does correspond to a pattern of enhanced capabilities in the articulation of work and family in both countries. Notwithstanding, Spain displays greater imbalances in the division of work and care than the

neighbouring country which reflect weaker institutional resources, namely at the policy level. In the case of Portugal, more motherhood-centred cultural values do not seem to constrain the participation of both women and men in the labour market as it coexists with a high value attributed to paid work. This study further emphasizes that gender inequalities in both facets of the work-family nexus are still visible in Portugal as in Spain. Indeed, capabilities for balancing work and care are not similar for women and for men and this imbalance has become especially evident in the institutional factors that support it.

## RESUMO

A presente dissertação estuda a conciliação entre trabalho e família em Portugal e Espanha desde o início da década de noventa até 2012. Nas décadas mais recentes este tema tem estado no centro do debate político e académico perante o aumento significativo do número de famílias com filhos e com dois adultos ativos no mercado de trabalho. Como consequência, as estratégias tradicionais de articulação entre trabalho e família vêm sendo postas em causa e novas alternativas mais equilibradas em termos de género vêm sendo exigidas.

Ao contrário da maior parte dos países europeus, as democracias ibéricas conheceram as principais transformações nas esferas do trabalho e da família após um longo período de governo autoritário de direita. Daqui decorre que estas mudanças ocorreram em oposição aos legados autoritários ao mesmo tempo que se consolidavam direitos civis, políticos, económicos e sociais. Todavia, os dois países apresentam padrões distintos de combinação entre trabalho e família e esta variação torna-os um objeto de comparação particularmente relevante e ainda muito sub-explorado.

Este estudo conceptualiza as estratégias de conciliação e as respetivas variações de género a partir da abordagem das capacidades, procurando assim compreender em que medida uma escolha real e sem restrições é igualmente possível para mulheres e homens. No estudo da conciliação entre trabalho e família isto traduz-se na liberdade de escolha entre a participação no mercado de trabalho e a prestação de cuidados, sendo definidos enquanto opções com valor idêntico. Em termos empíricos, isto envolve a análise dos fatores que operam individuais, institucionais e culturais e que moldam as capacidades de conciliação. A presente dissertação argumenta que as escolhas de mulheres e homens estão ligadas às reais possibilidades de escolha que se lhes apresentam e, portanto, desigualdades de género ao nível das capacidades poderão corresponder a desigualdades na divisão do trabalho pago e não pago.

Os principais resultados mostram que, de uma forma geral, a modernização dos padrões de combinação entre trabalho e família no período de análise corresponde, de facto, a um padrão de capacidades mais elevadas em ambos os países. Contudo, Espanha apresenta maiores desigualdades de género na divisão do trabalho que o país vizinho, refletindo recursos institucionais mais fracos, nomeadamente ao nível das políticas de conciliação. No caso português, os valores culturais mais maternalistas não representam um impedimento à participação de mulheres e homens no mercado de trabalho, uma vez

que coexistem com uma forte valorização do trabalho pago. Este estudo vem ainda realçar a persistência das desigualdades de género nas esferas do trabalho e da família em ambos os países. Com efeito, as capacidades de conciliação não são semelhantes para as mulheres e para os homens e esta desigualdade é especialmente evidente nos fatores institucionais que as sustentam.

**KEYWORDS:** Work-Family Balance, Capability-Approach, Gender Equality, Reconciliation Policies, Job Quality, Gender Norms

**PALAVRAS-CHAVE:** Conciliação entre Trabalho e Família, Abordagem das Capacidades, Igualdade de Género, Políticas de Conciliação, Qualidade de Emprego, Normas de Género

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## Introduction

This dissertation is concerned with the study of work-family balance (WFB) in Portugal and Spain between the early nineties and 2012. This topic has been at the centre of political and academic debate in recent decades as the share of families with two working adults and small children have significantly increased in Western societies. As a result, traditional strategies for the articulation of the work and the family spheres have been put in question and claims for more gender balanced options have become critical. Despite the fact that the core transformations in work-family arrangements are common to most European countries, this study concentrates on how they have evolved in the Iberian context and on the extent to which they have been accompanied by changes in opportunities for WFB.

As stated, debates on WFB issues have become ubiquitous and transversal to different academic fields resulting in a low level of consensus concerning the meanings behind the term. This study is specifically interested on the practical strategies adopted by dual-earner families in order to articulate paid work and family tasks rather than on the subjective experiences of *balance*. As these strategies are reflected in varying paid and unpaid workloads for women and men, a gender perspective is crucial to the investigation. Furthermore, it also emphasizes the ambivalences regarding the meanings of *work* and *family* which are frequently introduced as representing two distinct life spheres. However, the conceptual and practical boundaries between them have become extremely blurred during the last decades in a context of valuation of unpaid domestic and care work done in the home. In fact, transformations in the work-family axis have been pervasive not only in the practicalities of daily lives but also at the conceptual level.

The progressive transition to post-industrial societies that took place in Europe during the second half of the XX century was accompanied by an important set of changes at different levels. Family structures became more flexible as marriage and childbearing decisions were delayed with the consequence of lowering fertility levels. Women's role as wives and mothers lost its centrality as they became increasingly independent from the male figure – husband, father or brother. Their integration in the labour market and their increasing autonomy have potentially been one the main drivers of transformations in families and in employment during this period. Ideologically, this

was underpinned by the search of new meanings for the democratic value of equality in the sixties and seventies disseminated by second-wave feminisms and reflected in third-wave democratization processes.

Despite national variations, European households have departed from a strict division of women's and men's roles, respectively, as carers and earners and progressed towards a model of sharing of the breadwinning role, albeit with different nuances. However, the role of the female carer has proved much more resistant to change as the persistence of deep inequalities in the division of domestic and care tasks clearly indicate. From the perspective of work-family balance, the higher employment levels of women associated with a disproportionate involvement of men in care tasks result in two main issues: women's double burden and the care gap. While the first underscores that women in dual-earner households generally work a "double shift", adding domestic tasks to the hours in formal employment, the latter calls attention to gap in the provision of care that results from this same participation in the labour market. Indeed, the coincidence of the most demanding career and family years have undoubtedly increased the pressure on European families to juggle time demands in both spheres and has therefore brought to the forefront the work-family equation.

In contrast with most west European countries, the Iberian democracies experienced the main transformations in work-family arrangements after a long period of right-wing authoritarian rule. This entails that changes in the work and family spheres occurred in opposition to the authoritarian legacy and at the same time with the consolidation of civil, political, social and economic rights. This will prove to be extremely relevant in the analysis of gender roles and of the institutional and cultural conditions which underpin them.

The main empirical puzzle driving this investigation is thus the persistence of gender imbalances in the division of labour in a context of formally equal rights and of modernization of gender cultures in Iberia. Accordingly, this dissertation aims at investigating opportunities for WFB in Portugal and Spain and the extent to which they are associated with actual work-family arrangements, within the purview of enduring gender inequalities in the division of labour. To that end, it intends to provide answers to three groups of questions which stem from the interrelated set of transformations explored above.

Firstly, it addresses the different facets of WFB in the selected cases and poses the following questions: how have models of work-family articulation progressed in Portugal and Spain between the early nineties and 2012? To what extent have male breadwinner/female carer patterns transitioned to similar dual-earner models? How gendered is the division of work and family responsibilities? In order to link perceived alternatives with actual outcomes one further interrogation is put forward: how satisfied are women and men with the achieved work-family arrangement?

Next, the investigation addresses the factors associated with changes in work-family arrangements in Portugal and Spain with the aim of determining the different combinations of paid and unpaid family work at the disposal of women and men. It therefore concentrates on the viable options for work-family balance by posing the following questions: how have opportunities for work-family balance in Portugal and Spain evolved during the period of analysis? And, most importantly, to what extent have they developed equally for women and men? To that end, circumstances of support and constraint must be examined taking into account their multi-dimensional nature - institutional and cultural – as well as their interaction. Hence, the following interrogations: which institutional and cultural factors supported or constrained opportunities for WFB? Furthermore, have they stood in tension or agreement with each other?

The final questions report to the relation between the structures of opportunities for WFB and patterns of work-family arrangements thus directly addressing the main puzzle behind this dissertation: the persistence of imbalances in the gendered division of labour. In that sense, it asks whether options for balancing work and family are associated or can even anticipate effective outcomes in paid and unpaid workloads for women and men. This dissertation ultimately proposes that equality in opportunities for articulating employment and unpaid family work does contribute to a more balanced gender division of paid and unpaid work and, to that end, the consideration of the broad institutional and cultural contexts are fundamental.

Theoretical approaches to the gender division of labour originate from different academic fields, as political science, sociology or economics and have fuelled considerable discussion throughout the last decades. These theories are commonly divided into those emphasizing the role of choice and human capital and those arguing for the centrality of external factors that determine the distribution of work and care in

the household. In recent decades, research has undergone considerable development in an attempt to overcome tensions between these approaches resulting in the rethinking of the work-family equation.

The theoretical perspective followed in this dissertation draws inspiration from Amartya Sen's capability-approach (CA) which, in some dimensions, manages to reconcile theories of agency and constraint. Fundamentally, its main normative goal is the freedom to achieve the life one wants to live or in other words to pursue the life goals one values, according to democratic rules. This is also applied to groups of individuals and takes into consideration their situated agency, that is, their particular context, which makes it particularly adequate to the study of gender inequalities. Indeed, women's and men's choices are bound up with the real opportunities available to them. In the study of work-family balance this translates as the freedom to choose between labour market participation and care, which are defined as equally valuable options. In contrast with resources-based theories, as those focusing on human capital factors, the CA holds that these do not possess any intrinsic value as they may or may not represent viable life options. Their potential thus depends on the particular context of women and men as defined by the set of conversion factors at work.

The priority given to the act of choice and the circumstances that surround it calls for a clear distinction between the two core concepts of the CA: functionings and capabilities. Whereas the first is associated with achieved living conditions - the end results -, the latter speaks to the real opportunities to achieve - the available options -. In this dissertation this distinction is formulated as the difference between the actual distribution of work and care in the household – work-family arrangements – and the alternative combinations of both available to women and men – capabilities for WFB -. Sen's original approach brings capabilities to centre stage, making them the normative anchor for assessing human well-being. Its adaptation to the field of work and family maintains this principle and instead of presuming there is an ideal division of work and care that suits all working parents, it supports the maximization of choices in relation to paid and unpaid work. Despite being closely intertwined, functionings do not equate capabilities as the realm of options available to women and men are shaped by multi-dimensional conversion factors at the individual, institutional and cultural levels.

In the context of this dissertation, this involves the analysis of reconciliation policies, labour markets and gender norms with the aim of determining where barriers

and incentives for WFB lay. Specifically, it analyses a set of policy instruments which hold the power to open or close different work-family options for women and men, namely: parental leaves, the provision of childcare services and tax incentives to childcare. However, institutional conversion factors also encompass specific labour market features as occupational segregation levels, gender differences in remuneration and the flexibility of working times. Additionally, the set of alternatives for WFB made possible by institutional contexts is also influenced by the prevailing gender norms on work and family as they shape expectations on the distribution of work and care in the household and simultaneously also impinge on the policy level. The interaction among conversion factors is consequently central to this study as it provides the background for how decisions on work-family arrangements are made.

The consequent expansion or restriction of capability sets will therefore influence equality in the options available for WFB and, subsequently, in work-family arrangements. Notwithstanding the central distinction between functionings and capabilities, women's and men's choices are bound up with the real opportunities they have to choose and therefore gender inequalities in capabilities may correspond to similar inequalities in the division of labour. Empirically, this implies that the larger the inequalities in capabilities, the larger the inequalities in achieved functionings.

According to the theoretical model presented above, capability sets for WFB constitute the explanatory variables of this study. However, in order to assess the full range of opportunities open to women and men in the selected cases, the combination of institutional and cultural conversion factors must be examined according to two main criteria: whether they enable care work both in formal settings and in the home, rewarding it accordingly, and whether they enable paid work, ensuring the access to quality jobs. In this sense, the following conditions are expected contribute to enhanced capability sets for WFB: the existence of paid parental leaves available to the mother and, particularly, paid paternity leaves reserved to the father; the availability of affordable and quality childcare services and the existence of tax incentives towards the use of formal childcare; low levels of occupational segregation of the labour market; low gender gaps in remunerations for equal work; the existence of flexible working times and the prevalence of modern values towards gender roles in work and in the family. From here, capability sets of Portuguese and Spanish women and men will be

derived and their potential relation with patterns of work-family arrangements in both countries will be determined.

The comparative relevance of the two Iberian countries, Portugal and Spain, is still widely unexplored, especially in the field of work-family balance. They indeed share important characteristics that speak to the evolution of gender roles in work and in the family specifically. They are both third-wave democracies which have transitioned from long authoritarian regimes in the mid-seventies and integrated the European Union in the mid-eighties, thus acquiring identical democratic rights. The idea of social citizenship, specifically, has been instrumental during democratic transitions in Iberia in exposing and dismantling inequalities inherited from the previous regimes. The strong role played by the Catholic Church in both Portuguese and Spanish dictatorships is mirrored in two central aspects to this study: on the one hand, the strict patriarchal view on gender roles and hence on the gender division of labour and, on the other hand, the commitment to the principle of subsidiarity, that is, to the primary role of the family in matters of care and social protection. Furthermore, both have undergone a process of late and state-assisted industrialization and signs of economic development in more recent decades were mainly due to the development of the service sector.

Notwithstanding the fact that during the second half of the XX century most Western societies have in fact transitioned from a traditional model of division of labour to more equitable WFB strategies, there is a need for further research on the particular paths of evolution that lie beneath these processes. Indeed, important and sometimes radical differences between the two neighbouring countries have gone largely unnoticed by large-scale comparative studies as despite shared historical, political, economic and cultural backgrounds the two countries in fact present distinct patterns of employment and care and thus face distinct challenges in the articulation of work and family. Empirical evidence sustains the need for further research as they anticipate distinctive drivers of gender inequalities in WFB and, more specifically, different options available to Portuguese and Spanish women and men.

The selected timeframe for this research spans from the early nineties to 2012, given that the most significant policy changes regarding the work-family dimension in both countries occurred during this period. Most importantly, it allows for the maximization of variation in outcomes while maintaining while maintaining key scope conditions. Indeed, by the mid-eighties both countries were consolidated democracies

with restored political stability, liberal open market economies and effective welfare institutions. Also, in 1986 both became part of the European Economic Community (EEC), a key event in the completion of the democratic consolidation. The timeframe also directly addresses the economic recession context which encompasses the financial sector crisis in 2007 and the resulting sovereign debts crisis which followed in 2010 and hit south European countries especially hard. This has been indeed a context of major transformations, with significant advances and returns in reconciliation policies and job quality, which therefore plays a decisive role in enlightening changing opportunities for WFB and ensuing work-family arrangements in both countries.

In order to assess this particular universe of functionings and capabilities for work-family balance, the study combines institutional and survey analysis with historical and cultural insights. It thus entails statistical analysis based on longitudinal survey data as well as the analysis of secondary literature in both evaluative spaces. Accordingly, results on work-family arrangements combine data on the distribution of paid and unpaid work as well as on satisfaction levels thus linking perceived alternatives with the goals actually achieved. Gendered patterns of paid and unpaid work will be derived from the EU Labour Force Survey (LFS) and the European Quality of Life Survey (EQLS), respectively. Data on satisfactions levels is provided by the European Social Survey (ESS).

As argued, the CA also provides a normative framework for evaluating reconciliation policies focusing on the dimensions of time as well as money or services. While information on the length and retribution levels of parental leaves comes from the OECD Family Database, the availability of formal childcare services will be analysed according to data from the EU – Survey on Income and Living Conditions (SILC). Complementary information on the types and quality of childcare services is derived from specific literature on social and family policies. In addition to that, the OECD Benefits and Wages datasets will be used to determine specific childcare tax-benefit schemes. Reconciliation policies interplay with other institutional conversion factors, namely with those related to the quality of jobs. Therefore, variables as the flexibility of working times and the gender pay gap will be assessed based on data from the EU-LFS. Comparative data sources on occupational segregation levels are less straightforward but this difficulty is overcome by combining the IP-index with a tripartite classification of occupations. Finally, the cultural dimension is taken into consideration and gender

attitudes towards work and family are assessed from information in the International Social Survey Programme and the ESS. As stated, throughout the whole study descriptive statistics are complemented with the analysis of secondary literature and that is also the case with gender norms, where historical and cultural insights will be of central interest.

The structure of this dissertation approximately follows the research goals set out in this introduction. Chapter I starts by contextualizing the object of study - work-family balance - in the European framework and illustrating how it became a central political issue. Further, it introduces the cases for analysis, Portugal and Spain, and highlights their distinct paths of evolution and challenges regarding the articulation of work and family tasks. Next, it identifies and clarifies the concepts which will support the analysis and puts forward the research questions. Section I.3 summarizes the existing work in this field and argues how this dissertation contributes to the advancement of knowledge at the theoretical, methodological and empirical levels. The following section addresses the different theoretical approaches that have accounted for strategies of work-family articulation as well as their main limitations. Chapter II lays the theoretical and methodological grounds for this dissertation. It argues why the Capability Approach is a suitable theoretical instrument to the analysis of WFB and how it overcomes the barriers of the classical agency and constraint debate. Further, it proceeds to the operationalization of the capability-based analysis and puts forward the main hypotheses. The last section sets out the methodological framework. It starts with an outline of the comparative method which underpins the whole investigation, followed by the case selection strategy, the most similar systems design, and closes with an introduction to the data.

Chapter III moves to the empirical part of the dissertation and analyses the visible aspects of WFB in the selected cases, namely patterns of employment and unpaid work as well as satisfaction with these arrangements. The empirical analysis is preceded by a concise historical context which mainly accounts for the legacies of the authoritarian regimes and of the periods of democratic transition on the gendered patterns of division of labour. Finally, it takes a comparative view of the main empirical findings.

Chapter IV is the first of three chapters dedicated to the analysis of the multi-level opportunities and constraints that shape women's and men's options for WFB, in

other words, their capability set. The CA explicitly underlines the role of policies in facilitating free choice through the removal of barriers and the active support of alternative options for WFB. After setting out the major legislative turning points on reconciliation, this chapter assesses three specific policies that mediate the work-family relationship: parental leaves, childcare services and the corresponding tax-benefit schemes. It closes with a section on the chapter's key findings. Chapter V addresses another set of institutional factors which are, in turn, related to the labour market and job quality. First, a brief issue history is presented. The chapter then goes on to its main goal: the analyses of occupational segregation levels, gender pay gaps and flexibility of working times bringing again the issue of time as well as money to the fore. Finally, it summarizes the main results. Chapter VI is concerned with the cultural context in which choices for WFB are made. In particular, it is interested in the prevailing gender norms that can influence women's and men's options regarding the amount of time they devote to paid and unpaid work. It begins by setting out a short historical context accounting for the development of gender cultures in Iberia and then goes on to the empirical analysis of attitudes on the gender division of labour. As the previous chapters, it closes with a section on key findings.

Chapter VII has two fundamental tasks which bring together the previous chapters: to derive capabilities for WFB from the interplay among institutional and cultural conversion factors and further to determine whether they can predict patterns of work-family arrangements. Accordingly, it starts by assessing the full range of work-family combinations open to women and men in Iberia throughout the complete period of analysis. Then, it carries out a more concise comparison of the key similarities and differences in capability sets in the two countries. Next, it recovers the investigation's main research question: the extent to which capabilities for WFB are indeed related to the actual functionings or, in other words, outcomes in employment and care. It thus brings together and interprets the previous chapters' results against the dissertation's theoretical framework. Finally, the concluding chapter reiterates the study's theoretical and methodological grounds as well as the key research questions. It then goes on to highlighting the main analytical conclusions along with their implications for theory advancement. It closes with the dissertation's most relevant limitations and pitfalls as well as paths for future research.

## Introdução

A presente dissertação estuda a conciliação entre trabalho e família (CTF) em Portugal e Espanha desde o início da década de noventa até 2012. Nas décadas mais recentes este tema tem estado no centro do debate político e académico perante o aumento significativo do número de famílias com filhos e com dois adultos ativos no mercado de trabalho. Como consequência, as estratégias tradicionais de articulação entre trabalho e família são postas em causa e novas alternativas mais equilibradas em termos de género são exigidas. Apesar dos padrões principais de combinação entre trabalho e família serem comuns à maioria dos países europeus, este estudo concentra-se na sua evolução específica no contexto ibérico e na medida em que estes foram acompanhados por mudanças nas respetivas oportunidades para a conciliação.

Com efeito, os debates sobre questões de CTF tornaram-se omnipresentes e transversais a diferentes áreas académicas resultando num baixo nível de consenso relativamente aos significados abarcados por este conceito. Este estudo tem especial interesse nas estratégias práticas adotadas por famílias de duplo-provedor tendo em vista a articulação do emprego com a prestação de cuidados na família, e não nas experiências subjetivas de equilíbrio de daí advêm. A adoção de uma perspetiva de género é essencial nesta investigação, uma vez que as estratégias de conciliação resultam em cargas distintas de trabalho pago e não pago para as mulheres e para os homens. Para além disso, também são realçadas as ambivalências nos conceitos de *trabalho* e *família*, frequentemente apresentados como respeitantes a duas dimensões opostas da vida. Na verdade, os limites conceptuais e práticos entre os dois têm-se tornado muito esbatidos nas últimas décadas num contexto de valorização do trabalho não pago realizado na esfera doméstica. Com efeito, as transformações no eixo trabalho-família refletem-se não só nos aspetos práticos do quotidiano mas também a nível conceptual.

A transição progressiva para sociedades pós-industriais que ocorreu na Europa na segunda metade do século XX foi acompanhada por um conjunto importante de mudanças a diferentes níveis. As estruturas familiares tornaram-se mais flexíveis num contexto de adiamento do casamento e da decisão de ter filhos, reduzindo os níveis de natalidade. O papel da mulher enquanto esposa e mãe perdeu a sua centralidade à medida que esta se tornava cada vez mais independente da figura masculina – marido,

pai ou irmão. A sua integração no mercado de trabalho e a sua crescente autonomia foram, potencialmente, um dos principais condutores das transformações nas famílias e no emprego durante este período. Em termos ideológicos, estas mudanças foram sustentadas por uma busca de novos significados para o valor democrático da igualdade durante os anos sessenta e setenta disseminada pelos feminismos de segunda vaga espelhada nos processos de democratização de terceira vaga.

Apesar das variações ao nível nacional, os agregados familiares europeus partiram de uma divisão rígida dos papéis de mulheres e homens enquanto cuidadoras e provedores, respetivamente, e progrediram para diferentes modelos de partilha do papel de provedor. Contudo, o papel da mulher enquanto cuidadora tem-se revelado muito mais resistente à mudança tal como comprovado pelas desigualdades persistentes na partilha das tarefas domésticas e de prestação de cuidados. Da perspetiva da CTF, o aumento do emprego feminino associado à participação desproporcional do homem na prestação de cuidados reflete-se em duas questões principais: a dupla carga de trabalho feminina e o *gap* na prestação de cuidados. Enquanto a primeira realça que as mulheres em agregados de duplo provedor geralmente trabalham um turno duplo, somando as tarefas domésticas ao emprego formal, a segunda chama a atenção para o *gap* na prestação de cuidados que resulta dessa mesma participação feminina no mercado de trabalho. Com efeito, a simultaneidade dos anos mais exigentes aos níveis familiar e profissional resultou num aumento de pressão na gestão do tempo em ambas as dimensões e trouxe, assim, para o centro do debate, a conciliação entre trabalho e família.

Ao contrário da maior parte dos países europeus, as democracias ibéricas conheceram as principais transformações nas esferas do trabalho e da família após um longo período de governo autoritário de direita. Daqui decorre que estas mudanças ocorreram em oposição aos legados autoritários ao mesmo tempo que se consolidavam direitos civis, políticos, económicos e sociais. Este contexto irá revelar-se extremamente relevante na análise dos papéis de género e das condições institucionais e culturais que os sustentam.

A questão principal que conduz esta investigação é, assim, a persistência de desequilíbrios na divisão do trabalho num contexto de igualdade formal de direitos e de modernização das culturas de género em Portugal e em Espanha. Assim, a presente dissertação procura analisar as oportunidades de conciliação em ambos os países e a

medida em que estes estão associados com os padrões efetivos de combinação entre trabalho e família, num contexto de desigualdades de género persistentes na divisão do trabalho. Nesse sentido, tenciona dar resposta a três grupos de questões que derivam do conjunto de transformações acima descrito.

Em primeiro lugar, são exploradas as diferentes facetas da CTF dando resposta às seguintes questões: de que forma progrediram os modelos de articulação entre trabalho e família em Portugal e Espanha entre a década de noventa e 2012? Em que medida os modelos tradicionais de homem-provedor/mulher-cuidadora se transformaram em modelos de duplo-provedor semelhantes? Qual o papel do género na divisão do trabalho pago e não pago? De forma a associar as alternativas percecionadas com os resultados efetivos uma questão adicional é colocada: qual o nível de satisfação de mulheres e homens com os padrões de conciliação atingidos?

Em seguida, o estudo discute os fatores associados às mudanças nos padrões de conciliação entre trabalho e família em Portugal e Espanha com o objetivo de determinar quais as diferentes combinações de trabalho pago e não pago estão à disposição de mulheres e de homens. Assim, concentra-se nas opções viáveis de conciliação colocando as seguintes questões: de que forma evoluíram as oportunidades de conciliação entre trabalho e família em ambos os países durante o período de análise? E, adicionalmente, em que medida se desenvolveram de forma igual para mulheres e homens? Nesse sentido, são examinadas as circunstâncias de apoio e de restrição tendo em conta a sua natureza multi-dimensional – institucional e cultural – bem como a sua interação. Daqui derivam as seguintes interrogações: quais os fatores institucionais e culturais que apoiam e restringem as oportunidades de conciliação? Para além disso, estão em tensão ou harmonia entre si?

A questão final aborda a relação entre as estruturas de oportunidade e os padrões de combinação entre trabalho e família e, concomitantemente, explora o puzzle empírico na base desta dissertação: a persistência de desigualdades de género na divisão do trabalho. Nesse sentido, questiona se as opções de conciliação estão associadas ou se podem antecipar os padrões efetivos de combinação de trabalho e família para mulheres e homens. Em última instância, esta dissertação propõe que a igualdade de oportunidades na articulação do emprego com a prestação de cuidados contribui para uma divisão de trabalho pago e não pago mais equilibrada e, para tal, é fundamental a consideração dos contextos institucional e cultural.

As abordagens teóricas à divisão do trabalho em termos de género partem de vários campos académicos tais como a ciência política, a sociologia ou a economia e têm alimentado um debate intenso nas últimas décadas. Estas teorias são comumente divididas entre as que realçam o papel da escolha racional e do capital humano e aquelas que se focam na importância dos fatores externos que determina a distribuição do trabalho pago e não pago nas famílias. Recentemente, a investigação académica tem vindo a repensar a equação trabalho-família numa tentativa de ultrapassar as tensões entre estas duas abordagens.

A perspetiva teórica seguida nesta dissertação inspira-se na abordagem das capacidades (AC) de Amartya Sen que, em algumas dimensões, consegue reconciliar as teorias da ação e as estruturalistas. Fundamentalmente, o seu principal objetivo normativo é a liberdade de atingir a vida que cada um quer viver ou, por outras palavras, poder alcançar os objetivos de vida que cada um mais valoriza, de acordo com as regras democráticas. Este princípio é igualmente aplicado a grupos sociais e tem em conta a sua ação situada, ou seja, o seu contexto particular, facto que o torna especialmente adequado ao estudo das desigualdades de género. De facto, as escolhas de mulheres e homens estão ligadas às reais possibilidades que se lhes apresentam. No estudo da CTF isto traduz-se na liberdade de escolha entre a participação no mercado de trabalho e a prestação de cuidados, sendo definidos enquanto opções com valor idêntico. Ao contrário de outras teorias baseadas nos recursos individuais, tais como as que focam fatores de capital humano, a AC sustenta que os recursos não têm qualquer valor em si mesmo pois podem representar ou não opções de vida viáveis. O seu potencial depende, de facto, no contexto particular de mulheres e homens definido por um conjunto de fatores de conversão.

A prioridade atribuída ao ato da escolha bem como às circunstâncias que o rodeiam exige uma distinção clara entre os dois conceitos centrais da AC: funcionalidades e capacidades. Enquanto o primeiro se refere às condições de vida efetivamente atingidas – o resultado final – o último relaciona-se com as oportunidades reais para as atingir – as opções disponíveis -. Nesta dissertação, esta distinção é formulada enquanto a diferença entre a efetiva distribuição de emprego e prestação de cuidados no agregado familiar – a combinação entre trabalho e família – e as opções disponíveis para mulheres e homens – as capacidades de conciliação -. A abordagem de Sen coloca o foco principal nas capacidades, a âncora normativa para a avaliação do

bem-estar humano. A sua adaptação ao campo do trabalho e da família mantem este princípio e, em vez de presumir que existe uma divisão ideal de trabalho pago e não pago que se aplica a todas as mães e pais trabalhadores, defende a maximização de escolhas em relação a ambas as dimensões. Apesar de estarem fortemente ligadas, as funcionalidades não são semelhantes às capacidades uma vez que o conjunto de opções disponíveis é moldado por fatores de conversão multi-dimensionais que operam aos níveis individual, institucional e cultural.

No contexto da presente dissertação, este modelo implica a análise de políticas de conciliação, de mercados de trabalho e de normas de género tendo em vista identificar as barreiras e os incentivos à CTF. Especificamente, esta análise aplica-se a um grupo de instrumentos que têm o poder de abrir ou fechar opções de conciliação para mulheres e homens, nomeadamente: políticas de licença parental, serviços de guarda de crianças e benefícios e incentivos fiscais relativos à utilização desses serviços. Contudo, os fatores de conversão institucionais englobam ainda características específicas do mercado de trabalho tais como: o nível de segregação ocupacional, disparidades salariais de género e flexibilidade do horário de trabalho. Adicionalmente, o conjunto de opções de conciliação viabilizadas pelos fatores institucionais é também influenciado pelas normas de género prevalentes ao nível das expectativas relativas à distribuição do trabalho pago e não pago e que também influem as políticas adotadas. Com efeito, a interação entre os fatores de conversão é central neste estudo enquanto contexto no qual as escolhas entre trabalho e família são realizadas.

Assim, a expansão ou restrição das capacidades irá influenciar o nível de igualdade nas opções de conciliação e, conseqüentemente, nos padrões efetivos de combinação entre trabalho e família. Apesar da distinção entre funcionalidades e capacidades, elas estão fortemente ligadas e, como tal, as escolhas de mulheres e homens estão ligadas às opções reais de escolha existentes, isto é, desigualdades de género nas capacidades podem corresponder a desigualdades de género semelhantes na divisão do trabalho. Empiricamente, implica que quanto maiores as desigualdades de género nas capacidades, maiores as desigualdades nas funcionalidades atingidas.

De acordo com o modelo apresentado, as capacidades de conciliação constituem a variável independente deste estudo. No entanto, a avaliação do conjunto total de oportunidades abertas a mulheres e homens requiere a análise dos fatores institucionais e culturais de acordo com dois critérios fundamentais: em que medida permitem a

prestação de cuidados em contexto formal e informal, com a retribuição financeira respetiva, e de que forma permitem o trabalho pago, garantido a qualidade dos empregos. Neste sentido, um conjunto alargado de capacidades de conciliação depende de: existência de licenças parentais pagas disponíveis para a mãe e reservadas para o pai, a disponibilidade de serviços de guarda de crianças acessíveis e de qualidade e ainda a existência de benefícios e incentivos fiscais à utilização destes serviços, baixos níveis de segregação ocupacional do mercado de trabalho, disparidades salariais de género reduzidas, horários de trabalho flexíveis e a prevalência de valores de género modernos em relação à divisão do trabalho pago e não pago. A partir daqui resultarão os conjuntos de capacidades de mulheres e homens portugueses e espanhóis e será determinada a sua relação com os padrões de combinação entre trabalho e família em ambos os países.

A relevância comparativa dos dois países ibéricos encontra-se ainda muito sub-explorada em especial no campo da conciliação. Com efeito, ambos os países partilham características importantes que se relacionam diretamente com a evolução dos papéis de género no trabalho e na família. Ambos são democracias de terceira vaga que transitaram de longos períodos de governo autoritário em meados da década de setenta e aderiram à União Europeia na década seguinte, adquirindo direitos democráticos semelhantes. A ideia de cidadania social, em especial, foi instrumental nas transições democráticas ibéricas expondo e desmantelando as desigualdades herdadas dos regimes que as precederam. Além disso, o importante papel desempenhado pela Igreja Católica nas ditaduras portuguesa e espanhola reflete-se em dois aspetos centrais deste estudo: por um lado, na visão rígida sobre os papéis de género e a divisão do trabalho e, por outro, no compromisso com o princípio da subsidiariedade, isto é, na família enquanto prestadora de cuidados e proteção de primeira linha. Ambos os países atravessaram ainda um período de industrialização tardia e apoiada pelo Estado enquanto o desenvolvimento económico se apoiou principalmente no setor dos serviços.

Apesar do fato de, durante a segunda metade do século XX a maioria das sociedades ocidentais terem progredido de um modelo tradicional de divisão do trabalho para estratégias de conciliação mais equilibradas em termos de género, é premente um estudo mais aprofundado dos trajetos de evolução particulares que subjazem a este processo. Com efeito, os estudos comparativos de grande escala frequentemente não levam em consideração diferenças importantes e até radicais entre os dois países.

Apesar de partilharem contextos históricos, políticos, económicos e culturais ambos apresentam padrões de combinação divergentes entre trabalho e família e enfrentam, assim, desafios distintos ao nível da conciliação. Dados empíricos preliminares sustentam a necessidade de um estudo mais aprofundado antecipando fatores distintos na formação de desigualdades de género na CTF e, mais especificamente, nas diferentes opções disponíveis para mulheres e homens.

Este estudo reporta-se ao período entre o início da década de noventa e 2012 dado que a maioria das inovações políticas no âmbito da conciliação ocorreu neste período. Acresce ainda que o período selecionado permite a maximização da variação nos resultados mantendo porém condições contextuais importantes. Com efeito, em meados de década de oitenta ambos os países eram já democracias consolidadas, com estabilidade política, economias de mercado liberais e abertas e instituições de *welfare* estabelecidas. Ambos acederam à Comunidade Económica Europeia (CEE) em 1986, um evento chave no processo de consolidação democrática. O período selecionado aborda ainda o contexto de recessão económica que engloba a crise do setor financeiro de 2007 e a subsequente crise da dívida soberana em 2010 que atingiu de forma particularmente dura os países do sul da Europa. Este foi, de facto, um contexto de transformações importantes, com vários avanços e retrocessos nas políticas de conciliação e na qualidade dos empregos e que, por todas estas razões, constitui uma base apropriada para o estudo das oportunidades de conciliação e dos daí decorrentes padrões de combinação entre trabalho e família.

No estudo deste universo particular de funcionalidades e capacidades, a presente dissertação combina a análise institucional e estatística com visões históricas e culturais. Nesse sentido, leva a cabo análises estatísticas com base em dados longitudinais e recorre a literatura secundária no âmbito do trabalho e da família. Assim, os resultados relativos aos padrões de conciliação combinam dados relativos à distribuição do trabalho pago e não pago bem como à satisfação com estes padrões de conciliação. As fontes utilizadas serão a EU Labour Force Survey (LFS), a European Quality of Life Survey (EQLS) e a European Social Survey (ESS).

Tal como já mencionado, a moldura de análise da AC implica a avaliação de critérios de tempo bem como de retribuição financeira e de provisão de serviços. A informação referente às licenças parentais será recolhida da Family Database da OCDE, os serviços de guarda de crianças são examinados a partir da EU Survey on Income and

Living Conditions (SILC) e os respetivos benefícios e incentivos fiscais derivam do Benefits and Wages Dataset da OCDE. Em relação à qualidade do emprego, os indicadores sobre disparidades salariais de género e flexibilidade dos horários de trabalho derivam da EU-LFS. Já a avaliação do nível de segregação ocupacional combina dois indicadores, o IP-index e uma classificação ocupacional tripartida. Por último, os fatores culturais são analisados tendo em conta as atitudes de género em relação ao trabalho e à família que derivam do International Social Survey Programme e da ESS. Em todo o estudo, os dados estatísticos são complementados com a análise de literatura secundária.

A estrutura desta dissertação segue aproximadamente os objetivos de pesquisa apresentados nesta introdução. O capítulo I localiza o objeto de estudo – a conciliação entre trabalho e família – no contexto europeu e de que forma se transformou numa questão política relevante. De seguida, apresenta os casos selecionados, Portugal e Espanha, e realça os seus trajetos de evolução e desafios distintos no âmbito da conciliação. Identifica ainda os conceitos principais que baseiam o estudo e introduz as perguntas de investigação. A secção I.3 sumariza os trabalhos existentes neste campo de estudo e sublinha o contributo da presente dissertação para o avanço do conhecimento aos níveis teórico, metodológico e empírico. A secção seguinte explora as diferentes abordagens teóricas à CTF bem como as suas principais limitações. O capítulo II apresenta os pilares teóricos e metodológicos da dissertação, justificando a escolha da AC na análise da CTF enquanto alternativa às teorias da ação e estruturalistas. Procede ainda à sua operacionalização e apresenta as hipóteses principais. A secção final apresenta a moldura metodológica, isto é, a utilização do método comparativo, do *most similar systems design* e introduz ainda os dados utilizados.

O capítulo III inaugura a parte empírica da dissertação através da análise dos aspetos visíveis da CTF nos casos selecionados, nomeadamente os padrões de emprego e de trabalho não pago, bem como os níveis de satisfação com estes resultados. Esta análise é precedida de uma breve contextualização histórica que salienta a relevância dos legados autoritários e das transições democráticas em ambos os países. Por fim, analisa comparativamente os principais resultados empíricos.

No capítulo IV é analisado o primeiro conjunto de fatores que determinam as capacidades de conciliação. A AC sublinha o papel das políticas no desenvolvimento das capacidades através da remoção de barreiras mas também do apoio ativo a

alternativas viáveis de CTF. Após uma apresentação dos principais avanços legislativos no domínio da conciliação, este capítulo analisa três políticas específicas: a política de licença parental, a provisão de serviços de guarda de crianças e os benefícios e incentivos fiscais correspondentes. Um resumo dos principais resultados empíricos encerra o capítulo IV bem como os próximos dois capítulos. O capítulo V aborda os fatores relacionados com o mercado de trabalho e a qualidade do emprego. Após um breve contexto histórico são analisados os três fatores selecionados: o nível de segregação ocupacional, a disparidade salarial de género e a flexibilidade dos horários de trabalho. O capítulo seguinte dedica-se aos fatores culturais e, em particular, às normas de género que moldam as opções de mulheres e homens relativamente ao tempo dedicado ao emprego e às responsabilidades familiares. Após uma introdução que aborda o desenvolvimento da cultura de género nos países ibéricos, analisa as atitudes de género relativas à divisão de trabalho pago e não pago.

No capítulo VII cumprem-se duas tarefas fundamentais nesta dissertação: derivam-se as capacidades de conciliação a partir da análise dos três capítulos anteriores e determina-se a medida em que eles podem antecipar padrões de combinação entre trabalho e família. Assim, o capítulo começa por analisar o conjunto total de opções disponíveis a mulheres e a homens durante o período de análise. De seguida, analisa de uma forma mais detalhada as principais semelhanças e diferenças ao nível das capacidades nos dois países. A secção VII.2 regressa à questão central desta dissertação: em que medida as capacidades de CTF estão de facto relacionadas com os resultados na divisão do trabalho pago e não pago. Recupera, assim, os resultados empíricos dos capítulos anteriores (III-VI) interpretando-as à luz da moldura teórica da AC. Por fim, o capítulo relativo às conclusões reitera os pilares teóricos e metodológicos da dissertação bem como as perguntas de investigação. De seguida, salienta os principais resultados empíricos bem como as suas implicações teóricas. Encerra com a consideração das limitações mais relevantes do estudo e dos caminhos futuros de investigação.

## **Chapter I - Object of Study and State of the Art**

### **Introduction**

This study addresses opportunities for work-family balance (WFB) in Portugal and Spain between the early nineties and 2012 and seeks to determine their influence on gendered patterns of paid and unpaid work in the household. Chapter I is divided in seven sections: it firstly addresses the object of study and its relevance as well as the role it plays in the selected cases. The central concepts to this study are clarified and the main research questions are put forward. Section 2 highlights the contributions of the research and its innovative nature against the body of previous work which has investigated work-family arrangements particularly in the Iberian cases. The main theoretical approaches which have attempted to explain this problem are then presented in section 3 as well as their challenges and limitations.

### **1. Work-Family Balance – framing and definitions**

The issue of WFB, which is the main topic of this thesis, has been at the centre of discussion during the last decades, be it in popular press, in political discourse or in academic debates. It is frequently posed as one of the most desirable goals for families in western societies, yet one of the most difficult to achieve. Further, its identification with well-being and quality of life has reinforced its status as a common buzzword in political debates. In popular press, gender inequalities in WFB come to the fore and fuel extensive debates among writers, entrepreneurs and politicians (Slaughter 2012, 2016; Sandberg and Scovell 2017 among others). Nonetheless, despite extensive discussion there is small consensus regarding the meaning behind WFB and this section will therefore address the different ideas it entails. But firstly it is paramount to consider the overlapping social, political and economic transformations that underlie the demands for WFB in contemporary Western societies.

## 1.1. Transformations and trends

The XX century has witnessed major transformations in the field of the family, the labour market and welfare states which underpin and legitimize WFB as one of the most relevant contemporary policy issues. Since the seventies, the rise in women's employment has led to an increase in dual-earner households in Western societies, in which both partners are engaged in paid employment<sup>1</sup>. This has been accompanied by major changes both in the sphere of the labour market and that of the family which are now more flexible and simultaneously less stable than in the early XX century. In particular, delayed marriage and childbearing decisions have resulted in the coincidence of the work and family years that is, the period of time when adults need to invest in their careers and, simultaneously, small children are present in the household. This has created a feeling of time pressure or "time poverty" for working parents which brings WFB to the centre of discussion (Jacobs and Gerson 2001).

In fact, alongside greater diversity in family forms, the financial and care contributions that women and men make to the household have been significantly altered. As a result of these overlapping influences the dual-earner model of work-family articulation stands currently in strong contrast with the male breadwinner/female carer pattern that was associated with the Fordist era<sup>2</sup>. This latter model was underpinned by the assumption that men specialized in paid work, being the recipients of the breadwinner wage, while women specialized in unpaid work, as the "angels of the house", responsible for all care and domestic tasks. During the first half of the XX century this separation of roles regarding paid and unpaid work was accompanied by diverse institutional arrangements that mirrored this same division, from employment related benefits directed to men, to pensions and welfare services (Sainsbury 1994). This «*mid-century social compromise*» (Crouch 1999, 53) was thus based on the premise that social care, specifically, was confined to the domestic sphere and under the responsibility of wives and mothers.

As noted, the later decades of the XX century brought about significant progress regarding female employment and households became increasingly dependent on two earners. However, this starkly contrasts with the persistency of deep inequalities in the

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<sup>1</sup> Despite considerable cross-country variation as shown by OECD Family Database.

<sup>2</sup> This can be an oversimplification of the social reality, as some authors emphasize the importance of national variations and of distinct pathways of evolution in work-family arrangements (Pfau-Effinger 2004; Crompton, Lewis, and Lyonette 2007).

division of care and domestic work leading some authors to claim that the ideology of domesticity<sup>3</sup> has not been overcome (Crompton, Lewis, and Lyonette 2007; Lewis 2009a). As Lewis puts it, «*Men and women must juggle the competing demands of work and family but the problems of balancing responsibilities are not the same*» (2009a, 1). In fact, the persistence of gender imbalances in the division of labour is at the heart of inequalities in WFB and must therefore constitute a central axis of this study.

This combination of changes and continuities in families and gender roles have simultaneously played a central role in the framing of WFB as a policy issue insofar as welfare states were urged to recognize and extend women's social rights as individuals independently from the male breadwinner. Most importantly, the rise in women's employment while remaining the primary responsible for the family's well-being has resulted in a care gap, bringing to the fore the need for state-provided care services. According to Sainsbury, the most «...*significant change in state-family relations is the extent to which tasks of reproduction and socialization, formerly activities of the family, have increasingly become functions of the public sector.*» (1996, 37). This is a crucial challenge to welfare states which are put under pressure to undertake the task of the provision of care, now transferred, at least partly, to the public sphere.

Care gaps and more globally the reconciliation of work and family have therefore been included in the set of “new social risks” associated with the transition to post-industrial societies, alongside other pressing issues as pensions, low skill and precarious jobs or youth unemployment (Taylor-Gooby 2004; Hemerijck 2017)<sup>4</sup>. However, the framing of reconciliation policies essentially as an answer to care deficits deriving from female employment has received ample criticism from feminist authors who have pointed out tensions and even contradictions with gender equality goals (Lewis 2009; Saraceno 2017; Stratigaki 2004, among others). While putting the emphasis on employment, it disregards the fact that there are still profound gender imbalances in the division of unpaid work. The response to WFB issues «...*thus*

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<sup>3</sup> See J. Williams 1991, 2001 for a feminist reflection on the origins and persistence of the ideology of domesticity, especially on the American case. She argues that «*Both the ideology and the practice of domesticity retain their hold (...) and market work continues to be structured in ways that perpetuate the economic vulnerability of caregivers.*» She adds, «*Domesticity did not die; it mutated. In the nineteenth century most married women were marginalized outside of the economy. Although women have reentered market work, most remain marginalized today. This is not equality.*»(Williams 2001, 2–3).

<sup>4</sup> In recent years, changes in the structure of risks have been mainly framed within a “social investment approach” both at the academic level and in policy practice. International organisations as the OECD and the World Bank have both endorsed this idea but the EU has promoted it in a particularly incisive way since the late nineties, culminating with the Social Investment Package in 2013.

*becomes one of enabling women to work more and to continue to do care work.»* (Lewis 2009a). It follows that policies are set up with the goal of reducing that constraint on women's employment, through public or market provided care services. As they argue, this view is indeed very restrictive and explicitly neglects women's and men's right to care which is actually addressed as a barrier, an impediment to paid work. *«There is no 'right to care', only the right to take time off paid work to perform a necessary task.»* (Saraceno 2017, 61). As a result, reconciliation policies when regarded as *«...the province of women...»* (Lewis 2009a) become unidimensional and ultimately fail to address others crucial issues as the role of men in the family domain and the value of care as relational work. In sum, despite supporting women's role as a paid worker, it is very limited regarding the development of equal opportunities for WFB for both women and men.

## **1.2. Distinct challenges in Iberia**

The importance of national path-dependencies is central to comparative studies of work and family relations. Despite the general trends presented above, transformations in work-family arrangements vary not only over time but also, and perhaps more considerably, within and across countries, even those with similar historical, political and cultural roots. As Parry rightly points out *«...there is nothing fixed, determined, unchanging or uniform about the division of labour.»* (Parry et al. 2005, 11) and the last five decades have indeed been testimony to this. Evolution patterns of work-family arrangements are therefore not uniform and several authors question both the assumption that the male-breadwinner model was the rule in most Western societies during the first half of the XX century as well as the necessary passage to a dual-earner model (Crompton, Lewis, and Lyonette 2007; Pfau-Effinger 2004). This idea of different pathways of evolution, whereby the development of work-family arrangements does not necessarily follow the same order in every society is crucial to comparative studies of WFB. It then follows that present patterns must be analysed taking the specific national backgrounds into account, namely at the institutional and the cultural levels, as will be further developed.

Despite being classified, in comparative literature on welfare regimes, in the same country clusters (among others, Guillen and Petmesidou 2008; Karamessini 2008; Saraceno 2006; Moreno 2006; Naldini 2003; Flaquer 2000; Guillén and Álvarez 2001;

Katrougalos and Lazaridis 2003; Trifiletti 1999; Martin 1996; Ferrera 1996; Leibfried 1992) Portugal and Spain do in fact feature distinct patterns of evolution of the work-family nexus, and this makes them a particularly relevant object of comparative research. They both endured authoritarian regimes until the seventies which, from the perspective of the gender division of labour, promoted the ideal of the male breadwinner/female carer family. This model simultaneously influenced and was reinforced by state policies which assumed and promoted the female dependence on the male wage and simultaneously women's central role in the provision of care needs.

However, even before the democratic transitions there were already significant differences in patterns of paid work between the countries, despite the ideal types represented in state propaganda. Due to different factors, as the colonial wars and massive emigration movements, Portuguese women replaced men in paid work most significantly from the sixties onwards and this pattern of integration in the labour market has not reverted in most recent decades. In the case of Spain, however, it was not until the mid-eighties that women started to consistently participate in paid work thus contributing to the increase in dual-earner households (Conde-Ruiz and Artiñano 2016; OECD 2011b, 2014). At the level of domestic and care tasks gendered patterns have proven to be much more resistant to change and women in both countries are still the main responsible for unpaid work in the household. Indeed, while Spain, similarly to other south European countries, has typically presented low employment levels with men as the prime earners and women as the prime carers (Dominguez-Folgueras 2015), Portugal has been a case of notably high employment levels, especially among women, coupled with low economic productivity and also low levels of social protection benefits, when compared with more developed welfare states (André and Feio 2000; Silva and others 2002; Tavora 2012a; Fishman 2010 among others). This anticipates a severe gender effect as care work is not entirely transferred either to the state or to the market, increasing women's double burden.

In fact, while sharing many historical, political and cultural features, Portugal and Spain present distinct stages of evolution regarding patterns of work-family articulation especially in terms of the periods of time when they occurred. It then follows that the specific challenges that Portuguese and Spanish dual-earner households face are necessarily different which makes this cases especially interesting for comparative purposes. This study thus entails two interrelated levels of comparison: it

develops a longitudinal analysis of both Portugal and Spain between the early nineties and 2012 in order to determine within-case variation; as well as a cross-country analysis of the two Iberian countries taking into account fundamental similarities and differences.

### **1.3. Definition and concepts**

The terms “work-family” and “work-life” balance have been used quite interchangeably in works related to the reconciliation of work and family life. However, there is in fact a distinction as the latter refers not only to the nexus between paid work and family but also to other aspects of life as leisure, involvement in community activities and personal time, among others. Even if at the discursive level changes in the usage of the “work-family” or “work-life” concepts have been more strategic than substantive (Lewis and Campbell 2008), this dissertation refers specifically to the issue of work-family balance and its implications for gender equality.

As already mentioned WFB has recently become a buzzword in popular, political and academic discourse. Nonetheless, multiple definitions have been put forward leading to some ambiguity about what this concept refers to, especially the term “balance” (for review, see Casper et al. 2017). Instinctively, it leads to the notion of equality across different life domains, be it equality of time engagement or of satisfaction, and in fact some works are based on this idea of balance as a scale that requires equal weights to achieve harmony (Greenhaus, Collins, and Shaw 2003). On the other hand, balance can also be regarded as context- or person-specific and hence focus on the allocation of existing resources to work and family demands (Voydanoff 2005) or on the consistency with values and individual preferences (Greenhaus and Allen 2011). Other definitions highlight the psychological and relational (Grzywacz and Carlson 2007) features of balance, treating it respectively as an individual attitude towards one’s level of success articulating work and family or as the accomplishment of role expectations shared with co-workers, friends and family. The one aspect all these works have in common is that they in fact treat “balance” as a metaphor either for absence of conflict, equal distribution of time and resources or for psychological stability and well-being.

Moreover, they all focus the subjective assessment of the articulation of work and family which stands in contrast with the strategies used by couples to combine different life domains, the main focus of this dissertation. As Crompton rightly points out, «*A distinction may be made between the practicalities of work-life arrangements and their experiential dimension.*» (Crompton 2006, 78). By using WFB as a metaphor for the objective articulation or combination of work and family responsibilities it does not necessarily follow «*that an 'experiential' balance has been reached.*» (2006, 78). In fact, given the wide range of meanings and indicators associated with WFB it is important to be aware of the fact that objective and subjective indicators may not always align. In practical terms, there can be very diverse strategies for articulating both spheres of life, taking gender into account. This study will refer to the following combinations of paid work and care: the *male breadwinner/female carer* model (male full-time worker and female full-time carer) and the *dual breadwinner* model, which can be divided into the *one-and-a-half earner* model (male full-time worker and female part-time worker and carer) and the *dual full-time earner* model (male and female full-time workers with kin, state or market care).<sup>5</sup>

Furthermore, it is equally important to clarify what the concepts of “work” and “family” entail as they are far from being univocal. The term “work-family” is presented as a dichotomy pointing at two distinct domains of life, that of paid employment and that of unpaid labour done in the household. However, and despite widespread use in popular and academic discourse, the boundaries between the two have in fact become more blurred in the last decades and their meanings more encompassing. In this sense, it is safe to say that post-industrialization processes brought about changes not only regarding the types and the division of labour but also concerning the nature of work and its conceptual boundaries. Despite the prevalence of the notion of work as paid employment in western societies, it results clearly insufficient given the multiplicity of domains within which work occurs.

Unpaid activities, as domestic tasks and especially care, which traditionally took place in the private sphere of the family, were often (still are?) conflated with the realm of affectional relationships, resulting invisible in analysis of “work”(Ungerson 2005). Feminist scholars have argued for a reconceptualization of this term since the late

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<sup>5</sup> This classification is based on works by other authors, among which Lewis 2001 and Guerreiro and Pereira 2007.

seventies, arguing for a deconstruction of the idea of domestic work and care not as the «*labour of love*» (Finch 1983) but as structural activities and equals to gainful employment instead (Parry et al. 2005; Pfau-Effinger and Geissler 2005; Leira and Saraceno 2008). Indeed, the idea of care as labour has become particularly relevant in the recent decades as the result of two closely related (but rarely simultaneous) processes, the integration of women in the labour market and the formalisations of care through its allocation to market or public services. In the field of social policy, proposals for the extension of social rights to care givers (Knijn and Kremer 1997), originally directed to those in paid employment, has been the reflection of more encompassing definitions of work as «*all the labour undertaken in a given society between institutional spheres.*» (Glucksmann 2005). Care work can therefore be defined as comprising both the economic and the non-economic activities needed to meet the needs of dependent children and adults, thus focusing on the interconnections of work developed in different spheres rather than on their boundaries (2005, 67). In this dissertation, specifically, only the care for children and not for elderly dependants will be addressed as the latter usually poses a challenge for carers in a later stage of their working lives and entails specific challenges both to the care provider and to the care receiver.

This rather evident blurring of the lines between private and public spheres and simultaneously the broadening of the idea of “work” are two fundamental aspects when engaging in work-family balance analysis. In fact, what is presented as a dichotomy between work and non-work activities which take place in public and private spheres, respectively, are just two of the many facets of the *total social organisation of labour* in a society (Glucksmann 2005). In sum, and for practical reasons, WFB should be regarded as a metaphor in all of its components, even if it represents a rather simplistic way of portraying such complex and rich concepts.

## **2. Research questions**

The global aim of this dissertation is to examine opportunities for WFB in Portugal and Spain between the early nineties and 2012 and to determine their influence on gendered patterns of employment and unpaid family work.

Firstly, the study concentrates on two crucial theoretical goals. It starts by examining the different theoretical perspectives which provide explanations for gendered outcomes in the articulation of work and family responsibilities as well as the associated empirical work and thus establishing the potential drivers of these outcomes. Next, it develops an analytical framework for assessing the multi-level incentives and constraints that women and men experience in respect to WFB from which to derive hypotheses on the selected cases.

Then, it addresses three central research questions which represent the pillars of the dissertation itself. It starts by analysing the evolution of divisions of paid and unpaid work in the selected times and spaces focusing on two related points: how have patterns of articulation of work and family responsibilities changed in Portugal and Spain between the early nineties and 2012? And, to what extent are women and men unequally involved in paid work and care, that is, how gendered are outcomes?

Moving to the potential drivers of these inequalities, it investigates the circumstances of support and constraint of WFB that have been at work in each case, considering their multi-dimensional nature, institutional and cultural. In doing so, it addresses the second main research question: what incentives or barriers to paid and unpaid work do women and men experience in the selected cases? And, consequently, to what extent have possibilities for WFB increased or diminished during the period of analysis? In order to link perceived alternatives with actual outcomes one further interrogation is put forward: how satisfied are women and men with the achieved work-family arrangement?

Finally, the third main research question reports to the relation between the structures of opportunities for WFB and the actual strategies via which women and men articulate paid work and care. More precisely, it seeks to establish whether the previously analysed institutional and cultural factors can predict patterns of work-family arrangements and, consequently, the possibilities for change.

### **3. State of the art and contribution to knowledge**

There is a considerable body of literature dedicated to the study of patterns of paid and unpaid work and the gendered variation they entail, coming from a variety of disciplinary fields. This section is interested, in particular, in empirical works pertaining to the last two decades and which relate to the selected cases, Portugal and Spain. It then sets out to explain how this particular study intends to contribute to the advancement of knowledge in the field of work-family balance.

As WFB gained relevance in the second half of the 20th century, a number of studies began to explore how dual-earner households were able to combine employment and family responsibilities as well as the role of the state and gender norms 'in its shaping'. A great part of empirical research in both countries addresses gender imbalances in the labour market, despite the two very contrasting contexts. Literature on the Portuguese case emphasizes the unusually high rates of full-time female employment, including among mothers and low-educated women, which go hand in hand with relatively high levels of familialism (Tavora 2012b, 2012a; André and Feio 2000; Torres 2008). These positive results in terms of levels of employment nonetheless coexist with vertical and horizontal patterns of gender segregation (Casaca and Perista 2014; Casaca 2010; Ferreira 2014, 2010a; Casaca 2012) and do not, by themselves, guarantee high levels of economic independence for women (Coelho 2010). Regarding the Spanish case, most of the literature addresses gender imbalances in the labour market (Conde-Ruiz and Artiñano 2016; Guner, Kaya, and Sánchez-Marcos 2014; Lago and Otero 2009) but focusing on the low female employment outcomes in line with other south European countries (Mínguez 2008). These patterns of imbalances are especially visible after motherhood, at which point a large share of women become inactive or move to unemployment (Gutiérrez-Domènech 2005). Despite its comparative interest, there are very few studies which concentrate on the Portuguese and Spanish cases and their divergent paths on labour and family patterns (Alcañiz and Guerreiro 2009; Fishman 2010). Other studies have also reflected upon the consequences of the economic crisis in patterns of precariousness and gender inequalities in employment, identifying phenomena like the 'feminization of labour conditions' that have occurred in the recent years especially in south European countries (Ferreira 2014; Alcañiz and Monteiro 2016; Addabbo et al. 2015; Gálvez, Rodríguez-Modroño, and Addabbo 2013).

On the other side of the work-family equation there is the question of unpaid work, especially the provision of care. Most research, both comparative and on individual cases, is unanimous in stating that there are still very visible traits of a traditional division of unpaid work, whereby men's contribution to care has not proportionately accompanied the rise in female employment (Perista 2002; Perista, Freitas, and Maximiano 1999; Torres 2005; Amâncio 2007; Dominguez-Folgueras 2015; Iázar, Moltó, and Sanchez 2004; Durán 2000; M. J. González, Jurado Guerrero, and Naldini 2009). This fact increases the burden of reconciliation mostly on women (Alcañiz 2012) whose steady incorporation in the labour market has resulted in a deep conflict between work and family responsibilities and which has brought the state's role to the forefront of public and academic debate.

Recent studies have indeed explored the evolution of family and reconciliation policies in general (Salido 2016; Casaca and Damião 2011; Torres, Coelho, and Cabrita 2013; Torres et al. 2012; Wall, São José, and Correia 2001; Campillo Poza et al. 2013) as well as on the impact of the European Union on these policies (Guillen Rodríguez, Garcia, and Begega 2009; Zartaloudis 2011). Other works have focused on the organisational dimension of policies, featuring the workplace as another central agent in the shaping of WFB (Guerreiro and Pereira 2007; Guerreiro, Pereira, and Abranches 2004). The strategies used by parents in the organisation of childcare arrangements have indeed become a matter of interest for academic research as well as the policies which are directed associated with such strategies: parental leaves (Perista and Lopes 1999; Wall and Escobedo 2011; Escobedo and Wall 2015; Valiente 1996; Lapuerta, González, and Baizán 2012) and formal childcare services and subsidies (Ibáñez and León 2014; Batista and Cardoso 2015; Wall 2015; Valiente 2010; León 2007, 2005; M. J. González and Vidal Torre 2005). Empirical research on values has also emphasized the conflicting paths in which strategies for WFB occur in the Iberian context, bringing to the fore the recent role of women as workers and the emerging role of men as carers (Aboim 2010a, 2007, 2010b; Wall 2007).

Comparative literature in this field is also of interest as work and care arrangements in Iberia have been mainly analysed within the south European perspective that is, assuming common familialistic traits in welfare and employment regimes. Indeed, deriving from Esping-Andersen's works on welfare regimes (1999, 1990), a vast body of studies underlines the shared characteristics of Portugal, Spain,

Italy and Greece regarding the organisation of family, employment and welfare provision (among others, Guillen and Petmesidou 2008; Karamessini 2008; Saraceno 2006; Moreno 2006; Naldini 2003; Lluís Flaquer 2000; Katrougalos and Lazaridis 2003; Trifiletti 1999; Martin 1996; Ferrera 1996; Leibfried 1992). The centrality of the family in the organisation of care provision and employment patterns – familialism – is considered the most distinctive feature of south European countries with a deep impact both on the extension and configuration of public policies and on work-family arrangements. Despite recognising differences among the cases, only rarely do authors point to clear divergences from the south European model.

Likewise, authors who have investigated reconciliation models or regimes have described the Iberian countries as cases of high incompatibility between work and family, especially for women, pointing out unsupportive reconciliation and labour policies as well as traditional gender norms as the main causes (among others, Matysiak 2011; Lohkamp-Himmighofen and Dienel 2000; Blofield e Franzoni 2015; Saraceno e Keck 2011). However, as stated, Portugal features profoundly different outcomes in employment patterns (Mingione 2001), with high levels of female full-time participation in the labour market which coexists with familialist traits in gender roles and limited public provision of care services and benefits (Tavora 2012a). This specific combination is overlooked by most comparative literature and it is bound to play a central role on the empirical account of gender inequalities in the articulation of the work and family spheres. Moreover, this variation is likely to point to equally distinct opportunities and constraints at the institutional and cultural levels.

In this sense, unlike most comparative research on WFB, this study does not aim at building large-scale typologies or country clusters but rather to elucidate the country-specific patterns of gender inequalities in WFB and the institutional and cultural factors which shape them. The analysis scrutinizes commonalities and differences between the Iberian countries that have so far been overlooked and even inconsistencies within each case, thus adding to the existing research on south European welfare regimes.

This study also contributes both theoretically and substantively to the wider literature on strategies for work-family balance and the gender variations they entail. At the theoretical level, it draws on distinct disciplinary approaches to the topic (economic, sociological and social policy), seeking to bring together different perspectives of the same problem. As the following chapter will further elaborate, its model of analysis is

inspired by recent work which applies, in an innovative manner, Amartya Sen's concept of freedom of agency to the analysis of social policy and, specifically to the WFB framework. In this sense, it accommodates both structures of opportunity and constraint in contrast with most previous explorations of the topic.

The research also assesses a specific set of policies in the field of reconciliation, adding to the important literature on welfare regimes which, from a feminist perspective, addresses the role of the welfare state in enhancing or obstructing gender equality. Indeed, the study's analytical frame emphasizes the role of policies in translating rights into viable options, bringing the institutional factors to the fore. Yet, in contrast to the majority of the studies on gender equality and the work-family axis, this research does not assess each policy dimension against a specific measure of gender equality. In fact, the concept of gender equality is anything but consensual and deeply context-specific and the use of Sen's capability approach will allow for an analysis with a non-prescriptive nature<sup>6</sup>.

The selected timeframe directly addresses the economic recession context that Europe has been experiencing since 2007/8, which actually encompasses two distinct crises: the financial sector crisis, which started in 2008 and the resulting sovereign debt crisis which followed in 2010 and affected south European countries the most. The unfolding of the crisis period has proven to be profoundly gendered precisely due to gender inequalities in the division of paid and unpaid work. Therefore, this longitudinal analysis allows for the incorporation of major changes in individual, institutional and cultural resources which occurred as a consequence of the recession and which are expected to shed light on the drivers of gender inequalities in WFB in the Iberian countries.

#### **4. Explaining Work-Family Balance - Theories of Agency and Constraint**

This section starts by addressing the different theoretical approaches that traditionally tackle strategies for reconciling work and family responsibilities and their main limitations. The literature reviewed in this section specifically concerns the theories and models which seek to explain strategies for WFB and the gendered

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<sup>6</sup> See section II.1 on the adaptation of the Capability Approach to the study of work-family balance and gender inequalities.

variation it entails, putting forward a range of explanatory factors which can be broadly divided into those emphasizing the role of agency and choice and those which underline the role of structure and constraint.

#### **4.1. The role of agency**

From the perspective of agency around employment and care responsibilities, family's choices are a straightforward expression of utility (Becker 1981) or preferences (Hakim 2000) which can result in different arrangements.

Within economics, the neoclassical approach to labour market outcomes centres its theory on the concept of human capital (Becker, 1965, 1975; Mincer, 1975), which includes both natural and acquired abilities through education and job experience. This process of enhancing individual attributes is seen as a personal investment, a choice that will be rewarded by earnings in the labour market. Put simply, high human capital leads to high wage levels and therefore the gender pay gap is the result of lower human capital investments made by women, who choose to leave (temporarily or not) employment due to childbearing. Moreover, due to their role as primary carer, women's productivity in paid work is also lower than men's. Due to this discontinuity in work experience, women's human capital investment decreases and so do their earnings – and classical economics accounts take this fact as a given (Mincer, Polachek, 1974). Becker further develops the concept of human capital and seeks to elaborate a theory which explains the processes by which the decisions on work and childcare are made. In his Household Economy Model he assumes that each partner will allocate time to paid work and care based on their comparative advantage on each task. Therefore, the family is regarded as an economic unit, whose choices on work and care are a result of rational choice processes driven by human capital and efficiency factors. Gendered specialization is in fact the result of the household utility maximization, given a women's relative productivity in childcare activities and a men's relative productivity in paid labour. The resulting gender inequalities in the labour market and in the household are simply the result of decisions made along rational lines and biological differences: *«Although the sharp sexual division of labour in all societies between the market and household sectors is partly due to the gains from specialized investments, it is also partly due to intrinsic differences between the sexes. (...) Women not only have a heavy biological commitment to the production and feeding of children, but they also are*

*biologically committed to the care of children in other, more subtle ways.»* (Becker 1981, 37).

Becker's Household Economy Model assumes that mothers, as the case in point, have choices which in fact do not exist, underestimating the weight of cultural and institutional norms. While the positive effect of human capital in the potential remuneration of an individual seems to remain valid, it is still not a sufficient condition for women to achieve a more equal place in the household regarding care and domestic activities. According to recent empirical work, despite the rise of female employment, men's participation in care activities has not changed proportionally (Hantrais 2004) (Gershuny, 2000; Fuwa and Cohen, 2007). The case of Portugal is paradigmatic: despite the fact that Portuguese mothers tend to work continuously and full-time, they still undertake the majority of unpaid work in the household (André and Feio 2000). Even within groups of women with higher educational levels, the lower participation in care and domestic activities is not compensated with a higher participation of the male partner but to an externalization of those activities (Perista and Lopes 1999, 239; Torres 2005, 113). In sum, if, in fact, the more human capital a mother has, the better her possibilities in employment, it is not due to a corresponding specialization of her partner in care activities but rather to her ability for these activities. In other words, inequalities in the division of paid and unpaid work do not depend only on each family member's comparative advantage in performing paid or unpaid work, but on gender itself and on the expectations that men and women have regarding their role in society (Torres 2005).

From a sociological perspective, Hakim underlines that the theories based on accounts of human capital leave «... *all the difficult questions unanswered. Why do most women give priority to family work over an employment career and hence invest less in human capital? (...) Human capital theory offers no ideas at all about how and why women (and men) make the choices they do. It only offers an evaluation of the fairness of the earnings outcome, supporting the status quo as efficient and consistent with economic rationality.* »(Hakim 2000, 28). The author puts forward an alternative theory on the drivers for choice between family work and employment, «... *a genuine choice in affluent modern societies.*»(2000, 1). Despite maintaining the assumption that outcomes reflect individual preferences, she proposes that preferences depart from cultural values rather than from rational choice which subsequently generate work orientations which remain stable over the life course. In this sense, if «*women are heterogeneous in their*

*preferences and priorities on the conflict between family life and employment, (...) they are therefore heterogeneous also in their employment patterns and work histories.»*(2000, 4). Hakim's work, departing from the assumption of heterogeneous preferences as the main determinant of women's behaviour, deeply contrasts with the currently dominant perspective within feminism which assumes the uniformity of women's and men's interests in an egalitarian model of symmetrical family roles endorsed by the political system. Diversity is in fact theorized beyond cultural differences between social groups but rather «...*in such a way as to constitute qualitative differences and conflicting interests between groups of women.»*(2000, 32). However, from this same assumption - behaviour results from preferences – follows that different categories of women (home-centred, work-centred or adaptive) would be almost impermeable to the influence of other policy and non-policy factors, and this is the main weakness of the Preference Theory. McRae argues that the explanation of women's and men's choices between family work and employment are not complete if normative and structural constraints are not taken into consideration. In fact, «...*women with similar preferences (but differing capacities for overcoming constraints) will have very different labour market careers.»*(McRae 2003, 318). Furthermore, the stability of women's preferences over the life course has also been questioned with some authors identifying transitions between different orientations according to changing life circumstances (Akerlof and Kranton 2000; Crompton and Harris 1998; Kan 2007). According to Naegele (2003), the study of time arrangements – as the organization of time to work and time for family – should take into consideration not only individual preferences and needs but also the institutional options available, in an attempt to bridge the *actors vs. institutions* debate.

#### **4.2. The role of institutions and gender norms**

Considerable research has challenged theories of agency, showing that work orientations do change over time and that this transformation is generated by different circumstances. These studies concern themselves mainly with the identification of factors which shape gendered outcomes in WFB at different levels as, for example, the household, where negotiations for WFB occur.

One obvious limitation of agency theories and models is the absence of the institutional context within which decisions on the division of paid and unpaid work and hence WFB occurs. The role of state institutions and the fundamental assumption that their underlying structures of resources are in fact empowering or constraining for acting is fundamental for our study. A vast literature in the field of social policy has addressed how policy regimes impact upon agency outcomes, conceptualizing the welfare state as the mediator of the individual's relationship with the market and, more recently, with the family. In the case of WFB, specifically, welfare state analyses reveal how institutional arrangements can promote or hinder the ability to balance work and care responsibilities.

The most common way to compare welfare states is to build typologies, thus placing the single cases into a comparative perspective. *The Three Worlds of Welfare Capitalism* (Esping-Andersen 1990) is certainly the most influential classification of welfare states and has long provided valuable elements for discussion. Throughout this dissertation some of these critical points of contention are introduced, among which gender consequences of different welfare mixes, the classification of south European countries as well as the undervaluation of welfare provision by the third sector (see Lewis 2004). Esping-Andersen classifies regime types according to the concepts of decommodification, social stratification and also according to the distribution of welfare functions among the state, the market and the family. To this end, consideration is given to the extent to which individuals and families can afford an acceptable standard of living independently of market participation, as well as to indicators of how welfare state institutions operate in structuring class and social order. The resulting outline of conservative, liberal and social-democratic welfare regimes is based on the combination of driving forces, institutions and outcomes that lead to "three worlds of welfare capitalism". In spite of the prevalence of this typology, it fails to consider in sufficient detail the impact of welfare policies on caring and family arrangements, neglecting central gender-based institutions and outcomes and has therefore suffered numerous criticisms from feminist scholars. Consequently, a large body of work emerged aiming to go beyond the effects of welfare regimes on class relations, focusing instead on their potential to reproduce or transform gender relations through the redistribution of paid and unpaid labour inside and outside the household.

Since the early nineties, feminist scholars have highlighted the gendered nature of welfare states focusing, among other areas, on the role of care, the access of women to paid work and the importance of personal autonomy and defamilialisation.

At the empirical level, the work of Jane Lewis has provided a valuable alternative typology for highlighting how welfare systems shape gendered work patterns, using the strength of the 'male-breadwinner model' as a proxy measure. It was ground-breaking as it revealed country clusters essentially different from the ones depicted in Esping-Andersen's work, thus proving the insufficiency of the concept of decommodification (Lewis 1992).

In fact, decommodification – which occurs when social benefits are provided as a right, independently from market participation - is especially problematic in the context of gender relations due to the distinct male and female labour patterns. Women need, in fact, first and foremost to secure a position in the paid labour force, which will potentially lead to economic independence and leverage within the family. Therefore, the decommodification dimension, needs to be *«supplemented with a new analytical dimension that taps into the extent to which states promote or discourage women's paid employment (...) and guarantee services that enable women to balance home and work responsibilities.»*(Orloff 1993, 317) In addition to this, as Orloff proposes, a second analytical dimension must be developed to properly assess the welfare state's impact on gender relations, which is the *«capacity to form and maintain an autonomous household»*(Orloff 1993, 319). This dimension is directly related with Lister's concept of defamilialisation and reveals whether the welfare state lessens the extent to which women are required to stay home and perform care and domestic work (Leitner 2003; Lister 1990, 1994).

This work was followed by other feminist social theorists, like Nancy Fraser (1994), who advocated that the breadwinner model needed to be replaced in order to achieve gender equality. She attempts to overcome the dilemma concerning the purpose of gender equality - the equality-as-sameness or equality-as-difference problem - by arguing that neither full employment for both men and women (universal breadwinner model) nor economic reward for domestic carers (caregiver parity) would result in gender equality. While the former forces women into the male mould, the latter would tend to consolidate the gender division of labour. Her proposal is that men become more

like women, combining care work with paid employment, a reality that would only be possible once a major shift in gender roles takes place in the family sphere.

Feminist scholarship on the welfare state has focused on two main arguments which are central for the study of WFB: though welfare states have the power to decommodify, their impact on a citizen's position in the economy is different for men and women; at the same time, welfare states also have the power to defamilialize, affecting men's and women's position in the household (Sainsbury 1996, 1994).

There is a relative consensus on the fact that the policy sector devoted to reconciliation policies has received a significant amount of interest in the last decades, reclaiming the state as a key player in feminist theories and practices, which is particularly interesting given that work-family reconciliation policies rarely, if ever, have gender equality as their primary goal. Instead, they often aim at increasing women's labour supply, fertility and child well-being, as noted in previous sections. For this reason, and given its potential to overlap with other policy sectors (as family or employment policies), Mazur's conceptualization of reconciliation policies as feminist is particularly interesting in the sense that she frames these policies as seeking « [...] *to promote women's economic independence within the purview of the predominant division of labour between work and family.*» (Mazur 2002, 104; Goertz and Mazur 2008).

The work of these and other authors have been extensively used in comparative analyses of reconciliation policies which share the focus on gender equality by promoting the employment of mothers as well as the involvement of fathers in care (Ray et al. 2008; M. E. Daly 2001; Lambert 2008; Rubery, Smith, and Fagan 1999; Crompton 1999; Lohkamp-Himmighofen and Dienel 2000; Blofield and Franzoni 2015; Morgan 2009 among others). These studies are underpinned by the assumption that work-family articulation strategies are strongly influenced by the policy environment thus concentrating on the corresponding patterns of benefits and services provision. Indeed, there appears to be a consensus that possibilities for WFB are favoured by paid parental leave provisions for mother and father, as well as by accessible and affordable childcare services and flexible working time regulations.

There is a growing interest in leave designs in comparative social policy literature, as they can either reinforce or transform the traditional division of labour, according to their specific stipulations. The impact of leave policies is therefore

ambiguous (Ray et al. 2008). On the one hand, the absence of paid leave schemes potentially leads to women abandoning the labour market, due both to traditional social expectations about care work and to their economic disadvantage regarding their lower salaries. However, the mere existence of parental leave schemes does not necessarily lead to gender equality (Moss and Deven 1999). While paid leave schemes of short duration allow mothers to return to work instead of quitting the labour market, thus helping ensure job continuity for new mothers, compulsory paid leaves of longer duration available only to mothers can erode women's human capital and reduce opportunities for promotion (Ray et al. 2008). According to Gornick and Meyers (2003), generous family leave provisions taken up predominantly by mothers can weaken women's labour market attachment and increase gender inequalities in paid and unpaid work. Thus, «*government policies are needed that both enable and encourage fathers to share in family leave benefits*» (2003, 133). Accordingly, if the leave available to the father can be transferred to the mother, is too short or does not have a high income replacement rate, it is unlikely that fathers will be successfully engaged in care giving. Since fathers' take-up of parental leave lags behind that of mothers, the net effect of parental leave schemes on gender equality is unclear (Ray et al. 2008).

Unlike parental leave policies, accessible and affordable childcare services tend to have an unambiguously positive impact on mothers' attachment to the labour force and hence on possibilities for WFB (Baker, Gruber, and Milligan 2008; Uunk, Kalmijn, and Muffels 2005). As feminist authors argue, public support for the provision of childcare is not only central to the solution of the "care gap" and the foundation of lifelong learning but, first and foremost, it is a necessary condition for gender equality in WFB (Michel and Mahon 2013). According to Leira, the public provision of childcare services «*highlight a dominant shifting in parenthood thinking, namely the translation of parental responsibility for children's care into social rights of mothers and fathers*» (2006, 26). As stated, the financial costs of childcare<sup>7</sup> are an especially important variable, as women from lower income families will be more likely to abandon their jobs when facing higher childcare costs or, in turn, resort to informal care. As different studies show, childcare fees vary a lot between countries and they can represent a strong disincentive to work for second earners (usually women) whenever

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<sup>7</sup> There is considerable variation in the way childcare provision is financed: direct provision of public child care; cost sharing with parents through co-payments; and alternative arrangements such as subsidies and tax credits.

parents don't have access to informal care solutions. In contrast, assuming that parents have access to free child- and out-of-school-hours care (by grandparents, other relatives, neighbours, etc.), work usually pays for second earners (OECD 2004; Immervoll and Barber 2005). In this sense, both the tax treatment of childcare costs and childcare related benefits can be an important source of unpaid work bias insofar as for couples with children, work may not actually pay enough (or at all) once childcare fees are taken into account (Sainsbury 1999; Scheiwe 2011; McCaffery 2008).

### **4.3. Challenges to the institutional approach**

The institutional approach has nonetheless been challenged by empirical studies which point to the limited impact of state policies on WFB at different levels. On the one hand, some suggest that a supportive policy environment is not in itself enough to bring about WFB even in the Scandinavian countries where benefits and services are traditionally the more generous (Ahlberg, Roman, and Duncan 2008). On the other hand, some countries with lower levels of state support to dual-earner families, as the USA and Portugal, present nonetheless low penalties to motherhood in respect to female employment (Crompton 2006; Lewis 2009a). Furthermore, countries with similar reconciliation policies, as parental leave schemes and childcare services, do not necessarily represent cases of similar work-family strategies (Pfau-Effinger 2004, 2005). According to Gershuny and Sullivan (2003), this limitation is especially visible in the sphere of domestic work which appears to be particularly resistant to change despite favourable policy provisions.

From a sociological perspective, the bargaining perspective (Agarwal 1997) includes norms and social perception in the discussion, highlighting that gender norms set limits on how bargaining can occur and even on the outcomes that can be bargained over. In fact, they can even influence each partner's perceptions of their own needs, rights and responsibilities and hence how power and dominance is achieved in the decision-making process of dividing paid work and care. The household strategies approach adds to these models starting from the notion of the household as a unit with a dynamic character, rather than the passive outcome of policies.

Indeed, some authors argue that the acknowledgment of the mutual impact of policies and culture are crucial for understanding strategies of work-family articulation,

putting forward alternative frameworks which also integrate values and cultural ideals (Pfau-Effinger 1998, 2005; Haas 2005). According to this approach, cultural factors exert an important influence on the impact of state policies on household strategies and decision making processes, as they «...*limit the range of options considered by social actors and shape the range of options for choice which are noticed by the individuals.*» (Pfau-Effinger 2005, 12). The idea of gender culture (Pfau-Effinger 1998) is particularly useful for WFB studies as it refers to the prevailing assumptions on the desirable form of gender relations and of the division of labour between men and women, and which play a decisive role both on reconciliation policies' formation and on work-family strategies. However, despite the fact that a given set of norms and values prevails in relation to others it does not follow that societies are normatively homogeneous and can in fact take in various tensions and contradictions. On the one hand, a single individual may combine values that are apparently opposed to each other, resulting in a specific mix of values. On the other hand, this set of norms and values may also oppose those promoted by the state, either through political discourse or public policies. There can be the case of progressive policies attempting to confront traditional cultural norms or the opposite. Hence, each society may encompass tensions regarding gender cultures at different levels which may result in pressure for social change. In fact, the idea of change and development of gender cultures is particularly significant as it often occurs at different speeds or even in contradictory directions to that of institutional frameworks. Hence the important distinction between the dominant cultural model of the family on the one hand, and the prevalent family structure (social practices) on the other.

Adding to empirical contradictions, at the conceptual level difficulties arise as there is no agreement on what the gendered assumptions in balancing work and family life are, that is, what gender equality means with respect to reconciliation. The most widely accepted view, put forward mainly by feminist academics in the social-democrat tradition (Gornick and Meyers 2008, Fraser, 1994, Sainsbury, 1999, Crompton 1999), holds that equality is associated with gender symmetry and proposes a 'dual earner-dual carer' model, based on an equal division of care work and paid employment between men and women. Though distinctive from the sameness approach of liberal feminism - highlighting the importance of caregiving activities -, the social-democratic feminist proposal also echoes a demand for sameness in the sense that it attempts «*to make men*

*more like women are now*».(Orloff 2008, 10) Other academic writers have called attention to the possibility of other routes to equality, namely those closest to a maternalist tradition which has been prevalent in countries like Germany (Trzcinsky, 2000, 2004). This approach stands for a concept of equality as the recognition of difference and the valuation of the contribution that women make in society, even if at the cost of constraining women's employment and reinforcing the male breadwinner model. Its centrepiece is state provision of caregiver allowances, thus the bulk of caring work has to be kept in the household and supported by public funds.

An important limitation of these studies is that they are necessarily influenced by normative perceptions on the role of the family and the gendered division of labour, assuming a «*single norm for a socially useful person*». They are, in fact, dangerously based on the assumption of the uniformity of women's and men's interests regardless of their «*historically-specific cultural, economic and political contexts as well as well their individual resources (class, level of education, gender culture, etc.)*» (Orloff 2008, 16).<sup>8</sup>

In the context of WFB this leads us to the question of what might constitute the most gender-equalitarian model: one that is based on an equal division of care work and paid employment between men and women or, on the other hand, one that economically rewards care work even if it would maintain the gender division of labour. Some feminist researchers have called for alternative approaches that would allow, on the one hand, for a valuation of care work alongside labour market participation (Giullari and Lewis 2005) and, on the other, for agency inequalities in different institutional contexts (Orloff 2009). Though recognizing that there is no such thing as policy neutrality, these scholars stand for a policy model which removes obstacles to choice and provides resources for a range of options in WFB both for women and men.

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<sup>8</sup> Refer also to Hakim 2000.

## Summary

This chapter has presented an introduction to the main topic of this dissertation, the issue of work-family balance. WFB has been at the centre of discussion during the last decades and it is often referred to as one of the most desirable goals in Western societies. However, its regular presence in popular, academic and political discussion is also accompanied by a very small consensus on its meaning, its implications and mainly on the causes of work-family *imbalances*. Therefore, this chapter had three main goals: to historically and conceptually contextualize WFB, identifying the problems and questions that arise from its study; to summarize existing research on this field and to put forward the potential contributions of this dissertation. Finally it has addressed the main theoretical approaches which underpin studies on WFB, concentrating on their advantages and on their limitations.

The first section concentrates on the historical transformations which have brought WFB issues to centre stage during the XX century. It has underscored how changes in structures of production and family forms in post-industrial societies have challenged and reshaped traditional assumptions on gender roles and simultaneously on the division of paid and unpaid work. On the other hand, it has also recognized that this progressive modernization of both gender values and social practices have not implied the elimination of gender inequalities in work-family arrangements. Indeed, it underlines the fast integration of women in employment has not been accompanied by a similar increase in the participation of men in unpaid family work which has resulted in a serious overload of women with paid work and care tasks.

The next section emphasizes the idea of particular paths of evolution regarding work-family arrangements even between countries generally classified under the same country clusters and sharing many political, economic and cultural characteristics. Some distinctive features are already introduced in order to justify this idea, namely the different patterns of paid and unpaid work which already anticipate distinct origins of gender imbalances in the articulation of work and family tasks.

Despite the ubiquity of the issue of WFB there is often very scarce information on the meanings behind each term and this introductory chapter recognizes this problem. In contrast with works which focus on the subjective assessment of balance, this dissertation concentrates on the practical strategies instead, that is, the objective combinations of paid work and care and the ways dual-earner couples articulate these

two central spheres of contemporary lives. Furthermore, ambivalences regarding the meanings of “work” and “family” are also identified. This section shows how the borders between the two apparently opposed terms are in fact extremely blurred as tasks developed in the family sphere, especially care, become increasingly recognized as work as well, albeit unpaid. This issue will be recovered throughout the dissertation.

This contextualization and clarification of the object of study has resulted in the following main research goals: to examine the evolution of gendered patterns of employment and unpaid family work in the selected cases; to identify the circumstances of support and constraint to WFB taking into account their multi-dimensional nature – institutional and cultural –; to analyse the evolution of reconciliation policies, job quality and gender norms in both countries and, finally, to determine the influence of the previous factors on patterns of work-family arrangements and the possibilities for change.

Sections three and four take up the task of summarizing existing research on this field as well as the theoretical approaches which underpin them. As dual-earner households became more prevalent in the last decades, academic research on the articulation of paid work and family tasks also increased as well as on the role of the state and of social norms. In this regard, literature mainly concentrates on gender imbalances on the labour market – marked by high and low female integration in Portugal and Spain, respectively – and in unpaid family work. Concerning the latter, the problems identified are similar for both countries: the significantly lower contribution of men in the family sphere and the role of state in balancing the resulting ‘care gap’. More recent works also emphasize the effects of the economic crisis both on opportunities for WFB and on their determinants.

The chapter closes with a review of the different approaches that interpret and explain strategies for the articulation of work and family and the gendered division of work that they entail. These theories are commonly divided into those emphasizing the role of choice and human capital and those arguing for the centrality of external conditions that may constrain or facilitate WFB. According to the first perspective, the division of work and care is determined exclusively by human capital factors, that is, both at the individual or at the household level the extent to which women and men are engaged in paid and unpaid work is based on the logic of comparative advantage and the result of rational choice. These theories have been increasingly criticised as the

influence of external factors on individual choice has come to the fore in work-family research. This section argues how different factors at the institutional and the normative levels shape women's and men's decisions to work or to care. The policy environment, labour market structures and gender norms all hold a strong explanatory power of gender imbalances in work-family articulation.

The following chapter departs from this theoretical tension and addresses an alternative approach that tries to reconcile both views and which further underpins this dissertation's analytical framework. Additionally, it puts forward the study's central hypotheses as well as its methodological strategy.

## Chapter II – Theoretical and Methodological Approach

This chapter sets out the theoretical and empirical strategies that will guide the subsequent chapters. It begins with the presentation of the capability approach as an alternative perspective which will underpin this study's analytical framework and discusses how it will be represented empirically. It then presents the selected research methods as well as the case selection strategy and data sources.

### 1. The Capability Approach – an Alternative Path

The capability approach (CA) is a framework of thought developed by Amartya Sen (1992), based on the concept of situated agency, thus recognizing the existence of both agency and constraint, and attempts to understand the extent to which genuine choice is available. Although Sen's work has been originally applied in studies of inequalities in developing countries, it has recently been used in analysis of social policy, by several research projects at the European level (CAPRIGHT, WORKABLE, RECOWOWE)<sup>9</sup>. Some of the more relevant topics in this body of literature are related to labour market and employment policies (Salais and Villeneuve 2004; Bonvin and Farvaque 2006), social rights (Browne, Deakin, and Wilkinson 2004), and work-family reconciliation (Lewis 2009a; B. Hobson, Fahlén, and Takács 2011; B. Hobson 2015).

In this section, Amartya Sen's capability approach will be presented as an alternative perspective which captures the insights from both the theories that emphasize individual choice and structural constraint in work-family arrangements. It starts by briefly introducing the conceptual elements of the approach and then moves to explore its potentialities in the study of WFB. Next, it considers an analytical model of capabilities for WFB in European societies.

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<sup>9</sup> CAPRIGHT: Resources, rights and capabilities - in search of social foundations for Europe (2007-10); WorkAble: Making capabilities work (2009-12); RECOWOWE: Reconciling Work and Welfare in Europe (2006-11), <http://www.recwowe.eu/>.

## 1.1. Capability Approach - foundations and limitations

The CA is a process-based approach which conceptualizes different stages that start at an individual's resources (commodities), via the constraints (conversion factors) he/she will face until the choice of the preferred outcome (functioning) from the set of outcomes available (capabilities).

In contrast with some income-based approaches to welfare, resources are not the end in itself but rather the starting point and may be transformed in viable life options (functionings) depending on the conversion factors they face. It therefore calls for different questions: instead of asking what individuals do, it addresses the process itself, the constraints they face and possibilities for change. Indeed, the CA conceptualizes equality not as equality of resources but of capabilities insofar as each person is free to choose between alternative ways of living. As Robeyns puts it, « *what is ultimately important is that people have the freedoms (capabilities) to lead the kind of lives they want to lead, to do what they want to do and be the person they want to be.* » (2003a, 7).

Though the starting point of the process are individual resources (that can go from material goods to human capital), the conversion factors will act as barriers or facilitators to the transformation of resources into available life options, and ultimately, in the desired functioning. In this sense, Sen's framework adopts a multi-layered approach to agency, underlining the importance of the context where economic and social interactions take place. Originally, the CA considers three types of conversion factors: personal, social and environmental. However, it can be adapted to diverse fields of analysis, according to the capabilities under investigation.

The two core concepts of the CA are indeed *functionings* and *capabilities*. Although closely related, their distinction is key to this approach: « *A functioning is an achievement, whereas a capability is the ability to achieve. Functionings are, in a sense, more directly related to living conditions, since they are different aspects of living conditions. Capabilities, in contrast, are notions of freedom, in the positive sense: what real opportunities you have regarding the life you may lead.* » (A. K. Sen, Muellbauer, and Hawthorn 1988, 36). An individual's capability set is therefore their set of available functionings. However, and despite the centrality of both concepts, Sen prioritizes capabilities over functionings, making it the normative anchor for assessing human well-being and quality of life. In sum, priority is given to the life paths a person could follow rather than to the way the person actually lives. Further, concepts like utility and

commodities rank even lower in the CA due to the dangers of adaptive preferences – which could influence feelings of satisfaction – and to the fact that goods and commodities represent the means to achieve a life goal, and not the end themselves. In fact, even though Sen acknowledges the importance of other levels of information, *«(...) they have to be appraised precisely in that light – in terms of their actual effectiveness in enriching the lives and liberties of people – rather than taking them to be valuable in themselves.»*(Drèze and Sen 2002, 3). This is a central feature of the CA - that *«If equality is to be demanded in any space (...) it is to be demanded in the space of capabilities.»* (Gasper 2006, 10).

According to Sen, the CA is anything but a theory of justice and therefore does not define the components of a good life at a societal level. Indeed, this deeply contrasts with the prescriptive nature embedded in other approaches to, for instance, gender equality and WFB. Then, which capabilities matter? From a capability perspective, the ones that ‘people have reason to value’. This proposition, *«(...) that social arrangements should be evaluated according to the extent of freedom people have to promote or achieve functionings they value»* (Gasper 2006, 12), reveals Sen’s positioning within the liberal school of thought and has allowed for several more extreme liberal formulations. Nonetheless, and most importantly, he complements the criterion of reasoned individual valuation with the reliance on democratic public procedures to the prioritization of capabilities for the group. From a policy perspective, the CA draws on the classic proposition that individuals are not capable of deciding against their own interest and supplements the individual prioritization of capabilities with group decision-making processes, according to democratic rules.

One question subject to considerable debate is whether the CA should define a list of universal capabilities or maintain this list as context-specific. This issue can be viewed as an attempt to somehow structure the political determination of capabilities, which Sen regards as unnecessary due to the benevolent nature of democratic processes and institutions. In contrast, other authors claim that history has proven that even under democratic rules there were groups that have been systematically deprived from their basic rights and this is reason enough for the establishment of a list of basic capabilities (understood as rights) that could not be revoked not even by majority ruling. Martha Nussbaum(Nussbaum and Sen 1993; Nussbaum 2000) is the main proponent of this list of capabilities but others could be identified as such, like the Millennium Development

Goals or the Universal Declaration of Human Rights. Some of Sen's writings seem to indicate that a middle-term could be reached, in the sense that the author accepts the existence of basic capabilities (as health, nourishment and education) and further recognizes the possibility of the constitution of more extensive lists as long as they derive from democratic decision-making and specific to each political community. Following Sen's line of thought, the definition of valuable capabilities has to rely on CA-external reference points. In the case of WFB, Lewis (2005) and Hobson (2009) propose that caring is an equally valuable functioning as employment and therefore conclude that the freedom of choice between care and labour market participation are to be taken as a normative reference point.

Difficulties in operationalization have also been highlighted by some authors (Gasper 2006; Goerne 2010), especially due to the hypothetical nature of the capability set, i.e., the possible outcomes an individual could have chosen. Indeed, one of the main challenges of the CA is to apply the concept of *capability* to choices made in the real world. Firstly, the notion of the hypothetical attainment of functionings is extremely difficult to specify, especially due to its prospective nature, that is, it concerns the future, the life opportunities open to a specific person. As Cohen puts it: *«The knowledge of capability sets required for judging whether a [science teacher's] capability set is better or worse than someone else's requires information that is simply unavailable. It is not a conventional problem of asymmetric information – as though the science teacher knows his capability set, but lacks appropriate incentives for revealing it. The problem is that he has no access to it.»*(as cited in Gasper 2006, 29).

One possible solution would be to proceed by using simplifying and standardizing assumptions: look at representative standard individuals and standard human values and not individual preferences (2006, 24). This, in turn, could build on the argument for the constitution of a list of basic capabilities which implies that the CA should seek to assess a person's ability to promote standard human ends rather than his/her own particular ends. Some authors consider the universal possession of a set of basic capabilities a more operational criterion (2006, 30).

One further difficulty is the use of subjective valuations in the assessment of capabilities. Despite Sen having considered them as a flawed measure of well-being (as mentioned above in this section), several recent studies of capabilities and quality of life make use of subjective indicators, as one dimension among others. In sum, at the

empirical stage, the research has to turn to either subjective valuations of possibilities (perceptions of the scope of alternatives) and/or to objective data (functionings) which will serve as an approximation to possible outcomes. As Gasper concludes, in the end, *«the key empirical and policy foci, besides functionings (...) are people's skills and powers in addition to what people notionally can attain.»*(2006, 29).

## **1.2. Potentialities in the study of work-family balance**

In what way does a capability-based approach help to overcome the difficulties laid out in section I.4? Mainly through the concept of situated agency which entails that what one would choose is bound up with the real opportunities to choose. Whereas utilitarian theories assume that a given level of resources result in the same set of options for everyone – and hence variation in outcomes result from variation in preferences – , the CA proposes an intermediate space where apparently available options may in fact be made unavailable due to a set of constraints. Choice, therefore, goes beyond the manifestation of a preference.

In the field of WFB, specifically, this proposition implies that, in contrast with utility and preference theories, institutional settings do shape work-family options and that preferences do not directly reflect women's and men's values and lifestyle but rather their perception of the work-family options available. Therefore, preferences are not perceived as static but moulded by shifts in conversion factors as, for example, economic environment and cultural values. The undervaluation of either norms or institutional settings on the decision-making processes concerning WFB is pointed as the main weakness of both utility theories and bargaining models, as they do not take into account the multi-level factors that in fact influence an individual's well-being and even his perception of his well-being.

For some authors, the CA is *«quintessentially a public policy approach»* (Gasper 2006, 14) as, while recognizing the need for public processes that limit individual choices, it underlines that free choice implies both the absence of constraints and the need for positive support. As a consequence, although human agency is at the centre of the CA, institutions and policies play a central role in a person's life prospects. This is, of course, particularly interesting from a policy perspective as it allows for the assessment of policy as the extent to which it enables genuine choice or, in other words,

the possibility to bridge the gap between aspirations and reality. Within the context of welfare state analysis, path dependency is the mechanism most commonly employed to explain patterns of institutional development and stratification outcomes. The CA, in turn, goes beyond the measurement of who does what and for how long in employment and care, and seeks additionally to capture the potentialities for change and how deep they mirror mothers' and fathers' aspirations towards WFB. In other words, it allows for a dynamic analysis of the impact of welfare states change on WFB possibilities, by capturing the shifting configurations in state-market-family relations and its gender dimensions.

The importance of human diversity in the CA makes it especially suitable for analyses of gender inequalities and this feature is at the basis of its adaption to WFB studies. Indeed, it not only emphasizes differences among individuals but also among groups. As stated in the previous section, the constraints on achieving the functionings that are valuable to us go beyond economic resources and this has been one key dimension of the existing literature on the measurement of inequalities (traditional welfare economics) that feminist scholars have contested. Though favouring the correction of structural inequalities between women and men<sup>10</sup>, Sen argues that gender inequalities *«can be understood much better by comparing those things that intrinsically matter (such as functionings and capabilities), rather than just the means [to achieve them] like resources. The issue of gender inequality is ultimately one of disparate freedoms.»*( Sen 1992, 125)

Several feminist academics addressed the issue of gender inequalities from a capability perspective (Nussbaum 2000; Robeyns 2003a) while some authors focused specifically the issue of WFB and intra-household inequalities (Giullari and Lewis 2005; Hobson and Fahlén 2009). Robeyns identifies three central advantages of the CA in analysing gender inequalities. Firstly, its individualistic nature recognizes women as independent from the family unit or wider entities and, simultaneously, permeable to the influence of social relations and institutional structures. Secondly, it addresses capabilities and functionings both in market and nonmarket settings, which is especially important as women spend much more time than men outside the market and essential aspects of their well-being (as care and domestic work, among others) are situated at the

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<sup>10</sup> Thus Browne et al . argue that *«social rights are to be understood as part of the process of institutionalising capabilities»* (2002: 5)

household level. Finally, the consideration of human diversity as a fundamental aspect of equality (Sen, 1992) validates one central feminist argument, that *«gender-neutral terms frequently obscure the fact that so much of the real experiences of ‘persons,’ so long as they live in gender-structured societies, does in fact depend on what sex they are.»* (Okin 1989, 11). In other words, women and men are not equally influenced by the same individual, social and environmental factors and a gendered analysis of strategies for WFB must therefore bring out hidden biases in each one of them. In sum, gender equality becomes a matter *«...of equal substantive or real freedom to choose beings and doings and is applied to all universally. (...) It follows that (...) there must be equal freedom on the part of men and women to choose between alternatives (e.g. between work and care).»* (Giullari and Lewis 2005, 90).

Notwithstanding the centrality of capabilities as an evaluative space for WFB, different authors argue that there is indeed a strong relation between the two evaluative spaces, that of functionings and that of capabilities or, more broadly, between outcomes and structures of opportunities (Robeyns 2003b; Phillips 1995; Crompton, Lewis, and Lyonette 2007). In the case of group inequalities, as those pertaining to gender differences, this becomes particularly significant as it openly opposes the theories based on individual preferences. As Robeyns puts it, *«for group inequalities (...) inequality in achieved functionings implies inequality in capabilities, except if one can give a plausible reason why one group would systematically choose different functionings from the same capability set.»* (2003b, 84). This theoretical principle will be at the core of this study's model of analysis, tying inequalities in achievements to inequalities in capability sets for work-family balance.

### **1.3. Model of analysis for work-family balance**

This study builds partially on Hobson and Fahlén (2009) who have adapted this framework to the analysis of capabilities for WFB in the European context, highlighting the role of three levels of conversion factors: individual (micro level); institutional (meso level) and cultural (macro level). As already stated in section I.1, the question of reconciliation between work and family responsibilities became more pressing in European societies during the second half of the XX century, in a context of rise in women's employment while remaining as the primary (or only) carer. The resulting

imbalances between time spent at work and in personal and care tasks affect mostly families with care responsibilities impacting on their overall well-being levels and placing this issue at the centre stage of the European political arena. Indeed, WFB has clearly become a central value for both women and men in Europe, as recent attitudinal data reveal (European Social Survey 2010).

Following Sen's conceptualization of capabilities as context-specific, Hobson and Fählen develop a model of analysis of the capability to balance work and family in European societies underpinned by one main principle, that caring and labour market participation are equally valuable functionings. At the theoretical level, it allows for the valuation of care work «*as something that is worthwhile and necessary*», independently from different preferences and/or utilitarian gains from women and men (Giullari and Lewis 2005, 87). The concept of capability to balance work and family responsibilities thus refers to the ability to choose among a set of different combinations of employment and care, disentangling «*the problem of defining exactly what men and women should contribute to families*» (Lewis 2009a). In this sense, instead of presuming that there is an ideal division of work and care that would suit all working parents (typically adding work to care), a capability-based model aims at identifying WFB alternatives.

The main conceptual problem is that men's freedom to choose between work and care may in fact limit women's choices which are made in a context of unequal power relations; hence the reconciliation of the goal of equality with the necessary freedom to choose between available options may prove to be a challenge. Indeed, the fact that women undertake the majority of the care work seriously constrains their ability to achieve their desired functionings, a limitation that men generally do not face. In that sense, if the aim is equality of freedom to achieve the same capabilities set, then conditions should be promoted that foster the sharing of care work both between the household and the market but above all between women and men in the household, namely at the level of specific legislative underpinning. In fact, analysing reconciliation policies in the perspective of capabilities means focusing on two main criteria: whether they enable care work both in formal settings and in home, rewarding it accordingly, and whether they enable paid work, ensuring the access of women to quality jobs.

When applied across different institutional contexts, the CA facilitates the recognition and understanding of the mechanisms that play a part in structuring gender inequalities in WFB. This leads to the core of the CA, the universe of multi-level

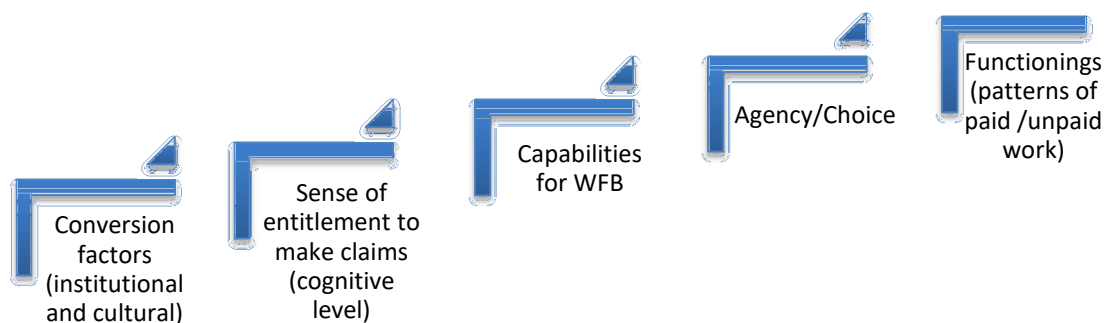
constraints that limits the set of work-family arrangements that are actually available to families and which are represented by the conversion factors.

As in Sen's original model, the institutional factors play a decisive role in women's and men's opportunities for WFB. On the one hand, the policy environment plays a key part in defining who does the caring in different societies both by means of national legislation and of EU directives. The nature of parental leave entitlements, particularly whether they are structured as social rights, and of care benefits and services are especially decisive and have been extensively studied by gendered analyses of welfare regimes. Furthermore, the institutional factors also entail aspects of the labour markets, above all what concerns the social quality of jobs (Drobnič and Guillen Rodríguez 2011; Dahl, Nesheim, and Olsen 2009). This entails multiple aspects as working time and intensity, job security, financial rewards, and levels of segregation, among others. In particular, the analysis of working time regimes can reveal important limitations on parent's possibilities for reconciling work and care, especially insofar as they are deeply gendered.

Finally, the set of factors that operate at the macro level – cultural – encompass norms around gender, care and employment. As argued, cultural norms, specifically those regarding the ideal division of labour, are an essential dimension for understanding how capabilities - and inequalities in capabilities - for WFB are shaped. The role of gendered norms and values has been incorporated in WFB studies by Hobson, Fahlén and Takács (2011), being treated as inhibitors or enhancers of a sense of entitlement to make claims for WFB. This cognitive mechanism precedes the ability to exercise the rights made possible by the institutional sphere, thus linking entitlements to the ability to make claims for WFB and strengthening agency freedom, that is, capabilities. Gender norms act as mediators in this space and thus attain a crucial role in analyses of WFB with a gender focus.

Figure 1 illustrates this study's analytical model, integrating this subjective state of efficacy as the real freedom to make choices or imagine alternative work and care arrangements. In fact, what one perceives as an alternative is closely linked with one's expectations about what is feasible or imaginable.

**Figure 1 – Capability-based model of analysis for WFB**



Source: own elaboration based on (Hobson and Fahlén 2009; Hobson, Fahlén, and Takács 2011)

Taking the case of paternity entitlements, if a paternity leave coexists with traditional gender norms, which attribute the role of carer almost exclusively to the mother, fathers may conform to gendered expectations without taking the available options into account. In this case, there is a tension between the policy and the normative levels which limits fathers' ability to make claims for WFB. It is nonetheless important to underline that, as already argued, such tensions often lead to social change and may progressively result in an increasing ability to challenge gendered norms both in the workplace and in the household.

Even though recognizing that institutional norms are crucial to convert individual resources into capabilities, this model does not assume a direct chain of causality – the integration of micro, meso and macro-level processes are in fact essential to the explanation of cross-national and within-case variations. The interplay of the institutional and the cultural levels are manifest both in the way cultural norms are embedded in institutional contexts and also in the perceptions of what individuals expect from the state, that is, whether they consider it as a resource for solving work-family imbalances (Hobson 2015; Lewis 2009a; Crompton, Lewis, and Lyonette 2007). Furthermore, despite the centrality of the institutional dimension, this model does not aim at developing measurements or benchmarks for policy design, but rather at assessing how resources are converted into agency for WFB and what the capabilities for individuals to choose to do so are. Several studies have adapted Hobson and

Fáhlen's capability-based model in analysis of issues related to WFB, focusing on different dimension of the capabilities gap and on distinct sites for making claims – the household or the firm – (Hobson, Fahlén, and Takács 2011; Fagan and Walthery 2011; Den Dulk et al. 2011; Drobnič and Guillen Rodríguez 2011; Mrčela and Sadar 2011). Building on this literature, the next section outlines the study's framework of analysis.

## **2. Operationalization and hypotheses**

This study conducts a capability-based analysis of gender inequalities in balancing work and family life in the Iberian countries in the last three decades. This section introduces its analytical model, the selected variables as well as the manner in which it relates to its main research questions. As noted, it builds on previous works which have adapted the CA to the assessment of capabilities for WFB. Then, hypotheses are formulated.

In chapter I, the main research goal of this study was defined as examining the extent to which opportunities for WFB vary in Portugal and Spain, between the early nineties and 2012 and further to determine their influence on gendered patterns of paid work and care. Hence, the central hypothesis of this dissertation is that equality in opportunities for WFB should contribute to a more balanced gender division of paid and unpaid work. Upon examination of different theoretical perspectives that account for the variation of strategies for combining employment and care, it became clear that they fail to take into account the broad societal context in which people's agency occurs. The CA, underpinned by the concept of situated agency, allows for a better understanding of the multi-level factors which shape options for WFB and hence of patterns of employment and unpaid family work. Adopting the CA as the framework of analysis, within a gender perspective, entails the assumption that the broader the set of unconstrained choices available to men and women, the broader the capabilities to balance work and family.

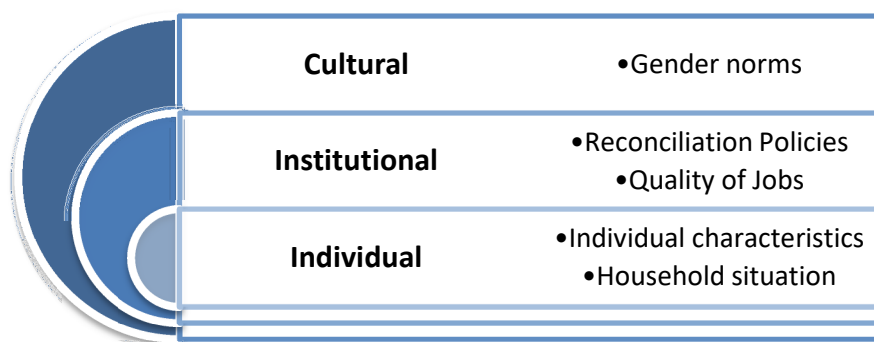
This study initially assesses women's and men's achievements regarding two valued functionings, the participation in the labour market and in unpaid family work. Previous sections have demonstrated how the work and family spheres interact and deeply influence each other and should therefore be evaluated in tandem. As noted, from a gender perspective, the integration in the labour market holds two main

consequences for women: higher levels of financial independence and personal autonomy and, on the other hand, the so called “double burden”, or the accumulation of paid working hours with family responsibilities, namely domestic and care work. The analysis of objective empirical data will enable the assessment of the gendered divisions of paid and unpaid work across time and between the two countries. The research will combine data on achieved functionings and on satisfaction levels with work-family arrangements. It thus taps into the cognitive level, linking the individual’s perceived alternatives – hence, expectations - to achieve WFB to the objectives actually achieved. The assumption is that the more opportunities one has to fulfil the desired work-family arrangement, the higher the satisfaction level should be. For that end, the study uses data regarding the satisfaction level of individuals with the balance of time spent in paid work and other life dimensions. Despite the significance of this information, it must be carefully analysed due to the adaptation of expectations to the situation the individual is living, especially women. It is essential, for this reason, to consider the broader institutional and cultural context in which achieved functionings and perceived alternatives to WFB are embedded. This is what the model considers next.

One main assumption of the CA is that choices are made within a universe of incentives and constraints, thus allowing for an assessment of the factors that limit or broaden women’s and men’s possibilities for WFB as well as for a more complete understanding of the way in which the different dimensions interplay. This model addresses a set of multi-level factors from a gender perspective with the purpose to determine what options are open or closed for women and men in the selected cases. It therefore acknowledges the possibility of change over time, which is especially important when addressing decisions on work and care which are renegotiated as external circumstances change. As the temporal scope of this study includes the period of the economic and financial crises it is essential that the model of analysis acknowledges the dynamic relation between conversion factors and capability sets for WFB.

As outlined in previous sections, Sen and other authors proposed similar typologies of conversion factors adapted to the type of capabilities under investigation. This study focuses specifically on the assessment of capabilities for WFB in the Iberian countries and identifies the following conversion factors operating at the micro, meso and macro levels:

**Figure 2: Multi-level conversion factors for WFB**



Source: own elaboration based on (B. Hobson and Fahlén 2009; B. Hobson, Fahlén, and Takács 2011)

As Figure 2 illustrates, possibilities for reconciling work and family are shaped at different levels, starting at the individual dimension. Both individual characteristics, as age and gender, and household characteristics, as type of partnership and existence of children, will be taken into account when evaluating the relation of the institutional and the cultural dimensions with capabilities for WFB.

The institutional dimension entails both the policy environment and labour market characteristics. The role of the state in supporting parents to combine paid work and family responsibilities translates in reconciliation policies which have the potential to promote more equal capabilities for WFB. By emphasizing the importance of both genuine choices and the conditions for their realization, the CA allows for the justification of policies which promote a more balanced division of paid and unpaid work. As Lewis and Giullari, «*gender equality in capabilities for paid work and for care highlights the need for a combination of a variety of social entitlements, and brings to the fore the issue of time as well as money.*»(2005, 91) This does not imply that reconciliation policies produce capabilities but rather that they can expand the scope of alternatives for an individual's potential to achieve a desired functioning: his or her capability set. The concept of agency and capabilities gap in WFB confronts how particular institutional settings can provide more opportunities for converting rights into capabilities for WFB or reinforce existing gender inequalities.

Acting on the nexus of labour market and family, parental leave designs can have a profound impact on WFB, as they help parents return to their workplace after the period of job-protected leave and they allow both parents to stay at home to care for their young children. The impact of leave policies is nevertheless ambiguous: on the one hand, *the existence of paid parental leaves is expected to impact positively on the options available for WFB and paid paternity leaves, in particular, should contribute to a more balanced division of care work*; however, *long paid maternity leaves are expected to impact negatively on the participation of women in the labour market, contributing for the erosion of their human capital and reducing opportunities for promotion.*

Unlike parental leave policies, affordable and accessible childcare services tend to have an unambiguously positive influence on the possibilities for WFB, by making it easier for parents to participate in employment while reducing the hours of care work. This is especially significant for women, usually the prime carers. Therefore, *the availability of affordable, accessible and high-quality childcare services is expected to impact positively on the options available for WFB.*

Childcare tax-benefit systems are another reconciliation instrument which strongly impacts on childcare affordability, a central determinant for women's participation in the labour market or specialization on unpaid work at home. The financial cost of childcare is an especially important variable, as women from lower income families will be more likely to abandon their jobs when facing higher childcare costs or, in turn, resort to informal care when available. Therefore, *the existence of tax concessions, fees reductions or cash benefits towards childcare should impact positively on the options available for WFB.*

Removing institutional obstacles that restrict women's and men's options for WFB involves the consideration of labour market features related to the quality of jobs, which impacts women and men differently. The potential earnings depend not only on the human capital resources but also on the patterns of occupational segregation of the labour market. This is especially true for women, as they are often employed on less qualified sectors than men, hence with lower earnings. The segregation level of the labour market is often related to the difference in earnings between women and men, that is, the gender pay gap. Therefore, *lower levels of occupational segregation of the labour market and a low gender pay gap are expected to impact positively on the*

*options available for WFB*. As already stated, not only money but also time is a crucial element for WFB possibilities. In that sense, it is important to consider the role of working time, insofar as working long hours limit the time available for care work. The assumption is that *the individualization of working time should contribute positively to the options available for WFB*, thus enabling both mother and father to be involved in care work.

The cultural dimension provides the broader filter through which resources can potentially be converted in capabilities for WFB. As argued, work-family arrangements also reflect prevailing values on the gendered division of work and alternatives made possible by institutional conditions might not be taken into consideration due to traditional gender norms, lowering people's expectations for WFB. On the other hand, policies can also reflect gender norms on family and employment, maintaining the *status quo*. In this study, the hypothesis is that *the prevalence of modern values towards family and gender roles should impact positively on capabilities for WFB*.

The freedom to choose the preferred work-family arrangement, the basis of the capability perspective, implies that different groups of women and men will favour diverse solutions, depending both on the institutional environment and on the normative context. The adoption of the CA framework involves supporting the maximization of choices for women and men in relation to paid and unpaid work – and this is what this research intends to assess.

In the following section the methodological considerations are presented, introducing the research strategies as well as data and methods of analysis used.

### **3. Methodological Framework**

This section sets out the research strategy that will be employed in the subsequent chapters. It begins with an outline of the comparative method that will be used. It then justifies the selection of cases and the strategy it followed. Finally, it introduces the data that will be used to test the hypotheses.

### 3.1. Comparative method

According to the framework outlined in chapter II, this study discusses the multi-level incentives and constraints that men and women face in Iberian countries and how they affect the capability to balance work and family life. To that end, the selected countries will be treated as multi-dimensional units which will be examined over time through the comparative method of analysis.

Despite aiming at establishing empirical relations between variables, the comparative strategy further seeks to understand how the selected institutional and cultural factors interact over time and produce distinct capabilities for WFB. In that sense, though this study builds on a model of analysis which has been generally applied to European societies the results should be regarded as historically specific to the Iberian cases. It thus entails institutional and survey analysis as well as historical and cultural insights, which are unified using the narrative approach. It entails statistical analysis based on survey data as well as analysis of secondary literature and of literature on institutional reform processes. The resulting patterns will be analysed using two qualitative data analysis strategies, analytic comparison and narrative analysis. On the one hand, it will seek to emphasize the effect of particular configurations of conditions while focusing on the historical sequence of events.

The study is also explicitly diachronic. As both outcome and explanatory variables are expected to change over time, the influence of both institutional and cultural dimensions on WFB capabilities and further on work-family arrangements will be assessed in several points in history. The selected time frame for this research spans from the early nineties to 2012, given that in both countries the most significant policy changes regarding reconciliation occurred within this period and it allows for the maximization of variation in outcomes, namely in female employment patterns. In both cases legal dispositions concerning work-family reconciliation were introduced in 1997, which, in the case of Spain, culminated in the Reconciliation Law<sup>11</sup> two years later. Nevertheless, these changes take place in a context of two consolidated democracies, restored political stability, liberal open market economies and effective welfare institutions. Also, in 1986 both became part of the European Economic Community (EEC), a key event in the completion of the democratic consolidation. This time frame also allows for the consideration of the “crises context”, which led to wage cuts and

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<sup>11</sup> Law 39/1999.

higher unemployment levels in both countries as well as to cuts in social expenditure and to an increase in family subsidiarity. As a context of major transformations both at the institutional and at the cultural level, this period plays a decisive role in enlightening the role of these factors in changing WFB capabilities and ensuing strategies for work-family articulation.

### **3.2. Case selection strategy**

The case selection strategy used in this study is the “most-similar systems design” (Lijphart, 1975), addressing two countries belonging to a common geographical area with similar historical, cultural and economic traits – Southern Europe. There is extensive literature on Southern Europe and the concept has been widely adopted on the political science and sociology fields due to its usefulness for analytical purposes (Fernandes 2017; Gunther, Diamandouros, and Sōtēropoulos 2006; Katrougalos and Lazaridis 2003; Malefakis 1992; Sapelli 1995 among others). In contrast, works on the two Iberian countries are not as widespread despite its comparative interest.

In fact, regarding specifically Portugal and Spain, both went through a process of late state-assisted industrialization, have experienced right-wing authoritarian regimes and transitioned to democracy in the mid-seventies thus acquiring relatively recently identical civil, political, economic and social rights. The idea of social citizenship, specifically, has been instrumental during democratic transitions in Iberia in exposing and dismantling inequalities inherited from the previous regimes. While the evolution of the recent decades can be explained by the combination of socio-economic development, democratization and Europeanization, patriarchal cultures from pre-democratic periods and corporatist legacies still have a significant effect on the institutional and cultural dimensions under analysis in this study. Regarding social protection models, in particular, both countries exhibit facets of fragmented and polarized systems with a strong focus on family provision and, additionally, of significant labour market segmentation with a wide protection gap between insiders and outsiders (Ferrera 1996; Silva and others 2002; Naldini 2003; Karamessini 2008; Saraceno 2006; Guillen and Petmesidou 2008 among others). In this regard, it is important to emphasize the strong role played in Iberia by the Catholic Church and the Catholic social doctrine, which stresses the importance of the principle of subsidiarity, that is, governments should not intervene in matters that can be resolved by families or

communities. Despite acknowledging the fact that social protection systems in South Europe are not uniform, these general similarities do indeed impinge on the characteristics of reconciliation policies and of available jobs which constitute central axis of capabilities for WFB. At the normative level, though still exhibiting traits of the traditional gender order - as the traditional division of care work and low levels of female political participation -, both reveal moderately modern attitudes on family and gender roles, yet with stronger maternalist traits in Portugal (Wall 2007).

In fact, despite sharing many historical and structural patterns, the transitions to democracy were marked by distinct processes - the Portuguese revolution and the Spanish consensual regime change - which, according to some authors, would bring about significant divergences at different levels (Fishman 2010). Of particular interest to this study is the “Iberian employment paradox”, which identifies the divide in employment levels in the two countries, namely the persistently high female unemployment in Spain (Blanchard and Jimeno 1995; Glatzer 1999; Royo 2010). As noted in previous sections, despite the notable integration of Spanish women in the labour market in recent decades, patterns of gender division of paid work are still distinct in both countries, with Portuguese women – especially mothers – being more intensively engaged in employment than their Spanish neighbours (Alcañiz and Guerreiro 2009).

At the policy level, while in Spain a large array of gender equality laws have been approved by the Socialist government in the early 2000’s with the support of women’s movements, in Portugal there is not a similar public visibility of these issues, except for the case of abortion (Prata 2007). In contrast, the Portuguese transition to democracy was characterized by a markedly egalitarian juridical order which implied the immediate enforcement of gender equality rights (Rêgo 2010; Monteiro 2010). Similarly, child benefit policies also went through considerable reforms after the revolution, while in Spain it was not until the early 2000’s that they gained relevance (Bianculli and Jordana 2013; Escobedo and Wall 2015). Regarding reconciliation problems, they are not the most prominent among gender equality policies in either country, coming next to questions on intimate citizenship and gender-based violence. This is interesting insofar as employment issues are among the most debated in Portuguese society, yet not from a gendered perspective (Espírito-Santo, Prata, and Fernandes 2007).

### 3.3. Variables – data and sources

This section focuses on the operationalization of the concepts laid out on previous sections. The empirical analysis will be performed on data from international surveys and country-specific legal texts, which contain considerable information at the individual, institutional and cultural level, while including the historical dimension.

As already referred, some authors have pointed out that the operationalization of analysis based on the CA presents some challenges as Sen's framework does not designate a specific method of enquiry. This in fact an opportunity to employ the methods and techniques more relevant to each research, bearing in mind that «*the spirit of the Capability Approach is to use multiple types of info, not just one*» (Comim, Qizilbash, and Alkire 2008) with a focus on the advancement the capabilities of individuals over time to live the life they value. In that sense, when investigating the reconciliation of work and family responsibilities, the goal is not to define what the optimal amount of paid and unpaid work for women and men would be, but rather to identify the possibilities to make alternative work-family arrangements and the institutional and cultural constraints that they face in doing so.

#### Dependent variable

The dependent variable under consideration is the work-family arrangement as in the form of distribution of paid and unpaid work in dual-earner families in the context of competing work and family responsibilities. It will be assessed using descriptive statistics and secondary literature in the following dimensions: the extent to which women and men are involved in paid and unpaid work and their satisfaction level with that arrangement.

One important data limitation is that the surveys were not specifically designed with the assessment of WFB in view. Specific Eurostat modules for reconciliation of work and family life are only available for the years 2005 and 2010 and did not allow for the necessary longitudinal analysis. Nonetheless, the featured variables are similar to the ones used in this study. According to the model of analysis outlined in the previous section, the resulting patterns will be segmented taking into account individual and household characteristics, namely age and the existence of children in the household.

In order to achieve the first objective the European Labour Force Survey (LFS) will be used. The data focuses on the population between 25 and 54, which are the women and men more likely to work and to be parents. Firstly, the *employment rate of men and women with children* reveals the differences between mothers and fathers to the extent to which they engage in paid employment. Next, a more detailed picture is given by the *proportion of mothers and fathers employed part-time and full-time*, as employment patterns by gender tend to vary greatly depending on the intensity of work. While data on employment rates go back to the early nineties, allowing for a maximization of variation in results, when filtering for the presence of children in the households, the availability of data starts only in 2005.

The second dimension, the involvement in unpaid work at home, will be assessed using data from three waves of the European Quality of Life Survey (2003, 2007 and 2012). It translates the amount of time dedicated to household duties not remunerated by the market, both housework and childcare, as *hours per week spent doing unpaid work by working parents*. This data refers specifically to the working population, being therefore particularly suitable to the analysis of work and family articulation. The outcomes on unpaid work are based on the question: «*On average, how many hours per week do you personally spend on a) childcare, b) housework and c) caring for elderly or disabled relatives?*», which was addressed to women and men in employment. In this regard, a methodological note must be made. For the purpose of this study, only childcare and domestic tasks should be considered however, EQLS 1 uses data from the Eurobarometer 2003, which combines a), b) and c) in the same question. Hence, for comparative reasons, time spent on the three activities was also considered when analysing the unpaid workload in 2007 and 2012. One further note should be made regarding the results from EQLS 1: the question was asked only to women and men who reported that they performed any of these activities every day. Thus all unpaid work performed on a less regular basis remains unaccounted for. It follows that this sample is likely to over-represent women in their unpaid workload since they are more likely than men to perform informal family care work on a daily basis. Nonetheless it remains an important source of information for cross-country comparison given the scarcity of comparable data on time use.

The third dimension under analysis is women's and men's subjective assessment of their situation concerning WFB, which uses data from two waves of the European

Social Survey (ESS3-2006; ESS5-2010). The outcomes are based on the question «*How satisfied are you with the balance between the time you spend on your paid work and the time you spend on other aspects of your life?*» and the answers are based on a numeric scale ranging from «*Extremely dissatisfied (0)*» to «*Extremely satisfied (10)*». One limitation of these data is that theoretically satisfaction levels with work-life balance may differ from those more specifically pertaining to work-family balance. However, as already stated, the two terms are used quite interchangeably. Furthermore, the work-family relation is actually at the core of the ESS module and underpins a large set of questions on «*Family, work and well-being*», which also includes the selected indicator.

### *Independent variables*

According to the theoretical framework presented, the capability sets for WFB constitute the explanatory variables of this study. They will be derived from institutional and cultural factors or, in other words, it is the combination of institutional and cultural factors that result in differing capabilities for WFB.

At the institutional level, both policy and labour market features are analysed in order to assess whether and how they expand the scope of the capability set for WFB of working mothers and fathers. Concerning the policy environment, the existence of work-family reconciliation policies in both countries will be considered, namely their nature (provision of time, money or services) and level of assistance, or their effective use. For parental leave policies, the OECD Family Database will be used specifically indicators on *length and level of payment of maternity, paternity and parental leaves*. Childcare services will be analysed according to data from the Survey on Income and Living Conditions (EU-SILC) on *availability of childcare services and quality of childcare services*. Complementary information from secondary literature on *children in informal childcare* and *welfare mix in the provision of childcare* will be considered. Finally specific features of the fiscal policy as childcare tax-benefit systems and *net childcare costs* are examined from the OECD Benefits and Wages dataset.

The labour market features under scrutiny are directly related to the quality of jobs available for women and men and constitute an additional dimension of institutional factors. *Gender occupational segregation* levels will be analysed by

combining the IP-index<sup>12</sup> (1997-2007) with a tripartite classification of occupations into feminized, mixed and male-dominated (2005-2010). The *gender pay gap* and the *flexibility of working time* are assessed from LFS data between 1994 and 2012 in the first case and only in 2004 in the latter.

At the cultural level, gender role attitudes related to work and family will be assessed according to data from two waves of the International Social Survey Programme (2002 and 2012), which translates the level of agreement with the following statement: *A man's job is to earn money; a woman's job is to look after the home and family*. It will be combined with data from two waves of the European Social Survey (2004 and 2010) which in turn puts forward similar statements – *A woman should be prepared to cut down on paid work for the sake of the family* and *Men should have more right to job than women when jobs are scarce*. While both concern attitudes on gender roles they allow for the analyses of specific features as the position of women in the labour market both in relation to men and to the family.

The next chapter inaugurates the empirical part of this dissertation and analyses the different facets of work-family balance in Portugal and Spain, namely the patterns of paid and unpaid work as well as satisfaction with the resulting arrangements.

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<sup>12</sup> The standardised or Karmel and MacLachlan index.

## **Chapter III – Facets of Work-Family Balance in Iberia**

### **Introduction**

This chapter is concerned with the visible aspects of work-family balance in Portugal and Spain that is, the patterns of articulation of employment and family life, whether they reveal a gendered pattern and further how they have changed over time. This question is derived from the data introduced on chapter I, regarding the persistence of significant gender gaps in the division of paid and unpaid work and according to which the increase in women's employment during the last decades has not been matched by a similar growth of men's participation in unpaid work. The historical context will underline the fact that these asymmetries have been especially persistent in the Iberian countries, due to the legacies of authoritarian regimes.

As developed in chapter II, underlying this research is the theoretical assumption that the participation in both employment and care work are two valued outcomes for women and men in the European context, hence central features of their well-being. This chapter will accordingly assess the extent to which women and men are unequally involved in paid work and care as well as their satisfaction with that arrangement, thus focusing on the more narrow evaluative space of achieved functionings. In fact, the selected data on employment and care can be considered as the result of an act of choice over existent options, hence a subset of capabilities. However, and despite the fact that inequalities in paid and unpaid work can point to unequal opportunities to work and care, it is important to highlight one more time that functionings do not equate capabilities. Notwithstanding its centrality in outlining the empirical puzzle that drives this research, Sen (2009) specifically emphasizes the insufficiency of an approach relying solely on functionings data for different reasons: firstly, observed outcomes or achievements do not necessarily derive from free choice and secondly, they do not reflect the set of alternative options over which it was exerted. Indeed, instances of these limitations will become evident throughout this chapter which, operating on the evaluative space of functionings, combines data on outcomes and on satisfaction levels, thus attempting to link the individual's perceived alternatives to the goals actually achieved.

Using descriptive statistics from several rounds of large-scale surveys (the European Labour Force Survey, the European Quality of Life Survey and the European Social Survey), this cross country longitudinal analysis seeks to answer the following main research question: *How have gender differences in the articulation of work and family responsibilities changed in Portugal and Spain between the early nineties and 2012?*

## **1. Legacies**

As discussed in previous chapters, both Portugal and Spain are generally included in the Southern European or Mediterranean welfare, gender or care regime. The classifications are numerous and vary according to the welfare regime characteristics they rely upon: decommodification, gender arrangements, and family policies, among others. Nonetheless, the Iberian countries are invariably characterized as strongly familialistic societies, the family being the main source of social support, with only residual family policies and a very limited support for female employment. As pointed out by several authors, this is an extremely simplistic characterization of the southern European societies namely regarding the way in which care is organized. Bettio and Plantenga (2004) have explicitly pointed out the Portuguese specificities concerning this facet of WFB, as it combines low levels of informal care with high levels of female employment and, interestingly, low formal care resources. Spain, on the other hand, is a more typical case within this country cluster.

Indeed, the incorporation of women in the labour market holds importance not only important in quantitative terms but also in terms of the challenges it poses for contemporary welfare states. The set of transformations that both countries underwent in the recent decades, though at different paces, had significant effects on the erosion of solidarity networks based on family relations, the cornerstone of the south European welfare regime (Branco 2017). In the Portuguese case, the early incorporation of women in the labour market resulted in the scarcity of this source of unpaid family work which represented a very important challenge that the democratic welfare state had to tackle. It is therefore important to provide an historical background which clarifies the influence of the authoritarian regimes and the democratic transitions on the patterns of paid and unpaid work as well as on work-family policy institutions. The present chapter focuses the first while chapter IV will address the latter.

As already argued, «*the two societies share so many structural features and historical experiences (prior to the 1970s) that the contrast between them approximates the status of a “natural experiment”*» (Fishman 2010, 283). Both countries have experienced almost half a century of strict dictatorship, roughly from the early thirties to the middle seventies. The authoritarian regimes led by Salazar in Portugal and by Franco in Spain were strongly influenced by the Catholic Church even though, particularly in the Portuguese case, it lost some of its leverage in the sixties, after the Second Vatican Council (1961) and during the rule of Marcelo Caetano (1968-74). Nonetheless, legislative documents in both countries mirrored many aspects of the Catholic social doctrine and highly conservative family values. A strong sense of male-chauvinism and patriarchy was dominant in gender relations and hence in the division of paid and unpaid work. The prevailing gender contract was centred in the dichotomy male-breadwinner/female carer and, despite many women being forced to perform paid work to contribute the family income, the male-breadwinner model was a symbol of the authoritarian regimes, a model to aspire to (Aboim 2010b, 39). Established policies thus ensured women were subordinate to men and valued only in the domestic field and this came to be one of the points of protest against the regime<sup>13</sup>.

In fact, despite similarities, the two countries featured two distinct scenarios on the road to democratization and in the decades that followed the end of the dictatorships. Until the sixties, the political system maintained both societies culturally and socially isolated from the rest of the world with serious consequences for its economic development. However, in the last years of regimes there was a set of factors that increased the pressure for political and social change, among which increasing levels of economic development and liberalization, industrialization, education and even the rise of mass tourism in both countries (Barreto). These signs of modernization were, in general, more visible and state supported in the Spanish case while Portugal remained in a very difficult economic situation facing colonial wars and mass emigration to France (Royo 2010).

This period of some modernization also supported and instigated the need for change in the strict gender division of labour prevalent in both countries at the time and which would be mirrored most remarkably in the incorporation of women in the labour market. By 1973, women represented in both cases a very low share of the total labour

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<sup>13</sup> For more detail, see chapter VI on the development of gender cultures in Iberia.

force, just above 20%, as table 1 illustrates. This feeble incorporation in the labour market was more concentrated among single women in the case of Spain but also included married women in Portugal which, due to economic necessity and the shortage of male labour supply, added paid work to their family responsibilities. From 1974 forward, that is, from the end of the authoritarian regimes in Iberia, paths of incorporation of women in labour market diverged greatly and by 1979, Portugal's share of female labour force surpassed its neighbour's by over 10 p.p. and this relative advantage would be maintained during the decades to come.

**Table 1: Average female labour force as % of total labour force, 1960-97**

	<b>60-73</b>	<b>74-79</b>	<b>80-89</b>	<b>90-97</b>
<b>Portugal</b>	21,8	38,6	41,2	44,4
<b>Spain</b>	23,4	27,9	30,5	36,8

Source: own elaboration, from OECD 2000, 39.

The Portuguese case has since long puzzled researchers that seek an explanation for the high full-time activity rates of women and indeed, a very specific combination of factors gave rise to this exceptional case in the south European context (André and Feio 2000; Fishman 2010; Torres 2005; Ferreira 2010b). Firstly, as noted, both the colonial wars and the huge emigration movement throughout the sixties and early seventies caused a sudden rise of the labour force demand which was promptly filled by women, especially in the agrarian sector. This scenario was followed by a revolutionary context that in fact fuelled female employment in a much more effective manner than occurred in Spain. The revolutionary nature of the Portuguese context has in fact contributed for a deep reconstruction of the political and social orders and, not least importantly, of the expectations regarding gender roles, specifically. Despite sharing important patterns of democratization and modernization, Spain lagged behind this initial impetus of incorporation of women in employment. It can be argued that the consensus-oriented transition was not associated with such a radical cultural change as the revolutionary transition in Portugal which steered women to employment and, simultaneously, contributed to the alteration of the strict gender division of labour. As some authors

point out, «*the idea of 'the woman at home' has become an outdated stereotype, even in those regions where conservative cultural values predominate.*» (André and Feio 2000, 62).

While ideological conviction prevented women from being sent home even after the end of the colonial wars, legal reforms guaranteed equality of rights for female and male workers and thus secured legally protected jobs from early on. The rapid expansion of social services and of the tertiary sector in general further stimulated female employment. As noted, economic reasons have also been one of the most decisive factors for high female employment before and after the democratic transition, as low wages made it often impossible to maintain a single-earner household. In contrast, despite the fact that in the early seventies, Spain featured a more open and successful economy than its neighbour, this did not result in an equally successful incorporation of women in employment. On the contrary, during this period of economic development, the low unemployment rates were partially sustained by the fact that women, especially married women, were confined to their family related tasks.

Some qualitative studies have underlined the importance of economic independence and sociability that Portuguese women ascribe to paid work (Torres 2005). This pattern of stability in female labour market attachment is bound to have long term effects as it has become an undisputed part of life even though women are still responsible for the largest share of unpaid family work (Torres 2008, 41; Aboim 2010b). In fact, inequalities in the family sphere have resisted to the profound changes which have occurred in the field of paid work and, as this chapter will show, imbalances in the gender division of unpaid work are still the rule in both countries resulting in women's "double burden" (Alcañiz and Guerreiro 2009).

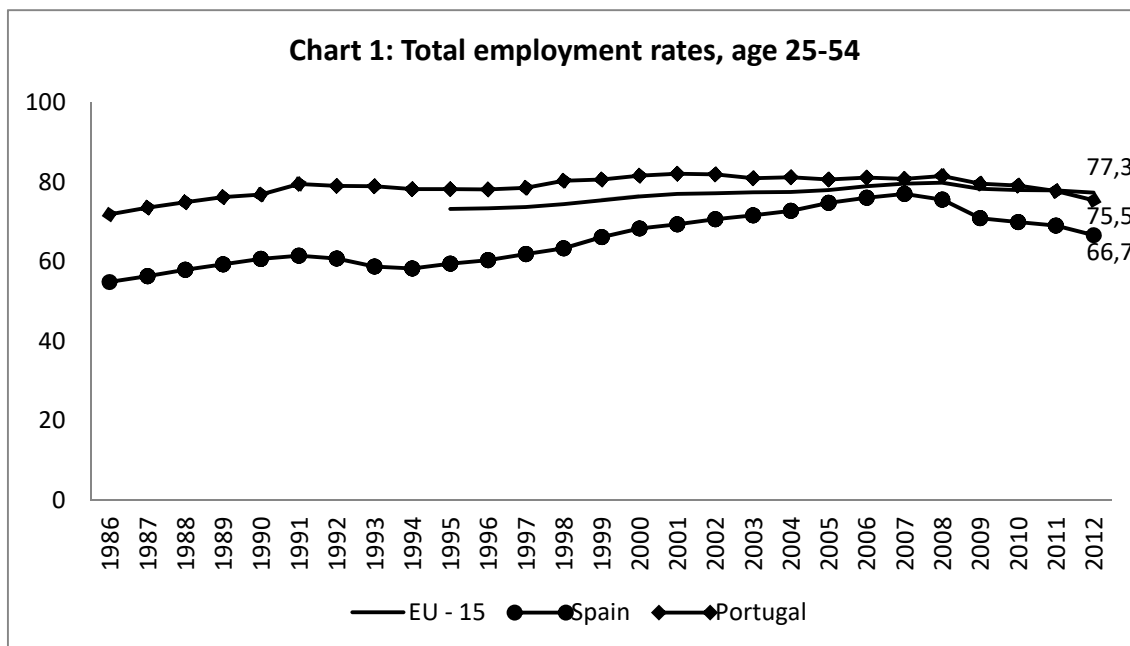
## **2. Gender and patterns of paid work**

Concerning the case of employment, the choice of indicators is especially significant (Burchardt 2002; Pfau-Effinger and Schwindt 2015). The analysis developed in this chapter uses the employment rate, thus considering only people who wish to be employed and found a place in formal employment. Furthermore, it will be ranked as fairly high if it reaches 60%, which concurs with the goal set in 2010 on the Lisbon agenda for female employment.

Furthermore, it should also be taken into consideration what is considered formal employment, as there are some areas of paid work which are not defined as gainful employment but rather as informal employment. The weight and type of informal employment may lead to situations where the female employment rates are in fact higher than the ones presented (Pfau-Effinger and Schwindt 2015, 44). In fact, women have always been involved in some type of paid work and comparatively more so in informal work, be it in the agrarian or in the manufacturing sector or, more recently in domestic and care services. In fact, the prevalence of these income maximizing activities in the informal or underground economy is a specific trait of south European countries but comparatively less so in Spain and in Portugal (Flaquer and Escobedo 2012; Tavora 2012a; Katrougalos and Lazaridis 2003).

### **2.1. Changing patterns of paid work**

Throughout the nineties until the early 2000's both Iberian countries show a positive evolution in total employment rates even though Portugal features a relative success in employment creation, comparing to the neighbouring country. As chart 1 shows Portugal remains consistently above the EU-15 average, whereas Spain never reaches this goal during the period of analysis. During the eighties and the nineties, in particular, employment rates reached unprecedented low values in Spain. Different factors have been pointed out as the drivers of these contrasts. Cabral (1999) underlines the fact that in order to supplement underpaid or irregular work, Portuguese workers combine several jobs, resulting in a high occupation rate which coexists with low productivity and low wages for both women and men. Others emphasize that the incorporation of women in the labour market itself can have positive consequences as it leads to the externalization of family work and hence paid employment (Fishman 2010). Moreover, the extremely generous unemployment benefits that existed in Spain in the eighties also represented a strong disincentive to work, and these schemes came to be curbed during the nineties. Additionally, industrial restructuring, the return of emigrants, the collapse of formerly protected firms and the dynamics of economic globalisation have further exacerbated this context of job scarcity (Katrougalos and Lazaridis 2003).



Source: own elaboration from Eurostat, variable: *[lfsa\_ergan]*.

As chart 1 illustrates, total employment rates in Portugal remain around 80% from the second half of the nineties until 2010, despite starting to drop in 2002 as a result of the country's economic stagnation. In contrast, Spain's economic performance in the early 2000's was considerably better which allowed the country to rise its employment levels closer to EU-15 average and Portugal in 2007, the point at which the country started facing the severe effects of the economic crisis, inflated by the burst of the construction bubble. Hence, from 2008 onwards, employment rates dropped radically in Spain (77% in 2007 to 66,7% in 2012). Overall, the employment outcomes in Portugal were more positive than in Spain, in the period under analysis.

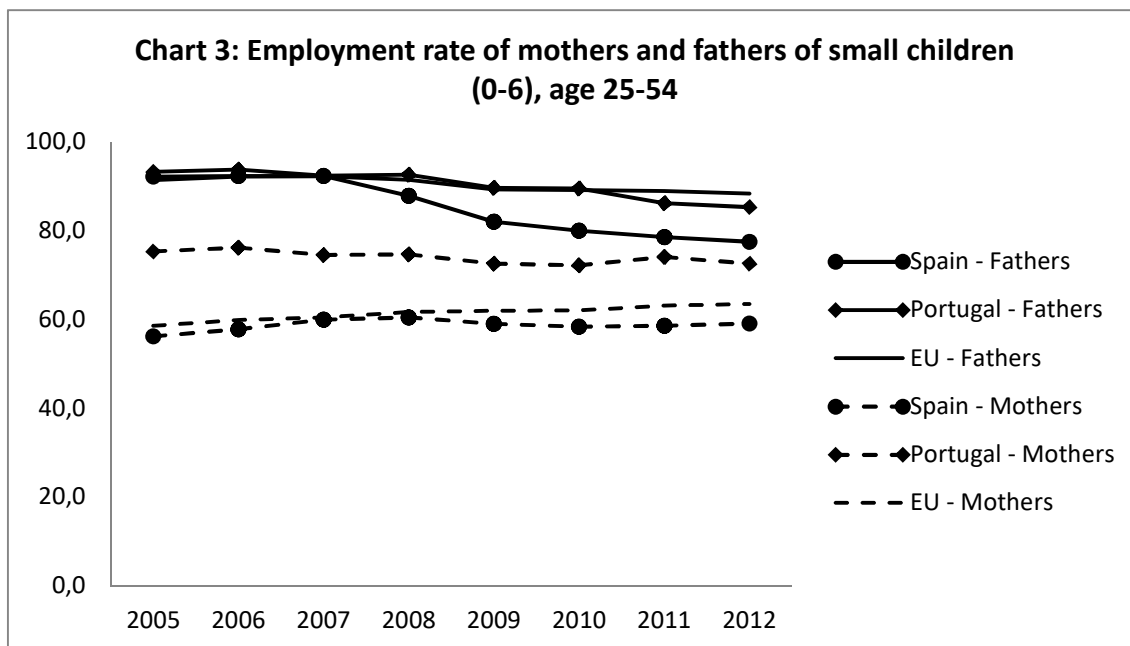
## 2.2. Gendered patterns of paid work

This research is particularly interested in examining the gendered variation of employment outcomes. Were women - mothers, more specifically - more or less successful than men in finding a place in formal employment? How have these patterns evolved through time? While charts 2 and 3 reveal gender differences in the attachment to the labour market, charts 4 and 5 provide a more detailed picture regarding the intensity of that relation, addressing the share of part-time workers, male and female. As stated, the analysis uses data from the *European Labour Force Survey*.



Source: own elaboration from Eurostat, variable: *[lfsa\_ergan]*.

As argued, the Portuguese female employment rate has always been an exceptional case in the south European context and has ranked consistently above the EU-average and above the Lisbon agenda goal of 60%. Chart 2 illustrates this pattern very clearly with the line corresponding to Portuguese female workers standing very close to their male counterparts and very distant from the Spanish female workers. This stands in line with data in table 1 which indicates that, as early as the nineties, the female labour force already accounted for almost half of the total labour force. This pattern has thus remained stable during the whole period of analysis. In the case of Spain, in contrast, it was only from the nineties forward that female employment rates increased significantly. In fact, at the time of the integration in the former EEC, the country featured the lowest share of female employment in the European context (Salido 2016). Despite rising more rapidly than in Portugal from the nineties until 2008, it has never reached the EU-average let alone the Portuguese level as chart 2 clearly shows.



Source: own elaboration from Eurostat, variable: *[lfsa\_ergan]*.

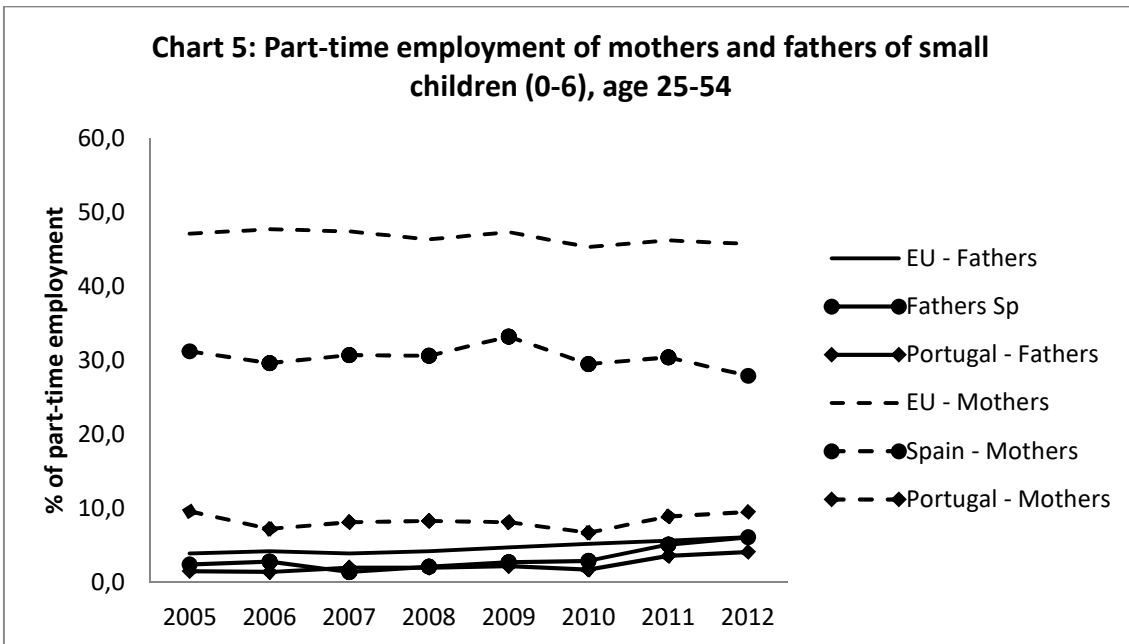
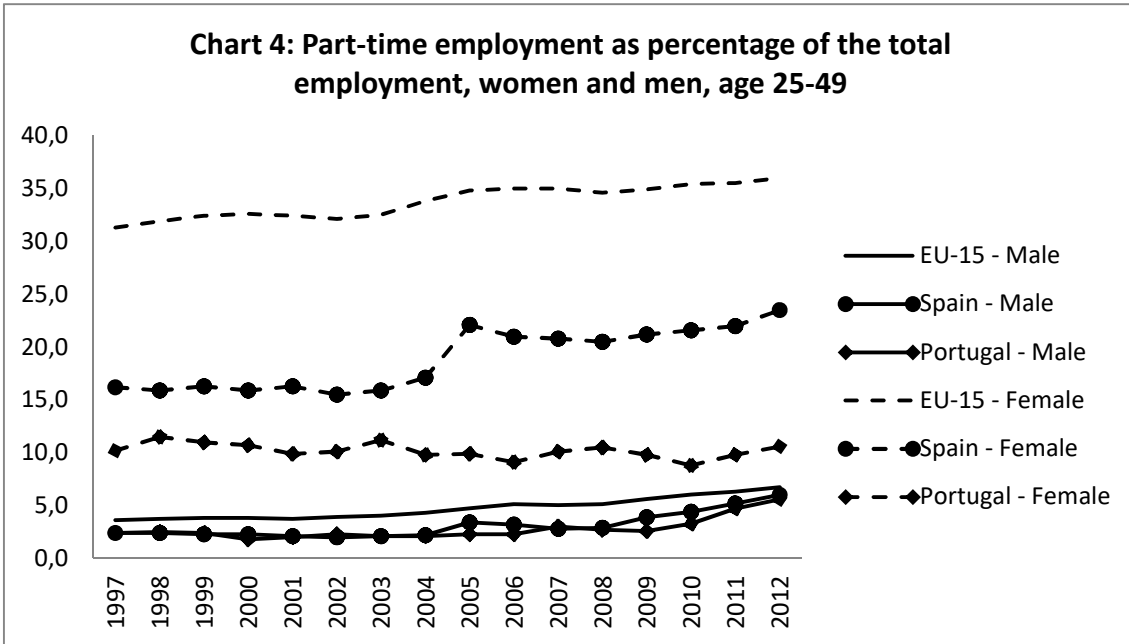
In Portugal, the gender gap in employment rates fell from 18% in 1997 to only 6% in 2012 and if we focus only on working parents (chart 3) the pattern of decrease is similar (18% in 2005 to 13% in 2012). Interestingly enough, the wider gender gap in working parents employment rates is not the result of a smaller share of women entering the labour market once they have children, but of a larger share of men participating in formal employment. This means that Portuguese mothers do not have significantly poorer employment outcomes compared to women of the same age group who do not have children<sup>14</sup>. The presence of women and mothers in formal employment steadily rises until 2008, slightly dropping (3/4 p.p.) by 2012. In the case of men and fathers, the descent starts earlier, in 2002 and is comparatively more dramatic (11 p.p. by 2012). This has to do with the fact that during the first phase of the economic crisis, predominantly male jobs (in the construction sector) were disproportionately more affected. This is the main reason for the decrease in gender gaps – not a strong rise in women’s presence in the labour market but a fall in male employment. Overall, in this period, women with and without children were able to maintain their presence in the market more successfully than men.

<sup>14</sup> Given that both groups show the same evolution pattern from 2005-2012, I assume that this is the rule for the former period of analysis 1997-2005 (as shown by available data).

When turning to the Spanish case, the more striking contrasts with its neighbour are in female employment patterns, as noted. Chart 3 further reveals that in Spain, the presence of women with small children in employment is lower (in average 5 p.p.) than in the absence of children, hence in Spain motherhood makes a difference. Some works add that besides motherhood, marriage also reduces women's chances to be employed, which seems to hold similarities with patterns of a very strict gender division of labour, despite developments in the last decades (Gutiérrez-Domènech 2005). Taking into account that male employment levels are somewhat similar in both countries, it follows that the employment gender gap in Spain is wider than in Portugal. Indeed, although the rise in female employment led to a decrease of the gap between 1997 and 2007, the narrowing of the gap in the crisis period was fuelled by the sharp fall in male employment levels, as occurred in Portugal. It is also interesting to point out that similarly to women, the gender gap for parents is wider than for non-parents.

The gender configuration of the Iberian labour force is translated both by the extension and the intensity of the female presence and while charts 2 and 3 have addressed the first characteristic, charts 4 and 5 now turn to the latter.

Whereas in the European context data shows that nearly half the working mothers with small children only work part-time, in the Iberian context, this value is much lower, especially in Portugal: around 30% for Spain and 8% for Portugal. Part-time work has globally registered a slight rise between 1997 and 2012 (similar for parents and non-parents) and appears to be less vulnerable to the crisis effect. South European countries have traditionally a low share of part-time employment and in this regard both Portugal and Spain fit this tendency. Nonetheless, the gendered variation it entails is even more radical than the one pertaining to global employment rates. As charts 4 and 5 show, while men's part-time employment does not impact significantly on the interpretation of the cross-country variation of general employment rates (variation of 1- 2 p.p.), the share of women working part-time in each Iberian country tells a different story. While the female share of part-time workers in Spain is on average 15 p.p. lower than the EU-average, in the case of Portugal this difference is of about 35 p.p.. Moreover, the variation is even more significant for women with small children, who tend to work less hours in Spain, but interestingly not in Portugal.



Source (charts 4 and 5): own elaboration from Eurostat, variable: *[lfsa\_epga]*.

Comparing the two countries (charts 2-5) it follows that in addition to representing a smaller share of the workforce, Spanish working women's presence in the labour market is less intensive than that of the Portuguese counterparts. Indeed, the graphic representation allows for the identification of an interesting trait of the Portuguese female workforce, that the level of female part-time workers is very close to the EU average of male part-time workers, even more so when they have small children.

In sum, Portuguese mothers are significantly more present in the labour market than in the case of Spain and in a much more intensive manner.

### **2.3. Assessing paid work outcomes**

According to the data presented, work outcomes in both Iberian countries have evolved positively since the late nineties until roughly the start of the 2008 economic crisis, which has affected predominantly male dominated employment sectors. From that point until 2012 the ability to find a job has become weaker for both Portuguese and Spanish fathers, but revealing a sharper drop in Spain. Regarding the share of women finding a place in formal employment, it has also raised between 1997 and 2012, and more significantly in Spain. However, despite this significant rise, the gender gap in employment is much wider in Spain than in Portugal as a result of considerably weaker employment outcomes of Spanish women, especially mothers. This pattern is replicated in the analysis of the intensity of work, where data reveals that even though the share of women and men working part-time has slightly raised in both countries, Spanish women have a more limited participation in paid work both in comparison to their male counterparts and even more so to their Portuguese neighbours.

In sum, data points to the fact that the Portuguese context has more effectively enhanced women's and men's ability to be employed, while Spanish women, especially mothers, display weaker achievements in paid work, especially full-time. While there are gender inequalities in paid work in both countries, they are manifestly larger in Spain.

The following sections will investigate the patterns in the involvement in unpaid work in both countries as well as the level of satisfaction revealed by working parents with the achieved arrangements.

## **3. Gender and patterns of unpaid work**

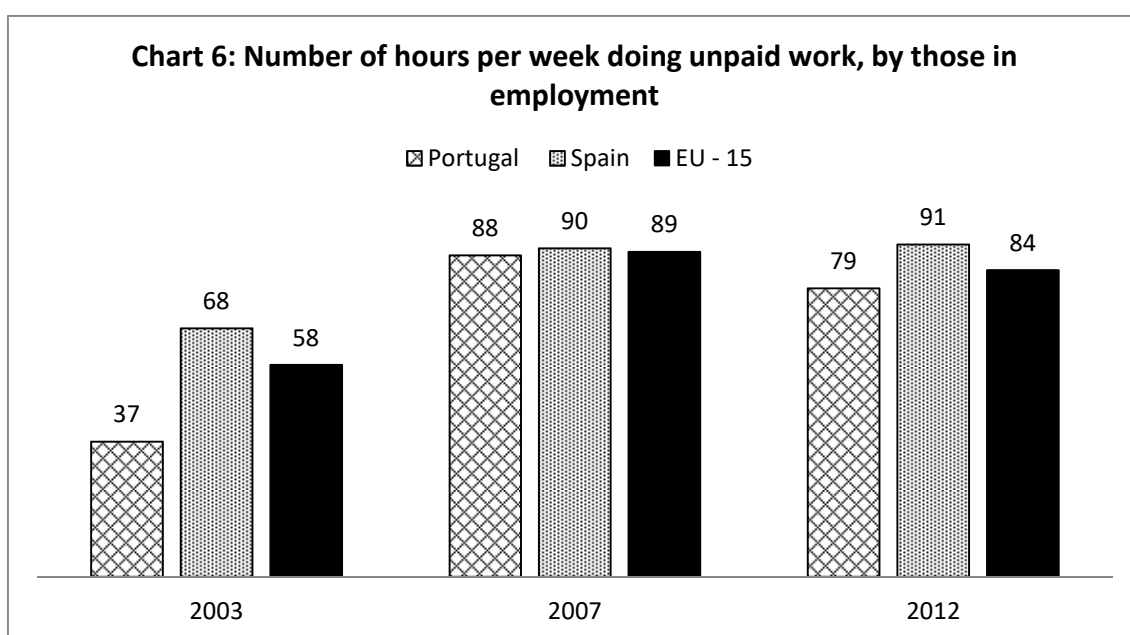
As framed in the theoretical model, to work and to care are equally valuable functionings. Deriving from previous research on the extension of social rights to care (Knijn and Kremer 1997; Glucksmann 2005), the presents analysis recognizes unpaid family work as an equal to paid employment and emphasizes the right to give care.

Yet, care work is included in the broader category of unpaid work which includes the most diverse activities: voluntary work, education, household tasks, childrearing, care for elderly and disabled, among others. This study refers specifically to informal family care work, that is, unpaid household or family work (Pfau-Effinger and Geissler 2005) and uses data from three rounds of the *European Quality of Life Survey* (EQLS 2003, 2007 and 2012).

### 3.1. Changing patterns of unpaid work

According to the data presented in chart 6, there has been a major rise in the total unpaid workload across Europe between 2003 and 2007. However, due to the already mentioned methodological discrepancies this change must be carefully analysed as there can be, in fact, a significant share of work unaccounted for on the basis of not being performed every day.

In the following five years the values become more stable despite the period of economic recession that takes place between the two surveys in 2007 and 2012. There is even a slight decrease to report, but not for Spain. This suggests that the levels of unpaid work are quite resistant to change, even when an economic recessive background would suggest that a higher amount of care and domestic tasks would be performed by the parents themselves.

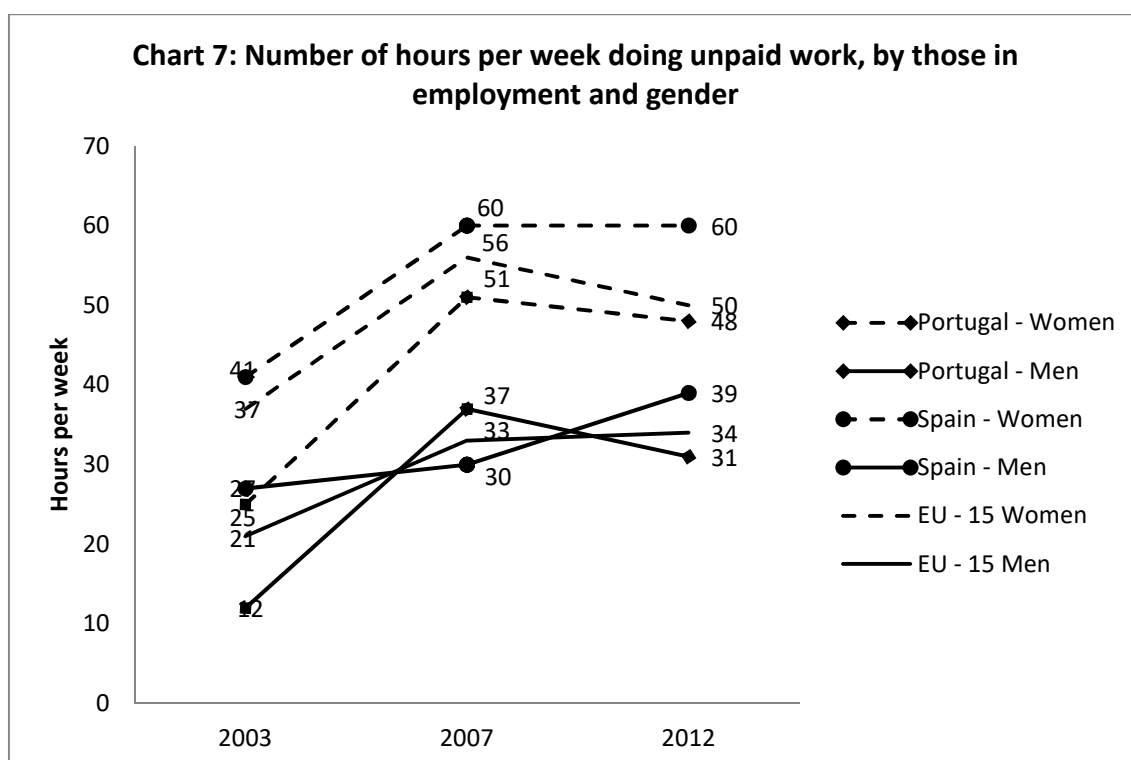


Source: own elaboration from European quality of life survey 2003, 2007, 2012.

Nevertheless, the cross country variation in 2003 which puts Portugal and Spain at opposite sides of the EU-15 average remains in 2007 and 2012, albeit less pronounced. In fact, despite belonging to the same welfare and care model, the Iberian countries vary significantly in the amount of unpaid work that working parents perform at home. In general, Portugal clearly stands out as the country with a lower level of unpaid work not only in relation to the neighbouring country but also to the EU-15 average while Spain presents an exceptionally high workload among working parents.

### 3.2. Gendered patterns of unpaid work

Unpaid family work is strongly gendered and despite cross-country and cross-model differences gender imbalances in the allocation of hours performing domestic and care tasks is evident. This division is clearly shown in chart 7 both for the Iberian countries and the EU-15.



Source: own elaboration from European quality of life survey 2003, 2007, 2012.

Even though a gender gap analysis (table 2) is a fairly intuitive manner of assessing imbalances in the unpaid workload it should be carefully complemented by data that reveals the source of those gaps. In fact, without that information it would not be possible to consider the fact that unpaid female work is much more stable than that performed by men, which is much more irregular, especially in Spain.

**Table 2: Gender Gap in unpaid work, in number of hours per week**

	<b>2003</b>	<b>2007</b>	<b>2012</b>
<b>Portugal</b>	13	14	17
<b>Spain</b>	14	30	21
<b>EU-15</b>	16	23	16

Source: own elaboration from European quality of life survey 2003, 2007, 2012.

As shown in table 2 and chart 7, as of 2003, although the gender gap in Portugal and Spain are slightly inferior to the EU-15 average, the Portuguese case is distinctive insofar as it displays a significantly lower weight of unpaid work both for working mothers and fathers. In fact, at this point in time, the average number of hours that Portuguese mothers devoted to care work (25) was inferior to those of Spanish fathers (27). This is a very revealing fact concerning the capability to care between the two cases rather than the gender imbalances within each country. The gender gap in Portugal remains stable in the three surveys only with a slight rise in 2012, which is mainly due to a substantial reduction of unpaid work performed by fathers. Spain and the EU-15, on the other hand, report a rise in male care work between 2007 and 2012.

Turning to the Spanish case the evolution of the gender gap is considerably more irregular. While in 2003 the Spanish gender gap (14) was, as in Portugal, lower than the EU average (16), the 2007 survey accounts for a sharp rise (30) going beyond the reported European gap (23) and more than doubling the Portuguese gap (14). As shown, Spanish mothers performed in average two times more unpaid work than their male counterparts. These are, in fact, the most polarized results of the three surveys, within

the selected cases. Even though the gap has been reduced to 21 hours in 2012, on account of a significant rise in male unpaid work, it is still considerably higher than the Portuguese (17) and the European (16) average. It is especially important to highlight that, in the Spanish case, the wide gender gap results primarily from a very high proportion of female unpaid work - in particular when compared to the Portuguese neighbours – regardless of their increasing incorporation in the labour market.

### **3.3. Assessing unpaid work outcomes**

According to the survey data presented, the participation of fathers in care work has not grown to the same extent as women have been incorporated in the labour market and this confirms previous studies (Conde-Ruiz and Artiñano 2016; Aboim 2010b). However, the initial assumption made in reconciliation models that the gender asymmetries would be generally more significant in Southern Europe does not stand, at least not for the Portuguese case. In fact, the two Iberian countries differ greatly regarding both the gender gap in unpaid work and the average number of hours that mothers and fathers devote to care.

In general, care outcomes - in hours devoted to the task - have risen between 2003 and 2007 and then fallen between 2007 and 2012, except for Spanish fathers who display an evolution in the opposite direction. In comparative terms, Spanish mothers display the strongest results in terms of unpaid work/care which is in line with a more familialistic tradition of the south European care regime. However, the recent rise in care outcomes of Spanish fathers may suggest a change in the division of unpaid work in the household. In the opposite direction, both Portuguese mothers and fathers display the weakest results, below Spanish and EU-15 levels. Yet, it is important to underline that according to previous studies a strong sense of obligation, rather than individual choice, steers Spanish women's attachment to domestic and care work (Guerrero and Naldini 1996). These results reinforce the importance of the inclusion of cultural values in our analysis, which will be performed in chapter VI.

#### **4. Gender and patterns of satisfaction with WFB**

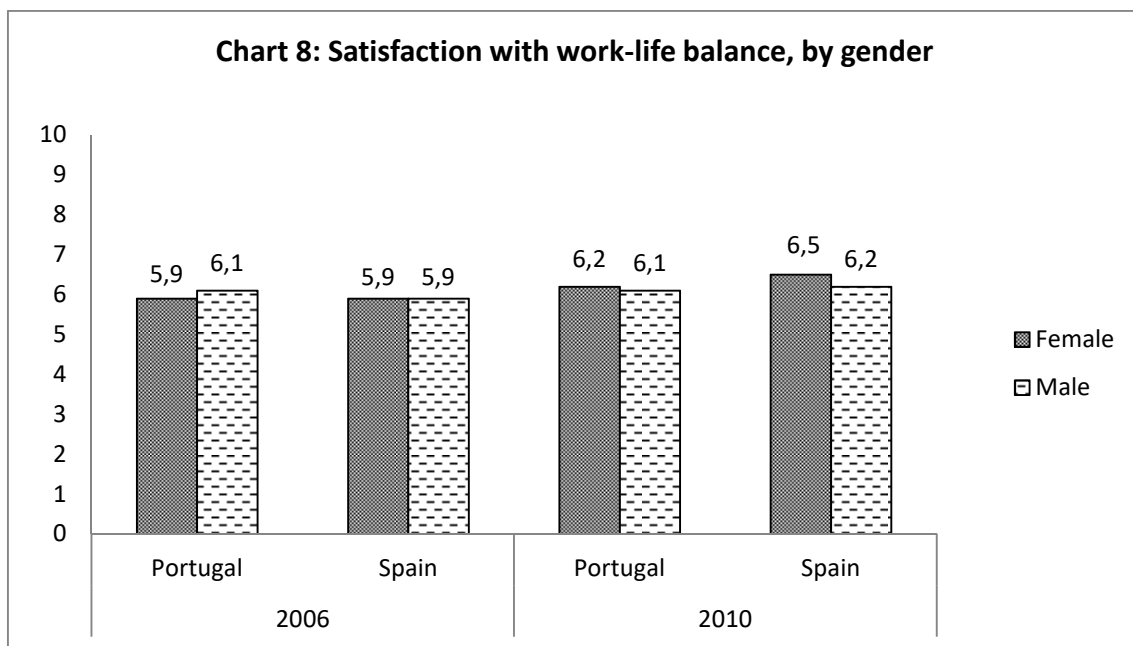
The level of satisfaction with the involvement in work and family roles has been considered by some authors as one of the components of WFB whereby the higher the degree of WFB, the higher the level of satisfaction experienced by an individual, the two being thus directly related (see review in Fahlen 2012, 34). However, it must be highlighted that it measures the respondents' perceptions regarding the degree of balance they have achieved and this is an important limitation of this indicator, due to the phenomenon of "adaptive preferences" (Teschl and Comim 2005). In this sense, by being related to the individual's aspirations or expectations, it is strongly influenced by previous experiences of deprivation or affluence or by those of a reference group (Burchardt 2005). Following Burchardt, the question of adaptation or habituation can be put in the following terms: «...*is it the case that people become accustomed to the situation they find themselves in, and subsequently set their aspirations, form their expectations, and assess their well-being, relative to that situation?*» (2005, 58). Some authors have highlighted this issue in the case of gendered analyses, directing attention to the fact of the adaptation of women's preferences to «*their second-class status*» (Nussbaum 2003, 34). In particular, recent works on WFB using the CA (Hobson 2014, among others) underscore the fact the individual perceptions and expectations are context bound, that is, the role of institutional contexts and gendered norms in shaping one's perceived scope of alternatives regarding WFB. Data interpretation must therefore take this into account and be aware of the fact that satisfaction levels are a personal evaluation of one's balance between work and family life.

Data for the assessment of the subjective level come from two rounds of the *European Social Survey* (ESS3-2006; ESS5-2010), which has been designed to map changes in social values in Europe including, in both these rounds, the satisfaction with the amount of time devoted to work and others facets of life, including the family.

##### **4.1. Changing patterns of satisfaction levels**

The longitudinal analysis of the subjective dimension of WFB is rather limited since there are only two rounds of the ESS that address this questions with a time difference of only 4 years (chart 8). Nevertheless it clearly shows a strong stability of satisfaction levels with WFB in both countries, which are considerably high. The fact

that the surveys have been conducted before and after the rise of the economic crisis is also revealing in itself, as it indicates that satisfaction levels regarding WFB have not been affected by economic recession in the Iberian countries. This is coherent with other studies' results regarding the low impact of macro-economic changes in life satisfaction (as reviewed in Gallie 2013, 243). The fact that only respondents in employment have been considered may indicate that the presence in the labour market is an important factor for the subjective evaluation of an individual's WFB.



Source: own elaboration from European Social Survey, ESS3-2006, ed. 3.5 and ESS5-2010, ed. 3.2..

#### 4.2. Gendered patterns of satisfaction levels

From a gender perspective, the evolution seems to be rather gender blind. On the one hand there is no clear gender gap on satisfaction levels with WFB in either surveys and, on the other hand, both men's and women's degree of satisfaction between 2006 and 2010 show a rise of 0,3-0,6. In this sense, there are no apparent gender differences to report regarding satisfaction with WFB which is a surprising fact, since the data presented in the previous sections clearly indicates that women in both countries are more likely than men to experience difficulties in reconciling their work and family responsibilities. This is even more striking in the Spanish case, where women have been

increasingly more active in the labour market over the last years while still performing a very high share of family care work. Similar surveys (Eurofound and Anderson 2012; Eurofound et al. 2005) which have also addressed WFB issues present similar results, that is, that there is no evident gender difference in the difficulties expressed in reconciling work and family responsibilities.

Hence, following the introductory remarks, one question arises: if distinct workloads in the two countries – both paid and unpaid – do not correspond to distinct WFB satisfaction levels and further, if an increase/decrease of these workloads do not relate to these very same satisfaction levels, is this a case of adaptation, i.e., reduced expectations? Even though this issue is not the main focus of the study, it is expected that the analysis of the capability sets for WFB to be performed in the following chapter can clarify, to some extent, this unexpected homogeneity in satisfaction levels.

## **5. Comparing work-family arrangements in Iberia**

The analysed data suggests that higher employment outcomes are related to lower unpaid work outcomes. Despite a positive evolution of employment rates in both countries both for women and men until 2008, Portugal features consistently higher employment outcomes, especially for women. On the other hand, data for Portuguese women and men reveals a significantly low unpaid workload comparing to Spain and to the EU-15. Hence the question of the double burden seems to be more visible for Spanish women, especially between 2007 and 2012, when high employment rates coincide with a high unpaid workload. One important preliminary result of this study is that concerning the gendered division of paid and unpaid work, the two Iberian countries clearly feature divergent patterns, which raises substantial questions on the validity of the mainstream welfare and care models.

Additionally, in order to determine whether this work-family arrangement corresponds to women's and men's expectations, the variation of the satisfaction levels must be taken into consideration. At this point, an unexpected result occurs: the featured variation of paid and unpaid work patterns does not go along with a similar variation of satisfaction levels, neither diachronically, nor between the two countries, or between men and women. Regardless of the limited existing data in terms of comparison across time, a synchronic analysis clearly shows that both countries present fairly positive

satisfaction levels with the achieved WFB and only a residual gender difference is identified. Could this be a typical case of adaptive preferences?

This chapter has illustrated the evolution of work-family arrangements in Iberia from the early nineties to 2012, which proved to be a period of significant change in this sphere, especially in Spain. From a comparative perspective, it seems to be the case that Spanish and Portuguese parents feature poorer achievements in paid and unpaid work, respectively. Additionally, women in both countries present weaker employment outcomes than their male counterparts, especially in Spain. Nonetheless, working parents in both countries appear to be reasonably satisfied with that situation.

These puzzling results will drive the capability analysis to be performed in the following chapters. As argued, the set of observable achievements presented in the previous sections derive from a broader collection of viable options, the capability set. Yet, can these results be explained by stronger or weaker capabilities for WFB between countries and/or between women and men? As elaborated in the analytical framework, capabilities for WFB are embedded in a universe of opportunities and constraints working at the institutional and cultural levels. Yet, where do specific barriers and incentives lay?

Reconciliation policies are the main instrument whereby states can provide more opportunities for WFB either through parental leave policies, the provision of childcare services or tax incentives to childcare. These policy instruments are directed specifically at working parents and hold the power to open or close different options for work-family arrangements and furthermore to weaken or reinforce existing gender inequalities in this domain. Hence, this study will analyse whether their content can potentially influence the generally high paid work/low unpaid work pattern in Portugal vs. the lower paid work/high unpaid work pattern in Spain. However, institutional obstacles to the conversion of the right to work and to care into capabilities to do so are also related to specific labour market features, as the gender segregation level, the gender pay gap and working times. These characteristics affect women and men differently and may account, in particular, for the divergent patterns of paid work by working mothers and fathers in the two countries. This set of alternatives for WFB made possible by institutional contexts is simultaneously influenced by gender role attitudes to work and family which may rise or lower parent's expectations for WFB and, in the case of more traditional gender role attitudes, may even inhibit some work-

family arrangements. This particular analysis may shed some light upon the results concerning the levels of satisfaction with WFB both cross-country and by gender. Additionally, it is also interesting to consider in what ways these dimensions interplay, namely whether normative preferences are effectively channelled into the political system, shaping reconciliation policy instruments.

## **Chapter IV – Opportunities and Constraints to Work-Family Balance in Iberia: Reconciliation Policies**

### **Introduction**

This is the first of three chapters which investigate institutional and cultural opportunities and constraints in the articulation of work and family responsibilities and highlights the role of the meso and macro-level contexts in the definition of parents' capability sets for WFB. As explored in chapter II, the CA explicitly underlines the role of institutions and policies in facilitating free choice and ensuring that formal rights can be translated into real possibilities. Chapters IV and V will therefore address the main features of reconciliation policies and labour markets and their potentiality to enable free choice in WFB. This entails both the removal of obstacles and positive support for alternative WFB combinations. Chapter VI will then explore the cultural context in which WFB choices are made taking into account that the prevailing gender norms on work and family will influence, on the one hand, women's and men's expectations for WFB and, on the other hand, the policy level. The interaction between the institutional and the cultural levels is, thus, at the centre of this research and provides the background for how WFB decisions are made (table 3).

**Table 3: Institutional and cultural conversion factors for WFB**

<b>Institutional</b>	Reconciliation policies	Parental leave policies
		Childcare services
		Tax-benefit schemes
	Labour markets and job quality	Occupational segregation
		Gender pay gap
		Flexibility of working time
<b>Cultural</b>	Gender norms	Attitudes towards work and family

## 1. Issue History

Despite the important steps taken during the democratization period towards the recognition of gender equality principles, the issue of WFB has been mainly addressed, in legislative terms, through leave and childcare policies. The concept of reconciliation was approached fundamentally as part of the protection of women workers. As explored in chapter III, the backdrop of higher female employment in the Portuguese case resulted in a more significant attention devoted to this issue in the transition decades.

During the nineties, already under the influence of the European debates on reconciliation, «*a considerable constituency was built up (...) to promote reconciliation policy, in particular from the perspective of gender equality, providing support from different sectors of society and practically the whole political spectrum*» (Wall and Escobedo 2011, 213). Starting in 1997, more specifically, important legislation was put forward in both countries. Although equality issues had been a topic of concern for EU member states since the 1970's, it wasn't until the 1990's that measures of reconciliation of paid work and family life were actually developed (Hantrais 2000). EU provisions have been particularly insistent on the development of parental leave schemes and childcare services which represent minimum standards to which member states must comply, irrespective of their national priorities.

In Portugal, the first major developments regarding WFB came about in 1997, when it was enshrined in the Constitution «*That work [should] be organized in keeping with social dignity and in such a way as to provide personal fulfilment and to make it possible to reconcile professional and family life*»<sup>15</sup>. It is particularly important insofar as it identifies reconciliation as an essential part of work with dignity and moreover, recognizes the significance of family life alongside employment. It is also important to reiterate that this constitutional provision, in conjunction with the commitment of the state to ensure gender equality<sup>16</sup> opens up new paths for state intervention in this policy sector. In the case of Spain, the Reconciliation Law<sup>17</sup> was adopted, drawing upon the European Community Directives 96/34/EC on parental leave and 92/85/CEE on maternity protection in the labour market, expanding maternity leave benefits and their

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<sup>15</sup> Article 59, n. 1 b).

<sup>16</sup> Article 9 h).

<sup>17</sup> Law 39/1999.

flexibility. The law received strong criticism from the left political spectrum as it centres the reconciliation debate on motherhood and the rights of working mothers, thus defining reconciliation as a women's issue. Moreover, as it did not address the issue of care services, their opponents deemed it as merely symbolic.

The late nineties were also marked by the approval of Plan for Equal Opportunities in both Portugal and Spain. One of the objectives of the Portuguese Global Plan for Equal Opportunities (1997-1999) concerned directly the reconciliation of private and professional life, but this topic was closely linked to the issues of family protection and demography rather than with gender asymmetries and the gender division of labour. As a result, the measures promoted at this point were directed at facilitating the participation of women in the labour market, by introducing flexible work schedules and creating or expanding care services for dependents. This approach was further developed in the I National Plan for Employment (1998) which, within the objective of reconciliation of work and family life, focused mainly on the provision of care services to low-income families as well as on the promotion of codes of good practices in companies which were underpinned by the principle of WFB as a worker's right and duty (Zartaloudis 2011, 12). The following National Plans for Equality (2003-2006; 2007-2010; 2011-2013), despite maintaining WFB within the main areas of action, would be deeply influenced by the European social investment approach, whereby work-family conflict should be tackled through the support of women as workers, hence focusing on care services and on the organizational culture of companies. Therefore, the gendered nature of social relations and the resulting unbalanced division of paid and unpaid work between women and men remained absent from the political discourse. Some authors identify this point as the main reason for the lack of results of the Plans so far (Monteiro and Portugal 2013, 103). According to Monteiro and Portugal, the National Plans for Equality mirror the predominance of a familialistic interpretation of WFB, whereby the models of economic development and the demographic issue overshadow the problem of the gendered social relations (2013, 104; 108). In fact, the legal initiatives around WFB have mostly followed EC directives and, apart from the discussions on leave policies, have rarely led to general debated involving the civil society (Zartaloudis 2011; Espírito-Santo, Prata, and Fernandes 2007).

In Spain, similar developments took place during this period. The III Plan for Equal Opportunities between Women and Men (1997-2000), formally introduces the concept of reconciliation in the political discourse albeit framed specifically in relation to the economic and employment sector. Thus reconciliation was regarded as one of the main goals of labour policies, namely in what concerned the promotion of female employment (Guillen Rodríguez, Garcia, and Begega 2009, 130). In this context, the conservative party<sup>18</sup> approved in the early 2000's several measures towards family support which encompassed the possibility of combining maternity leave with part-time work along with a 100€ monthly subsidy for working mothers, as compensation for social and labour related costs. A different policy perspective was announced in 2004 by the newly elected PSOE<sup>19</sup> government, declaring gender equality as priority. The Equality Law<sup>20</sup> was indeed a landmark insofar as it promoted women and men's co-responsibility in family obligations, as the introduction of an individual right to paternity leave clearly illustrates. Despite maintaining the focus of reconciliation on female employment, the socialist government's approach was more concerned with gender equality issues, through the introduction of individual paternity benefits and the setting up of a national long-term care system<sup>21</sup>. Still, the period of economic recession that followed was extremely prejudicial to these policy innovations, resulting in a very limited implementation (Guillen Rodríguez, Garcia and Begega 2009). It had, nevertheless, the advantage to bring the issue of reconciliation to public discussion.

## **2. Parental Leave Policy**

Before examining the distribution of maternity, paternity and parental leaves, it is necessary to briefly define them as there is considerable variation in the distinction of different types of leave between countries. The maternity leave is generally available to mothers only and it is intended to protect the health of the mother and the new-born child. Similarly, the paternity leave is available only to fathers, enabling them to spend more time with his partner and the new-born child. The parental leave is usually available both to mothers and fathers, after the end of maternity leave and it can take the form of either an individual right (each parent has an individual entitlement to a specific

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<sup>18</sup> Partido Popular (PP).

<sup>19</sup> Partido Socialista Obrero Español (PSOE).

<sup>20</sup> Organic Law 3/2007.

<sup>21</sup> Personal Autonomy and Dependent Care Law (39/2006).

amount of leave) or a family right (enables parents to share the period of leave as they choose).

This section will analyse leave entitlements in Portugal and Spain using internationally comparable data from the OECD Family Database as well as detailed information from the «*International Review of Leave Policies*» (Moss et al. 2008), national legislation and secondary literature. It starts by providing an historical context and then moves to the analysis of entitlements between the early nineties and 2012.

## 2.1. Issue History

The main developments of the Iberian parental leave systems have occurred after the democratic transition and particularly since the nineties. It is nevertheless useful to analyse their main characteristics against an historical backdrop, underscoring social and political legacies from the authoritarian and transition periods.

As discussed, the Salazar dictatorship embodied a right-wing, Catholic, corporatist tradition which reduced women to the role of wives and mothers subordinated to the male head of family. These principles were translated into the constitutional text and labour law<sup>22</sup>. While being legally responsible for the domestic and care work women were still allowed to perform paid work and, in 1937, the state granted them the right to be dispensed from work for 30 days to recover from childbirth<sup>23</sup>. However, this right was contingent on the employer's permission. Only in 1969, in the late phase of the regime, legislation was passed entitling married women to 60 days of leave from work after childbirth with a replacement of about 50% of their previous earnings and, most importantly, the protection from dismissal during the pregnancy<sup>24</sup>. The Spanish case shares several similarities. During Franco's era formal employment of married women was also discouraged despite informal work being widespread. Therefore leave for working mother was not an issue. Nevertheless, as occurred in Portugal, 12 weeks of maternity leave paid at 75% became available to all employees in 1966, albeit with very low coverage (Valiente 1996).

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<sup>22</sup> See chapters V and VI.

<sup>23</sup> Amendment to the National Statute for Work.

<sup>24</sup> *Lei-quadro do Contrato de Trabalho*.

In turn, the democratic transition period revealed more contrasting paths. As discussed, the Portuguese revolutionary period was marked by the Constitution of 1976 which enshrined a vast set of economic, social and cultural rights and highlighted the principle of equality between men and women. The constitutional text laid the ground for important reforms, the first being the extension of the maternity leave period for 90 days, fully paid<sup>25</sup>. The constitutional revision of 1982 induced further changes in the leave policy which considered the role of the father as important as the one of the mother for the development of the child. In that regard, and in contrast with the authoritarian period, care was no longer considered as an exclusive maternal responsibility. Interestingly enough, in contrast with the south European neighbours and Spain specifically, the Portuguese female employment rate was already very significant in this period which simultaneously influenced and was reinforced by this innovative legislation. As Wall and Escobedo put it, « *From the outset, the first leave scheme set out in the 1980s reflected the notion of a dual breadwinner model based on a symmetrical integration of both sexes into the employment system*» (Wall and Escobedo 2011, 212).

This new paradigm was materialized in the 1984 law of maternity and paternity, a landmark on the Portuguese leave system which was approved with the support of all the political forces in a context of deep reform of the national welfare system. It entitled mothers to 120 days of fully paid leave and reduced work hours during the first year of the child. Most importantly, fathers became entitled to take up paternity leave in substitution of the mother and either parent could be absent from work to take care of the child, in case of illness. These policy developments were crucial for the autonomization of paternal responsibility while simultaneously underlining the importance of work and family reconciliation for both mother and father. The 1984 law was altered several times during the nineties due to the transposition of EU directives, namely the EU Council Directive 92/85/EEC on the protection of pregnant workers<sup>26</sup> and the Parental Leave Directive 96/34/EC<sup>27</sup>. However, it is important to stress the fact that, at this time, the Portuguese law was already more favourable than the European directives, which were regarded as a reinforcement of the national legislation.

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<sup>25</sup> Law-decree n. 112/76, February 7th.

<sup>26</sup> Establishes the minimum of 14 weeks of paid statutory maternity leave for all female workers.

<sup>27</sup> Requires the member states to have statutory provisions guaranteeing parental leave of at least three months per parent.

The increasing involvement of the fathers in the private sphere, namely in care work, was strongly advocated throughout nineties and, to that end, a detailed study was prepared (Perista and Lopes 1999) as well as negotiations with employers and trade unions. The revision of the constitution in 1997 added extra cohesion to the new leave policy proposal, as it opened the door to positive actions concerning the rights and responsibilities of fathers and their family life. As a result, the 1984 law on maternity and paternity was altered one last time in 1999/2000, extending the maternity leave period and bringing in important entitlements, especially for fathers. Three years later, in 2003<sup>28</sup>, all legislation regarding gender equality in the labour market was included in the Labour Code and despite some disagreement among political forces on other issues, the articles on the protection of maternity and paternity were approved unanimously. Important alterations regarding the flexibility of the leave system were introduced at this point and the role of fathers in childrearing was once again reinforced. According to Escobedo and Wall, «*in the last decade the model has evolved towards an 'extensible early return to work'*» (2015, 14), predominantly full-time. It is important to highlight the fact that leave reforms in Portugal have been always endorsed, at their core, by the main political parties. Political consensus has therefore contributed strongly for continuity and coherence in leave policies.

As for Spain, the democratic transition brought about demands regarding formal rights for women in the field of employment, political participation and divorce, among others, leaving behind key issues in the area of motherhood and family, which were then largely perceived as traditional and linked with the authoritarian regime. During the eighties and early nineties parental leave policies remained as low priority in a context of high female unemployment and growth in temporary work. It was only in the context of a reform of labour relations<sup>29</sup> that maternity leave was extended to 14 weeks, with a one hour time reduction for breastfeeding and two days birth leave for fathers. Following EU accession, maternity leave was further extended to 16 weeks in 1989, 4 of which could be transferred to the father and in 1994 leave payment was increased to 100% of the average income. At the time of the transposition of the two European leave directives, the Spanish system, as the Portuguese, had already met these criteria.

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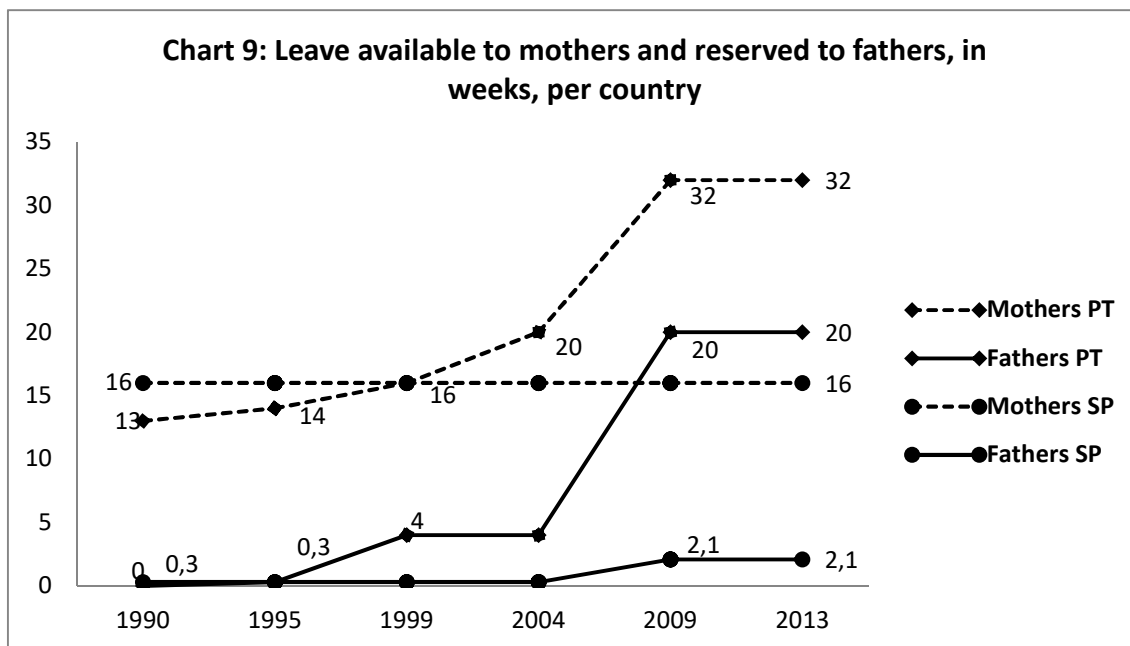
<sup>28</sup> Governing Law of 2004.

<sup>29</sup> Workers' Statute – *Estatuto de los Trabajadores* – 1980.

However, leave policy in Spain held a low priority until the late nineties, when the 1999 Reconciliation Law brought about some flexibilization of the maternity leave allowing for the take up on a part-time basis and an extension of the period transferable to the father up to ten weeks. This reform was approved by the PP and attempted to promote an early return to work of working mothers, even if only on a part-time basis, aiming attention at labour market outcomes. This reform was followed by some regional diversification of leave benefits, whereby some regions started to develop additional entitlements for mothers and fathers. However, it wasn't until 2007, under a socialist government (PSOE), that fathers become entitled to an individual paternity benefit, fully paid. In contrast with the Portuguese case, the two main parties in Spain have developed contrasting leave policy perspectives with the conservatives focusing on flexibility for working mothers and socialists more concerned with equality issues in leave schemes for both parents.

## **2.2. Empirical Analysis**

Chart 9 reports the evolution of paid leave available to mothers and reserved to fathers from the early nineties to 2013, combining maternity or paternity benefits with parental leave entitlements. During the last two decades there has been a steady increase in leave benefits for working parents both in terms of time and money. Nonetheless, the figures must be carefully analysed especially concerning the income replacement rate which may affect significantly the take-up of the leave and therefore the possibilities of the mother or the father to stay home and care for their young children without a steep reduction of the family income.



Source: own elaboration, based on OECD, *Family Database*; Moss et. al, 2008.

Beginning in the nineties, and as Chart 9 represents, considerable alterations have been made to leave policies in Iberia, especially regarding the role of fathers and the sharing of care work. Even though Spain offered a longer period of well-paid leave to mothers in the early nineties, the evolution of leave entitlements was, since then, more limited than in Portugal. Concerning the extension of paid leave available to mothers it remains unchanged throughout the entire period of analysis, at 16 weeks. Nevertheless, in 1994 the replacement rate was raised from 75% to 100% and in 1996 further options were introduced: 10 out of the 16 weeks available could be used while working part-time - thus becoming 20 weeks of leave – or could be transferred to the father – previously only 4/16 were transferable. At this point it is important to underline that the part-time option was only open to the mothers, even if these 10 weeks were transferred to the father. As a result, these flexibility reforms opened different possibilities for choice for mothers and fathers, promoting distinct patterns of labour market participation along gender lines. Moreover, the individual right to care of fathers was only directly addressed by the 2007 reform, which granted Spanish fathers, for the first time, a 2 week fully paid paternity leave.

In Portugal, the 1984 law on maternity and paternity was altered one last time in 1999, bringing in important entitlements, especially for fathers: a fully paid 5-day

paternity leave, 15 days of fully paid parental leave and the right to the 2-hour working time reduction. The following year, the law-decree 230/2000 further extended the maternity leave period to 16 weeks. Thus, while in Spain the 16 week maternity entitlement became available earlier than in Portugal the opposite occurred regarding individual leave rights for the fathers. In fact, the flexibilization of the Portuguese system has clearly prioritized gender sharing while in Spain the focus has been on flexibility for working mothers. Three years later, important alterations regarding the flexibility of the leave system were introduced: for the first time mothers could choose between a period of leave of 16 weeks fully paid or 20 weeks paid at an 80% replacement rate. The 5-day paternity leave became mandatory, reinforcing the focus on the role of fathers in childrearing. More recently, in 2009, the flexibility of the leave schemes has been taken even further. Maternity leave has been transformed in Initial Parental leave, which now reserves 6 mandatory fully paid weeks of leave for the mother followed by 10 fully paid weeks or 14 weeks paid at 80% of previous earnings. This second part of the entitlement falls under the category of parental leave, as it can be used either by the mother or the father, promoting the sharing of the leave between the parents, as it is the rule in Scandinavian leave systems. If parents meet the sharing criteria, whereby fathers must take at least 4 weeks of leave alone (or vice-versa), parents are granted a sharing bonus<sup>30</sup>. In this case, the Initial Parental leave entitles parents to 20 fully paid weeks or 24 weeks paid at 83%. Furthermore, the Father's-only Parental leave now includes the one week of the former paternity leave and the three-week optional father's quota, of which two are mandatory. Additionally, each parent is entitled to an extra period of 12 weeks, though paid at a lower rate (25%)<sup>31</sup>. This latter option is represented in chart 9 which grants mothers a total of 32 and fathers 20 paid weeks of leave composed by a period reserved individually for mothers and fathers, a period which can be equally shared and an additional individual entitlement.

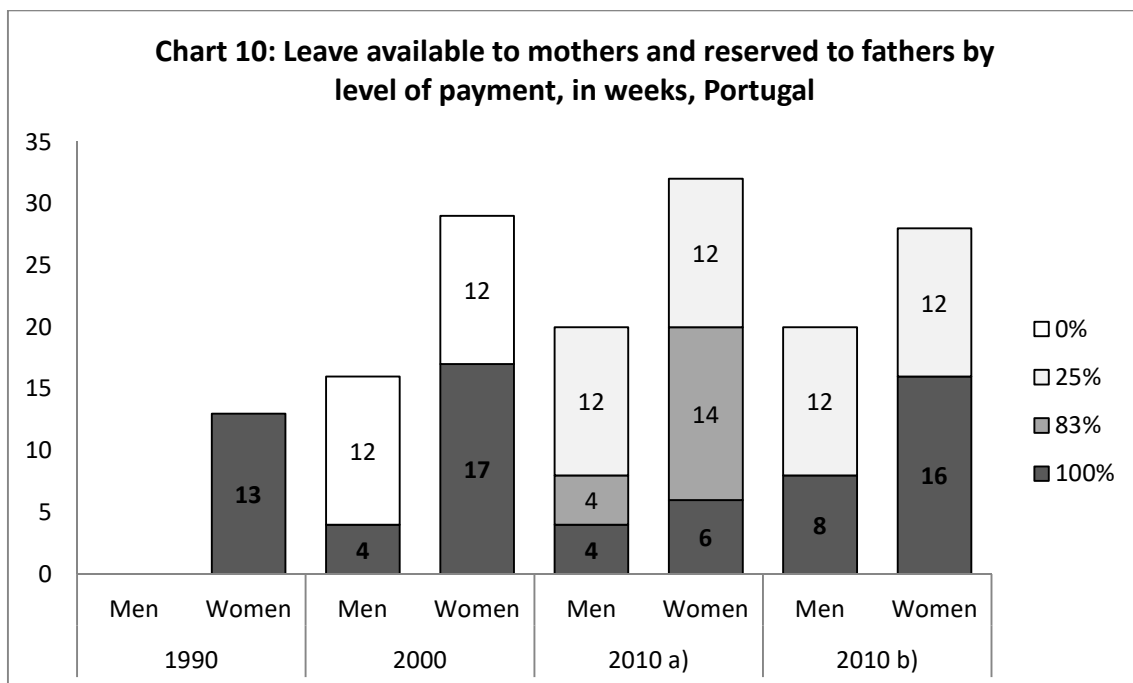
As represented in chart 10 the level of income replacement is as important as the extension of the leave benefit. Given that fathers often have higher wages than their female partners, the loss of income is smallest when it is the mother who takes leave.

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<sup>30</sup> The situation could be reverse, with fathers taking up most of the parental leave available but in the majority of the cases they only take up the period which is specifically reserved to them. Therefore this is the option depicted in chart 10.

<sup>31</sup> Even though parental leave entitlements had been available since the eighties, individualized in the nineties and later with additional part-time options, it was not until the 2009 reform that they included partial earnings replacement. In contrast, in Spain they are totally unpaid, this is the reason why they are not considered in this analysis.

Indeed, the higher the replacement rates of father’s earnings, the higher the probability that they will, in fact, use the leave entitlements. Low replacement rates discourage the use of the benefits and represent a barrier for WFB as the fathers who decide to take them will be financially constrained. Indeed, from the perspective of the fathers, the Portuguese system is significantly more generous as it puts at their disposal 18 weeks of well-paid leave contrasting with the two-week benefit of the Spanish scheme. In fact, the period of the parental leave that can be shared, paid at 83%, could be differently represented in chart 10, allocating 4 weeks of leave to the mother and 14 weeks to the father.



*Note: 2010 a) – with sharing bonus; 2010 b) – no sharing bonus.*

This trend towards greater flexibility but also generosity in terms of time and money of leave benefits increases the range of options available to parents regarding the amount of time they decide to stay at home caring for their children. However, “law in books” or formal rights are only instrumental to the development of capabilities for WFB. Entitlements alone are indeed not enough. As parental leave policy clearly shows, the access to entitlements and the ability to convert these formal rights into real options are just as decisive. Indeed, one important limitation of leave benefits is that they are

restricted to the eligible population which, in turn, depends on individual work conditions and social security contributions. Therefore, the access to entitlements is directly related to each country's labour market institutions. Moreover, even if women and men have access to capability enhancing leave rights, gender role attitudes do interfere on the agency dimension, as the choice of using the entitlements may or may not be culturally acceptable. For this reason, this chapter encompasses the assessment of labour market and cultural factors, following the analysis of two other reconciliation policies: childcare and related tax-benefit schemes.

### **3. Childcare Services**

This section addresses childcare arrangements in Portugal and Spain, using comparative data from the EU-SILC, national legislation and secondary literature. It will firstly examine the origins and expansion of ECEC<sup>32</sup> in both countries as well as its main organizational features and issues concerning quality. Then, it analyses the use of formal childcare services, between 2005 and 2013, per age group, and finally it assesses the results in the perspective of the capabilities for WFB. The question of affordability will also be introduced but will be more thoroughly examined in the following section.

#### **3.1. Issue History**

Both Portugal and Spain feature in the early XXI century a mixed model of provision of childcare services which date back to the XIX century. There is also, in both countries, a significant presence of Catholic organizations in this sector, whose influence pre-dates the democratic transitions. In fact, as of 2013, between 50% and 75% of the service provision for young children belonged to the Third Sector (in Portugal) and to the private for profit sector (in Spain), predominantly run by religious organizations (Ministério do Trabalho e da Solidariedade Social 2013; Ibáñez and León 2014).

Care provision for young children in Portugal has begun, as mentioned, during the monarchy in the XIX century, with some private and charitable institutions providing care services especially to families with financial difficulties. However, it was

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<sup>32</sup> Early Childhood Education and Care, term used by international organisations as the EU and the OECD as a reference to the diverse forms of pre-school provision for young children (0-6 years old).

only after the Republican Revolution of 1910 that this issue gained political relevance with several legislative pieces being introduced, namely concerning early childhood education, support to the children of working mothers and child labour provisions. Despite its political relevance, due to social and political instability as well as budgetary constraints, only 12 institutions were founded during the First Republic and, by 1926, only 1% of children were attending pre-school education (Ministry of Education 2000). In sharp contrast with the Republican principles, ECEC was not a priority for the authoritarian regime led by Salazar, founded in 1926. Public kindergartens were abolished as the responsibility for the welfare of children was primarily attributed to the family, namely mothers. The support of mothers of young children was transferred mainly to Catholic charities (*Misericórdias*) sponsored by the state and, to a smaller degree, the Ministry of Health and Assistance also provided some support to distressed families. The social and demographic changes that occurred during the 60's, most importantly the sharp rise of female employment, led to a reconceptualization of the social protection and education of young children. In this context, day care centres and kindergartens were set up as well as a network of childminders (nannies) in order to support working parents. Two main types of provision had emerged at this point: charities and private for-profit. At the very end of the regime, in 1973, pre-school was reintegrated in the national education system but it was only after the democratic revolution that the Ministry for Education (ME) began setting up a public network of pre-schools. Therefore, the availability of services began increasing while its quality remained as a second-level priority.

In 1986, the Framework Law on the Education System<sup>33</sup> was approved, formally recognizing the pre-school cycle from 3 to 6 years old as part of the education system but not the ECEC services for the younger age group, from birth to 3. Despite significant pressure from state and non-state actors, as of 2017, this distinction remains unchanged. In this context, the Ministry of Labour and Solidarity (MLS) remains the sole responsible for the coordination and funding of the different types of providers for the under 3, public and private, for profit and non-profit as, among others, the National Association of Portuguese Municipalities, the Solidarity Institutions (IPSS), the *Misericórdias* and *Mutualidades*<sup>34</sup>. As for pre-school provision, responsibilities are shared between the MLS and the ME with the first ensuring pedagogic quality and the

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<sup>33</sup> Law 46/86.

<sup>34</sup> According to *Despacho Normativo 75/92*.

latter providing family support in the form of an extended day cover. ECEC provision in Portugal is therefore very diverse both regarding the type of provider and their organizational structure. The mixed model of provision was consolidated in 1983 when the legislation on the statute of private institutions of social solidarity (IPSS) was approved<sup>35</sup> and later in 1992 through a regulatory instrument<sup>36</sup> which specified the relationship between the state and these institutions. In this document the criteria for the determination of the subsidy amounts to be paid by the state to each IPSS were also formalized. It was in fact only in the nineties, under the Socialist government (PS) that a first attempt at coordinating these very diverse ECEC providers occurred whilst expanding the public network<sup>37</sup>. Both the *Program for the Expansion and Development of Pre-school Education* (1996) and the *Framework Law for the Pre-school* (1997) concurred on this goal. One further contribution of the 1997 Law was that, for the first time, pre-school education was conceptualized as part of the basic education. Between 2006 and 2011 the *Enlargement Program for Social Facilities* (PARES) enabled the creation of new childcare facilities, namely for the younger age group. The expansion of ECEC services for very young children has indeed been very slow, not responding to the needs of families, especially in urban areas, where the access to extended families is more limited. Indeed, the distribution of provision remains very unbalanced hence many families in large urban areas (as Lisbon, Porto and Setúbal) have serious difficulties in accessing subsidized institutions and must face the higher fees of private institutions which, in these areas, run from 35% to 45% of the childcare institutions (Ministério do Trabalho e da Solidariedade Social 2013). As a result, parents must resort to a combination of informal arrangements which involve friends, neighbours, in-house help or unlicensed nannies.

Given the diversity of institutions which provide childcare services, their quality varies widely as does the access to high quality services, which still depends on the geographical location and on the socioeconomic status of the family (Ministry of Education 2000, 29). This issue arises especially in facilities for the 0-3 age group, which adding to the scarcity of provision, generally present a lower quality level. Indeed, the quality of services for children under 3 has been under close scrutiny in the

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<sup>35</sup> Law –decree 119/83.

<sup>36</sup> *Despacho Normativo* 75/92.

<sup>37</sup> In addition to this, the Socialist government has also introduced fiscal incentives to firms which financially supported their workers' cost with childcare (Decree-law n<sup>o</sup> 26/99, January 28<sup>th</sup> ).

last decade as, in contrast with most European countries, the state (ME) has no educational role for this age group. Even though the educational aspects of 0-3 ECEC would significantly benefit from the involvement of the ME, the oversight of this population would result in a sudden increase in expense to which the political actors are very reluctant to commit to (Ministry of Education 2000). It follows that financial containment seems to be the main obstacle for both the expansion of services and the improvement in terms of quality. As a result of the financial crisis, the government increased the staff-child ratio, allowing a higher number of children in each room. While expanding the availability of places, both the available space and childminders decreased which clearly impacts on the quality of the services (Batista and Cardoso 2015; Wall 2015).

As for Spain, childcare has always been part of the education system, which has been set up in 1857 and has, from the beginning, secured Catholic Church with a place as *main* provider of primary and secondary education, which would be reinforced during the Franco era. During the authoritarian regime, two types of pre-schools were set up, the maternal schools under 4 y.o. (*escuelas maternas*) and infants schools for 4/5 y.o. (*escuelas de párvulos*). This basic system has only suffered significant alterations with the General Education Act of 1970 whereby public preschool attendance became free of charge and maternal schools were renamed kindergartens (*jardines de infancia*). At this point in time, the country was undergoing a period of economic growth which highlighted the country's need for a reform of the education system, namely at the level of free compulsory schooling (6-13 years old). However, under Franco the use of pre-school services was very limited, as the main providers were private and the fees were considerably high. Most importantly, the strong familialism promoted by the regime reinforced the focus on motherhood as women's social function and thus informal family care was the prevailing care arrangement. In the 60's, enrolment rates of children under 4 were residual and over half the children under 6 did not attend any formal education and care service. In authoritarian Spain the policy focus was therefore on the universalization of compulsory schooling and on the maintenance of mothers as preferential carers of small children.

After the fall of the regime, the need for the expansion of the preschool network was recognized as a means for improving the educational level of the population rather than as a care or family policy reform. This increase in public provision was supported

by all main political parties. As in Portugal, the privileged role of the Catholic Church in the provision of welfare and educational services was maintained after the democratic transition, securing considerable financial support and influence over these sectors. In 1990, a new legal framework for the national education system (LOGSE) was approved which, for the first time, formally integrated preschool education in the education system with a specific pedagogical component. It comprised two cycles: 0 to 3 years old and 3 to 6 years old, the latter being embedded in elementary schools. Whereas a very significant improvement both in coverage and in quality of public preschool services for 3 to 6 year olds took place, the first cycle still suffered from insufficient funding and lack of coordination among government levels. Even though Spain featured close to universal schooling rates for children aged 3-6 in 2008 (95%)<sup>38</sup>, some authors underline the fact that *«preschool works as a functional imperfect equivalent to childcare services»* as opening times do not take into account the issue of WFB (Valiente 2010). In 2002, the PP approved a new organic law for education (LOCE) which redefined the 0-3 preschool cycle as voluntary with an educative-assistance nature which aggravated the insufficiencies in public provision. Despite the clear contrast with the 3-6 enrolment rates, there has also been growth in the use of 0-3 preschool services, amounting to 37% as of 2005.

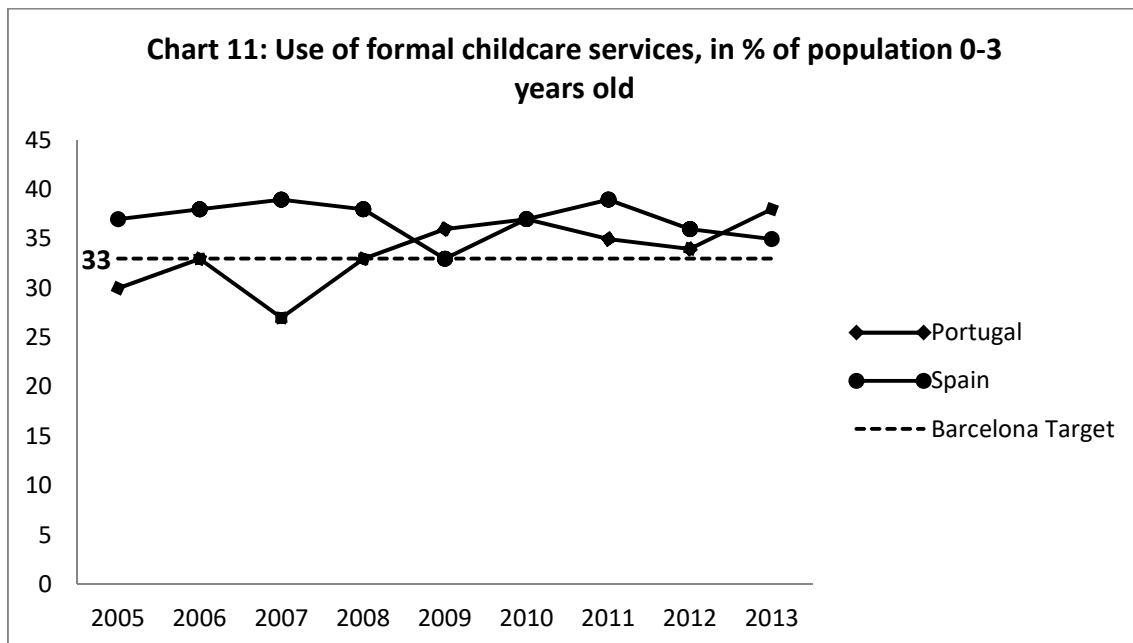
Some studies point out the advance of female employment as one of the drivers behind this evolution (León 2007) and, in fact, the growth of formal care services for small children represents a departure from more traditional male-breadwinner practices that assigned all care work to the mother. Just before the start of the economic crisis, in 2008, a new legal framework for education was approved by the PSOE, restating the importance of service ECEC for children 0-3 as well as its educational character and launching Plan Educa3, a program for the expansion of preschool/0-3 public provision and the improvement of workers qualifications. The program's outcomes were, however, very weak as austerity measures curtailed its implementation (Rodríguez-Cabrero et al. 2015).

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<sup>38</sup> Notwithstanding considerable regional variations (León 2007).

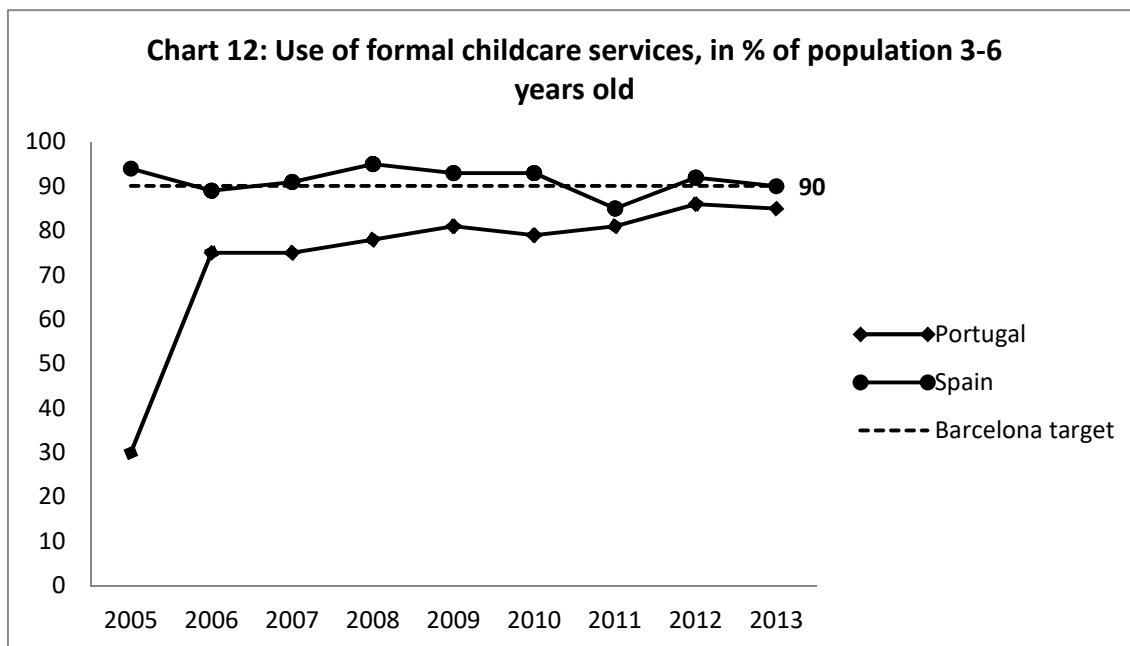
### 3.2. Empirical analysis

The use of formal ECEC services draws on comparative data from the EU-SILC from 2005 to 2013. The enrolment rates of children of both age groups, 0-3 and 3-6, will be analysed with reference to the Barcelona targets<sup>39</sup>, an important monitoring instrument of the provision of childcare services in each member state. Furthermore, this data will be related with the parental leave data examined in the previous section. Indeed, the articulation between leave policy and early childhood education and care (ECEC) entitlements is crucial for WFB capabilities and the gap between the two should be inexistent or as narrow as possible.<sup>40</sup>



<sup>39</sup> The Barcelona Council in 2002 set explicit targets for the provision of childcare places to reach 90% of children between age 3 and mandatory school age and 33% of children under the age of 3 by 2010 in order to remove barriers to women's participation and achieve full employment. These targets were later restated in the 2008-2010 employment policy guidelines (Council Decision 2008/618/EC).

<sup>40</sup> For cross-country information on the relationship between leave and ECEC entitlements, see [http://www.leavenetwork.org/lp\\_and\\_r\\_reports/cross\\_country/](http://www.leavenetwork.org/lp_and_r_reports/cross_country/)



Source: Eurostat / EU-SILC, variable: *[ilc\_caindformal]*.

As charts 11 and 12 show, there is a large variation between enrolment rates of children under three and pre-school children despite the steady growth at both age levels between 2005 and 2013.

Despite the comparatively low use of ECEC services, in 2008 Portugal achieved the Barcelona target for very young children (33%) and by 2013 enrolment rates had increased by 5%, which clearly mirrors the increase in public investment in new childcare facilities. Even though the data presented encompass both part-time and full-time use of care facilities, it is important to underline that 36% out of 38% of Portuguese children under 3 using formal childcare do it on a full-time basis<sup>41</sup>. This is an exceptional case, especially in the SE context, and compares only to very high coverage countries, as Sweden. Again, this highlights the fact that the “extensible early return to full-time work” leave model (Escobedo and Wall 2015) which has been consolidated in Portugal for the last decade demands a fitting ECEC network for very young children, which enhances parents capabilities for WFB.

As for Spain, 0-3 enrolment rates have been consistently higher and above the Barcelona target, except for 2009 and 2013. Taking note of regional discrepancies, Catalonia, the Basque Country and the Autonomous Community of Madrid consistently

<sup>41</sup> 30 hours a week or over.

feature values well above the national average (León 2007). However, when comparing to Portugal, one crucial difference is that while the Portuguese part-time use of formal childcare is close to residual, in Spain it represents over half the cases, following the SE pattern. Thus, despite the higher enrolment rates for children 0-3 in Spain, the intensity of use is in fact lower than in Portugal. One could relate this with the option available to Spanish mothers to use the maternity leave on a part-time basis, however, for this assumption to be true, young children had to be enrolled by the age of 6 weeks, when that leave benefit is available. In fact, they can only be admitted in formal childcare services once they reach 4 months (16 weeks) thus making this type of articulation impossible.

Again, the issue of leave-ECEC articulation comes to the fore, as both Iberian countries feature a pattern of low service coverage and short paid leaves. This is a serious constraint for capabilities for WFB as it leads parents to resort to informal care arrangements or, in the absence of such, to abandon paid work, usually mothers. The option for alternative care arrangements, as domestic workers, is also contingent on the family's income level as it represents a heavy cost for the family's budget.

As regards the Barcelona target for children between the age of three and the mandatory school age (90%), as of 2013 Portugal had still not reached it, featuring a participation rate of 85%, mainly full-time. However, enrolment rates in pre-school have been sharply rising since the early 2000's, supported by the universalization of pre-school education in 2009. In Spain, except for the years 2006 and 2011, enrolment rates have been consistently above the Barcelona target, highlighting the early investment in pre-school services that took place since 1990, with the LOGSE. However, as in the case of the younger children, the use of part time pre-school services in Spain is also very significant in contrast to what occurs in Portugal. The slight decrease in enrolment rates in more recent years in both countries may be attributed to funding cuts or higher unemployment levels that facilitate informal or parental care arrangements, revealing reduced possibilities of Iberian parents to opt for formal and affordable childcare over the last years.

In the context of WFB, as mentioned, it is not enough to assess benefits or services separately, rather the articulation between them. In order that parents are able to choose their preferred work-family arrangements, paid parental leave benefits for both mother and father must be available as accessible and quality formal childcare

services. The gap between the end of the former and the availability of the latter is the main barrier to enhanced capabilities for WFB and can be the source of gender inequalities in paid and unpaid work as it is usually the mother who carries the burden of family responsibilities. As stated, in countries where leave policies promote an early return to work for both parents, it is crucial that ECEC services for both age groups are available, accessible and with quality. At first glance, this appears to be the case of Spain, notwithstanding the lower intensity of use, in number of hours. However, the use of childcare services is not enough to conclude whether the demand for these services is fully met, that is, a lower enrolment rate can be indicative of either low or high formal childcare demand. Indeed, due to limitations of the available data, the figures presented so far do not specify whether parents who resort to informal arrangements, fully or partially, do so because they prefer them or because formal childcare is not accessible.

This is an important issue for the interpretation of Spanish part-time use of ECEC services. In this sense, apart from policy issues, the role of cultural norms cannot be ignored and in most countries attitudes vary according to the age of the child insofar as childcare services are seen as more suitable for older children (Plantenga et al. 2009). Some qualitative works points to the fact that in the case of Portugal, especially for the younger age group, there is a large unmet demand which, as indicated, varies widely from urban to more rural regions. Moreover, the main obstacle to the expansion of childcare seems to be financial containment rather than traditional cultural norms (Plantenga et al. 2009, 41). In the case of Spain, some authors suggest that regarding the youngest children, familialistic practices still persist (Valiente 2009, 2010; León 2007). Indeed, even if maternal employment has risen in the last decades, there is still a large number of grandmothers willing to carry on care tasks. On the other hand, in the case of Spain, specifically, immigrant domestic workers are also available to perform these tasks, even if only for the families who can afford their services.

#### **4. Tax-Benefit Systems**

The affordability of formal childcare that is, how the cost of childcare is shared between public funds and parent or employer contributions, is particularly important for low-income families, as it potentially enhances the capabilities of parents - especially mothers - to participate in paid work. According to EU-LFS data, in 2010, the main reason reported by south European mothers for not working or working part-time was

the high fees of childcare services, with the result that it did not make economic sense to be employed. In this sense, children from low-income families are less likely to participate in formal childcare arrangements than their better-off peers (OECD 2011a, 144). The price of childcare services may, in fact, constrain the WFB options of working parents by limiting their accessibility.

As for the affordability of formal childcare, there are also similarities and differences between the Iberian countries to take note. In Portugal, the costs of childcare services in public or non-profit institutions are income-related or totally subsidized for very low-income families only. Additionally, childcare fees are tax deductible as educational expenses. However, the maximum fees are close to what is charged by private childcare facilities, which is, in general, considered very expensive (Plantenga et al. 2009; Margherita et al. 2009, 66). In Spain, the costs of public ECEC services for children under 3 are divided between the autonomous communities, the local authorities and families, but the amount of public subsidization varies across regions. For pre-school children, attendance is free of charge in public and subsidized private schools. The charges are in turn considerably higher in private institutions in both countries, as they usually do not receive any public funds. In sum, direct public subsidization is not the only instrument countries have regarding the support of childcare costs. Additionally, as examined in the present section, they can reduce or refund childcare charges according to family income, family type and age of children (among other criteria) or even offset market costs of childcare through income tax reductions.

As argued, the cost of childcare can be quite substantial and therefore a strong disincentive to work in many countries. However, when analysing the affordability of formal childcare, it is not enough to consider the out-of-pocket fees paid by parents to the institution as the net childcare costs may be significantly lower once cash benefits and tax concessions are considered<sup>42</sup>. Despite the lack of detailed comparable data, recent OECD tax-benefit models (OECD, n.d.) have incorporated childcare fees as well as childcare related tax and benefit provision<sup>43</sup>. This data will be used, in this section, to

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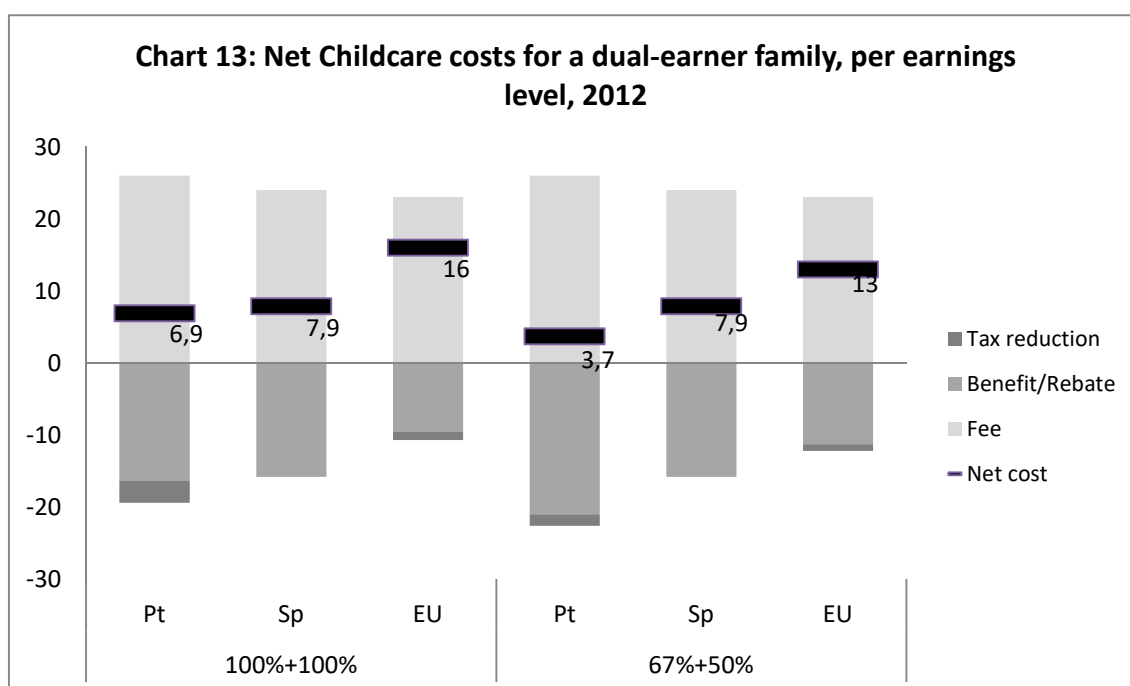
<sup>42</sup> This section only considers benefits which target formal childcare and not the presence of children. This is, as McCaffery (2008) puts it, the «child versus child-care credits» question. It is important to emphasize the role of policy design in this case, as different fiscal mechanisms can potentially support parental home care or formal childcare. This study focuses the latter.

<sup>43</sup> Methodology: The net costs of purchasing childcare (NCC) is quantified by comparing all relevant taxes and benefits between a situation where a family purchases childcare and an otherwise similar situation where no childcare services are bought (e.g. because unpaid informal care is available).

identify potential barriers to WFB capabilities and, in particular, to women’s capability to access paid work as they are, predominantly, the second-earners.

#### 4.1. Empirical analysis

There is a large dispersion of both childcare gross fees and tax incentives given by governments. Looking first at the fees, they are greatly affected by the availability of public facilities and/or the amount of subsidization governments direct to service providers. While in the EU, working parents with the average wage (AW) with two children in full-time care face, in average, gross fees worth 23% of their earnings, in Portugal and Spain they reach over 26% and 24% (chart 13), respectively. As reported, the Portuguese central government and, predominantly, private non-profit childcare providers operate income-dependent fee structures ensuring affordability for poorer families<sup>44</sup>. In the case of Spain, the subsidization comes from the central and regional governments and the municipalities.



Source: OECD Tax-Benefit Models.<sup>45</sup>

Subtracting any tax concessions and benefit amounts from the gross fee charged by the childcare provider gives the net cost to the parents, i.e. the net reduction of family budgets or the “out-of-pocket” expenses resulting from the use of centre-based childcare. Results are for two children, aged two and three (OECD Tax-Benefit Models).

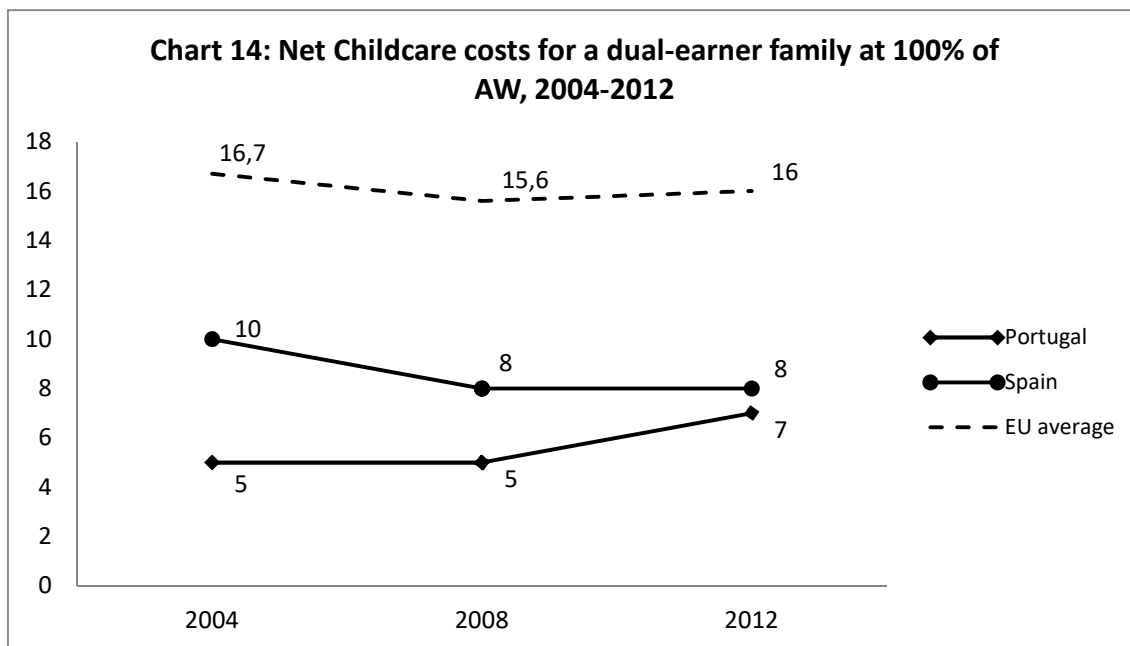
<sup>44</sup> All fee reductions are shown as rebates, according to OECD methodology.

<sup>45</sup> All childcare cost components are shown as percentages of average earnings (AW).

However, lowering costs to match family means does not imply that all demand for formal childcare is met. In fact, affordability is not always followed by availability and, despite reduced fees, many families struggle to find an available place in a childcare institution. It is therefore crucial to interpret this data together with the charts 11 and 12 on «Use of childcare». While low-fee countries aim at providing inexpensive childcare services, most countries adopt demand-side measures, as tax deductions, credits or cash benefits.

Looking at the NCC decomposition in chart 13, it becomes clear that both Portugal and Spain support the purchase of childcare services by channelling resources directly to families through either tax incentives or benefits and rebates, which results in NCC below 7% and 8% of the national average wage, respectively. Looking at low-income families specifically, Portugal presents very low NCC (3,7%), due to the increase in fee rebates. Although neither of the Iberian countries provides cash benefits to parents, the indirect support provided to subsidized childcare institutions is very substantial. In the case of Portugal, adding to this component, childcare fees are tax-deductible thus lowering tax payments for those engaged in paid work. As for Spain, some Autonomous Communities have established tax deductions for childcare fees, but they are not nation-wide and therefore are not represented here. However, tax deductions do not perform well in supporting low-income groups, which are exempt from paying taxes, thus reducing tax progressivity. Looking at chart 13, it is clear that the tax deductions component is lower for Portuguese low-income families. Moreover, for families with limited budgets, tax deductions do not offer an immediate financial relief, as they are only available after the end of the fiscal year.

It is therefore crucial that this type of tax incentive is not the only form of childcare support available but rather part of a more comprehensive package. Indeed, a successful package should ensure that parents may choose their preferred care arrangement with minimal trade-offs between fertility and employment decisions, which is especially important for women's capabilities for WFB (Immervoll and Barber 2005).



Source: OECD Tax-Benefit Models.

In longitudinal terms (chart 14), the data available allows for the analysis of the evolution of NCC from 2004 to 2012. Cutbacks in investment in formal childcare provision have been transversal to all South European countries despite different trends regarding NCC (Jessoula, Pavolini, and Strati 2015; Batista e Cardoso 2015; Rodriguez-Cabrero et al. 2015). While for Portuguese families NCC have risen 2% of AW between 2008 and 2012, in Spain these costs have, in turn, dropped 2% of AW, following the overall European trend of slight descent.

As mentioned above, in the Iberian countries the low availability of childcare services is a greater problem than its affordability, which implies that due to the limited supply of childcare services, the capability of mothers to access paid work is potentially hindered. In these cases, families are forced to resort to private childcare providers which operate considerably higher fees and therefore sacrifice a larger share of the family income.

## 5. Comparing Reconciliation Policies in Iberia

This section has addressed three social policy areas where reconciliation between work and family has been most developed: parental leave, childcare and tax and benefit schemes. It argues that given the multi-level restrictions that act upon WFB, reconciliation policies are a crucial tool in expanding an individual's set of alternatives for reconciling work and family responsibilities. The focus of analysis has been on gender equality taking into account that the traditional division of paid and unpaid work is deeply detrimental to women's participation in the labour market and, moreover, that the recent policy trends tend to emphasize "reconciliation for women", allowing them to shoulder their "double burden", rather than real choice regarding work and care arrangements for both mothers and fathers. As argued, enabling real choice for WFB implies that both sides of the equation must be considered, that is, the valuation of paid and unpaid work, which requires consideration of policy packages that target time and money to work and to care, and the provision of services which enable both.

Although most EU countries, since the late nineties, have adopted some type of reconciliation policies, there are significant differences both in the scope and in the content of these measures. In fact, as Lewis puts it *«even if it is allowed that state intervention in the work and in the family field is desirable (...), it is likely to be difficult to impose a particular model of work-family balance»* (Lewis 2009b, 196). The cross-country differences reflect the historical, social and cultural contexts of the policy-making process and even in groups of countries which share many of these characteristics, namely regarding welfare provision, dissimilarities can be found, as in the case of the Iberian countries. In a context of traditionally deep familialism, low fertility rates and, in the case of Spain, low female employment rates, the Iberia countries have been engaged in the last two decades in developing policies which promote the participation of women in paid work and, to a smaller extent, the distribution of care work between the household and the market and, more importantly, men and women.

**Table 4: Reconciliation Policies in Portugal and Spain**

	Well-Paid Parental Leave (2010)		Availability of Childcare (2013)		Affordability of Childcare (2012)	
	Available to Mothers	Reserved to Fathers	0-3 years old	3-6 years old	100%+100% of AW	67%+50% of AW
<b>Portugal</b>	20	8	38	85	6,9	3,7
<b>Spain</b>	16	2,1	35	90	7,9	7,9

Regarding parental leave, both countries offer care leave entitlements which protect the job held by the mother or father before the birth of the child and guarantee some percentage of income replacement. Since the 2000's important reforms have taken place but, overall, the extension and flexibility of entitlements has been mainly directed at mothers, especially in Spain. It is important to underline that, in the last decade, there has also been an effort to involve fathers in care in both countries, where well-paid leave available ranges from two to eight weeks. However, the gap between the leave period available to mothers and fathers is still very significant, especially in Spain, thus disadvantaging fathers in their capability to engage in care for their children.

From a CA perspective, policy reforms which enhance entitlements flexibility are positive in the sense that they open possibilities of choice, thus taking into account the recipient's agency dimension. The aforementioned leave schemes do in fact offer some options to parents to care for their young children for alternative periods of time, with a financial compensation. However, the opportunities to care are still not similar for both parents, to the disadvantage of fathers. On the other hand, leave policies privilege certain outcomes in terms of labour market participation, as is the case of part-time work for Spanish mothers. Care leave entitlements can in fact improve parents capabilities for WFB but their effect is limited to the eligible population, i.e., they depend on the individual's work condition and amount of social security contributions. In the cases of the Iberian countries, where the informal economy has a considerable weight and patterns of full-time work (particularly for Spanish women) are still irregular, the development of capability-friendly labour market institutions is directly

linked to the potential of leave policies as capability enhancing for WFB. Moreover, leave entitlements as formal rights will not be translated into capabilities for WFB if culturally they are not acceptable, thus conditioning the take-up of these entitlements. Chapter VI will address this issue.

The capability to work and to care also depends on the availability of quality childcare services for very young children since well-paid maternity entitlements start at 16 in Spain and are only as high as 20 weeks in Portugal. Concerning the affordability of childcare services (public or subsidized) both countries direct cash transfers to service providers, thus lowering the costs of childcare. In fact, net childcare costs are overall considerably low, which could be an indicator of high capabilities for WFB for Iberian parents. However, formal childcare coverage, especially for young children (0-3), is very low. After the end of the leave entitlements, women who choose to return to work face the scarcity of public or state subsidized care facilities and those who choose to provide care for their children receive no monetary compensation for doing so.

In this context, although maternity leave entitlements promote an early return to work pattern women find, in fact, their capability for WFB severely hindered, especially in low-income families, who do not have the financial means to resort to private childcare services or domestic workers. Even though childcare policies do not target specifically mothers or fathers, the general assumption is that it is in fact women, usually the second provider, who abandon the labour market. As shown in chapter III, this is not the case of Portugal where partially due to low wages maternal full-time employment rates remain high even in a background of low availability of formal ECEC services for young children. In this context, it becomes clear that the mere provision of affordable, quality services does not automatically enhance capabilities, as mother's agency is still constrained by cultural factors and by labour market structures.

### **Summary**

This chapter has concentrated on the role of reconciliation policies in enabling free choice for WFB, which entails both the removal of obstacles and positive support for alternative work-family combinations. The first section has demonstrated how this issue has been mainly addressed through leave and childcare policies and has been generally identified, in both countries, with maternity protection and the support of

women as full-time workers. Nonetheless, in the late nineties, under the influence of European debates on reconciliation, important legislation was put forward which recognized the significance of family alongside employment and was enshrined in Portuguese Constitutional Law and in the Spanish Reconciliation Law. Furthermore, National Plans for Equal Opportunities have since then included WFB as a goal even though the gender division of labour and the underlying imbalances in unpaid family work have been systematically overshadowed by focus on “reconciliation for women”. This has been especially evident in the Spanish case.

Section two to four perform an empirical analysis of the selected reconciliation policies: parental leaves, childcare services tax-benefit schemes. Section five takes up a capabilities-based comparative view. The empirical sections confirm that policy reforms have indeed privileged the support for women’s “double burden” rather than real choice between work and care for both mothers and fathers. Since the late nineties, extension and flexibility of parental leave benefits have been significant in both countries, even though a greater effort to involve fathers in care is evident in the Portuguese case. Moreover, different leave sharing options are available in Portugal to a much higher degree than in the neighbouring country. Nevertheless, in both countries leave benefits promote and early return to work which calls for accessible childcare services. In this field the differences between the two cases are very narrow, albeit a slight advantage of Spain in children enrolment rates, especially in pre-school. However, the intensity of use is considerably higher in the Portuguese case and the net childcare costs are also more advantageous, especially for low-income families.

In sum, the findings in this section support the argument that the policy environment can play a decisive role in women’s and men’s work-family options by reducing constraints and positively supporting the correction of gender imbalances in the division of paid and unpaid work. Nonetheless, results also suggest that a capability-based analysis of possibilities for WFB calls for the consideration of other institutional factors at the labour market level, above all concerning the social quality of jobs (Drobnič and Guillen 2011). Furthermore, at the macro-level, the prevailing attitudes towards WFB, gender equality and care can act as a strong limitation to the potential work-family alternatives, as even if a particular arrangement is made possible within a particular institutional framework, he or she might feel unable to choose it because it is not culturally acceptable (Hobson 2014). In fact, reconciliation policies are not enough

if the goal is bridging the gap between formal rights and effective possibilities of choice for WFB.

## **Chapter V– Opportunities and Constraints to Work-Family Balance in Iberia: Labour Market and the Quality of Jobs**

### **Introduction**

The aim of this section is to analyse the labour market features that influence women's and men's options for WFB bringing one more time to the fore the issue of time as well as money as crucial elements. To that end, it provides a comparative analysis of the evolution of occupational segregation levels, gender pay gaps and flexibility of working times in Portugal and Spain. As the availability of longitudinal data is limited, the differences between the two countries will be outlined through the legislative measures which have made, since the democratic transition, specific work-family combinations more or less attractive for women and men, thus complementing the statistical data.

The quality of jobs has been part of the European agenda since the early 2000's and the reconciliation of working and non-working life is among its central assessment criteria (European Commission 2001). However, job quality is an unclear concept as each academic field prioritizes different dimensions and thus conceptualizes it in different manners. Notwithstanding, different authors criticize the EC's dimensions (Guillén and Dahl 2009) as it ignores some critical indicators, as wages and benefits. Especially interesting to this research is the work of Green (2013) which also draws on Sen's CA and according to whom high quality jobs generate capabilities that allow workers to achieve well-being and a range of personal goals, as WFB.

The assessment of the selected dimensions is essential for determining to what extent the Iberian labour markets encourage the entry of mothers and fathers and enable them to remain at work. This implies being able to carry out care and domestic tasks while active in employment. Given that this double workload is considerable heavier for women, as explored in chapter III, the quality of the jobs available is even more important to their capabilities for WFB. On the other hand, if gender differences in WFB are to be reduced – or even eliminated-, the quality of male jobs must not be overlooked. The structure of labour markets often reflects social norms and expectations about the gender division of work, assuming that care responsibilities are mostly – if not totally – attributed to the mother. As a result, part-time jobs are usually more available

to women, as the Spanish case clearly shows in chapter III. Having part-time work as an option certainly enhances women's capabilities for WFB but the characteristics of these jobs are equally, if not more, decisive. Research has shown that these part-time jobs exist generally in feminized sectors of the labour market with flexible schedules (employer- rather than employee-driven), poor or inexistent social benefits and low wages, culminating in precarious employment and, necessarily, in weak capabilities for WFB (among others, Casaca 2010; Ferreira 2014; Gálvez, Rodríguez-Modroño, and Addabbo 2013; Rodriguez 2013).

It is therefore crucial to assess simultaneously these three dimensions of job quality – occupational segregation, pay gap and time flexibility – in order to obtain a clearer representation of the labour market context in which mothers and fathers make their options.

## **1. Issue history**

Both the Portuguese and the Spanish Constitutions enshrine the principle of equality of all citizens and forbid all forms of discrimination with regard to sex. Therefore, gender equality constitutes a guiding principle for all legislation and public policy including what concerns the labour market. Nevertheless, only recently has the gender perspective gained some relevance in the employment debate, namely through topics as WFB and the gender pay gap (Espírito-Santo, Prata, and Fernandes 2007, 12).

As this study has repeatedly highlighted, the present context stands in sharp contrast with the reality lived during the authoritarian regimes in both countries when the husband could legally impede the participation of the wife in paid employment<sup>46</sup>. In other words, women were subject to the authorization of their husbands in order to engage in paid work. This was in fact just a reflection of the social and legal hierarchy that prevailed in Iberian societies up until the transition to democracy (Rêgo 2010, 61). In the years after the 1974 Portuguese revolution, the urge for a profound change in both social and legal legacies on matters of gender equality was evident.

During the democratization period both countries were mainly focused on eliminating discriminatory labour legislation while setting up state agencies that would address gender equality issues. In the case of Portugal, the Commission for Equality in

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<sup>46</sup> In Portugal, *Estatuto do Trabalho Nacional* (1933) and in Spain, *Fuero del Trabajo* (1938).

Labour and Employment (CITE) was set up in 1979 as the government structure dedicated to «*de facto equality between men and women regarding all the material conditions that surround the provision of work*» (Rêgo 2010, 64). It was set up as a tripartite mechanism where government representatives, trade unions and employers associations have a seat so as to discuss and guarantee the implementation of legislation on gender equality in labour and employment. However, its role as a privileged venue for social dialogue has faced several difficulties throughout the years as the Portuguese system of labour relations is not based on collective bargaining but steered by legal regulations and government policies (Ferreira and Monteiro 2013, 144). As the next sections will address, this has been a barrier for the implementation of legal regulations on equality in the Portuguese context, as the content of collective agreements is globally very neutral and negotiations are most frequently centred on wage levels and only rarely on issues of gender equality or WFB (Cerdeira 2009).

The first piece of legislation regarding equality in labour and employment was approved in 1979<sup>47</sup> and extended in 1988 and results mainly from the transposition of European directives and applied both to the private and the public sectors. According to some qualitative studies, the greatest difficulties in the promotion of equality during the eighties were not of a legal nature but of implementation as it faced a very low-skilled and low-educated female labour force and rigid and outdated productive structures (Ferreira and Monteiro 2013)<sup>48</sup>. However, as mentioned, it was only after Portugal joined the EU that the policy goals moved beyond laws for anti-discrimination in employment, which were mainly implemented in the public sector (Zartaloudis 2011). In the case of Portugal<sup>49</sup>, specifically, a labour agreement was signed in 1996 between the Socialist government and the trade unions reducing the weekly working time to 40 hours and in the following year the law on equality of treatment of men and women in work and employment<sup>50</sup> was approved, focusing on indirect discrimination at work. Even though this was already included in the 1979 law it further facilitated the filing of complaints against employers for discriminatory practices, namely by trade unions and rather than individual workers. Furthermore, the 2003 labour code was an important

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<sup>47</sup> Law-decree n.392/79, 20<sup>th</sup> September.

<sup>48</sup> Equally important, in the Portuguese case, was the innovative legislation on the protection of maternity and paternity approved during the eighties, which has already been subject to analysis in previous chapters.

<sup>49</sup> For a thorough review of Portuguese legislation on equality in labour and employment, please refer to Rêgo 2010.

<sup>50</sup> Law 105/97.

step forward as it integrated all legislation on gender equality in the labour market as well as the entitlement to compulsory paternity leave and explicitly prohibits gender-based discrimination.

Similarly, Spanish Women's Institute (IM) was funded in 1983 and had a fundamental role in impelling the revision of national discriminatory labour legislation from the Franco as well as in the transposition of directives and treaty provisions concerning equality in the labour market (Campillo Poza et al. 2013, 61; Guillen Rodríguez, Garcia, and Begega 2009). Similarly, since the late nineties, legislative initiatives as the 2001 national action plan for employment (PNAE) have been developed in the framework of the 1997 European Employment Strategy (EES)<sup>51</sup>, aiming at an effective integration of women in the labour market, as participation levels were, at this point, lower than its neighbour's. Nonetheless, the most important legislative piece on this matter is the already mentioned Equality Law of 2007, which has directly tackled the issues of equal pay and equal treatment at work.

As argued, until the nineties public policies and legislative reforms were mainly focused on the prohibition of discrimination in the labour market, thus dismantling the legal framework inherited from the authoritarian regimes. This strategy was part of the global task of adapting national legal frameworks to the EEC and encompassed both the promotion of equal opportunities and equal treatment in work and specific training programs which were set up to adapt the female labour force to a predominantly male labour market. Public agencies for gender equality have had a fundamental role in the implementation of the equal opportunities strategies as well as in the formulation of the national policy plans themselves. Indeed, the National Plans for Equal Opportunities have been especially significant in both countries since the 1995 Beijing Platform for Action<sup>52</sup> and the EES, when gender mainstreaming strategies<sup>53</sup> started to be considered at the planning stage.

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<sup>51</sup> The European Employment Strategy was launched by the European Council at the Luxembourg Jobs Summit in 1997 in the sequence of the Treaty of Amsterdam. Originally, it included the strengthening of equal opportunities between women and men as one of its four main pillars, placing it firmly in the policy agenda.

<sup>52</sup> The Beijing Platform for Action was adopted at the United Nation's 4<sup>th</sup> World Conference on Women, held in Beijing, in 1995. It called upon states, organisations and civil society globally to take action in removing the obstacles to the full participation of women in all spheres of public and private life, namely through strategies of women empowerment and gender mainstreaming.

<sup>53</sup> Gender mainstreaming as a policy approach «...refers to the introduction by governments and EU institutional actors of a gender perspective into all policies and programs, in order not only to analyze

Despite the increase in participation of women in the labour market during the nineties and the 2000's, the quality of female jobs should be a matter of concern as capabilities for WFB are directly affected by the type of jobs available to women. In both countries, recent studies have shown how women have always held the majority of temporary and involuntary part-time contracts with direct consequences on wage levels, penalizations on social benefits and even on the gender division of housework (Casaca 2010; Ortiz Garcia 2014).

The 2008 economic crisis came to worsen this situation, not only due to the already expected socio-economic effects resulting from economic retraction but also on account of legislative measures pursued by governments as part of the respective austerity packages. It has been argued that the specific effects of the crisis on women have become invisible and outside the scope of public debate as the 'crisis discourse' and the uncontested need for extreme measures has become overwhelming (Ferreira 2014; Alcañiz and Monteiro 2016; Rodriguez 2013; Ballester-Pastor 2012).

The rise of unemployment levels is generally the first and more visible effect of economic crises, putting at risk families' economic sustainability and increasing their dependency on social assistance. This case is no exception, but the recession context Europe and especially south European countries have been experiencing has some particular traits, namely concerning its gender effects. During the first years of the crisis, occupational segregation of the labour market has in fact protected women's employment as sectors most severely hit (as manufacturing and the construction sector) were predominantly male. This, accompanied by a sustained rise in women's presence in the labour market, led to an unusual situation where the narrowing of gender gaps in employment rates was favoured by the recession context. This contributed to the invisibility of the effects of the crisis on women and hence the significant constraints to the capabilities of women to work and to care must be highlighted. On the one hand, restrictions on ECEC services supply, as analysed, increase the caretaking burden on mothers who, simultaneously, are forced to find work to replace income loss at home

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*their effects on women and men before decisions are taken, but also to implement, evaluate, and review policies and political processes taking gender into account.»* (Lombardo and Meier 2007, 54). Even though it is part of the Treaty of Amsterdam and of the Constitutional Treaty it has been supported mainly by soft law programs which has led to wide criticism especially from feminist authors who emphasize its very limited implementation and also its use «...an alibi for neutralizing positive action.» (Maria Stratigaki 2005; Walby 2005; Verloo 2005). Other studies point to wide cross country variation at the implementation level pointing to «...a mix of policies, even if it is frequently represented as gender mainstreaming.» (M. Daly 2005, 448).

due to rising male unemployment rates (Gálvez 2013; Gálvez, Rodríguez-Modroño, and Addabbo 2013). This movement into the labour market has been especially visible in Spain. On the other hand, all the austerity packages adopted contemplated adjustments in the public sector, where female employment is mostly concentrated (Bettio et al. 2013).

Since 2010, both countries have approved legislative measures that constrain the capabilities of parents for WFB. In Portugal, workers' mobility was simplified and the daily working time was extended by half an hour. In Spain<sup>54</sup>, workers' rights to a short working day for care reasons as well as breastfeeding rights were limited. Additionally, state incentives to companies when women are reincorporated in their former employment after having been on childcare leave were eliminated (Ballester-Pastor 2012). Gender experts have openly criticized labour market reforms in both countries due to their direct and indirect negative impact on women, labelling it as «*austericidio femenino*» (Gálvez 2013).

Next, the evolution of occupational segregation, gender pay gaps and working time flexibility in Portugal and Spain will be explored.

## **2 Occupational Segregation**

Gender occupational segregation is one type of employment segregation which is basically the gendered division of labour in paid employment and it means that women and men work, to a certain extent, in different occupation, sectors or under different working conditions. It is a form of horizontal segregation and translates the under or overrepresentation of women and men in occupations, using narrower classifications than sector segregation and thus providing more interesting variations.

It plays an important role for WFB analysis as it shapes employment choices for women and men, influencing wage levels and working conditions (Burchell et al. 2014; Bettio et al. 2009; Emerek 2016). Segregation is closely associated with gender inequalities as it reinforces gender stereotypes in the labour market and in the household and facilitates the undervaluation of women's work. Specifically, Burchell (2014, 30) points out five processes that link segregation and gender inequalities: limited visibility of skills in female-dominated jobs; undervaluation of those skills; treatment of women's

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<sup>54</sup> RD 10/2010 and RD 3/2012.

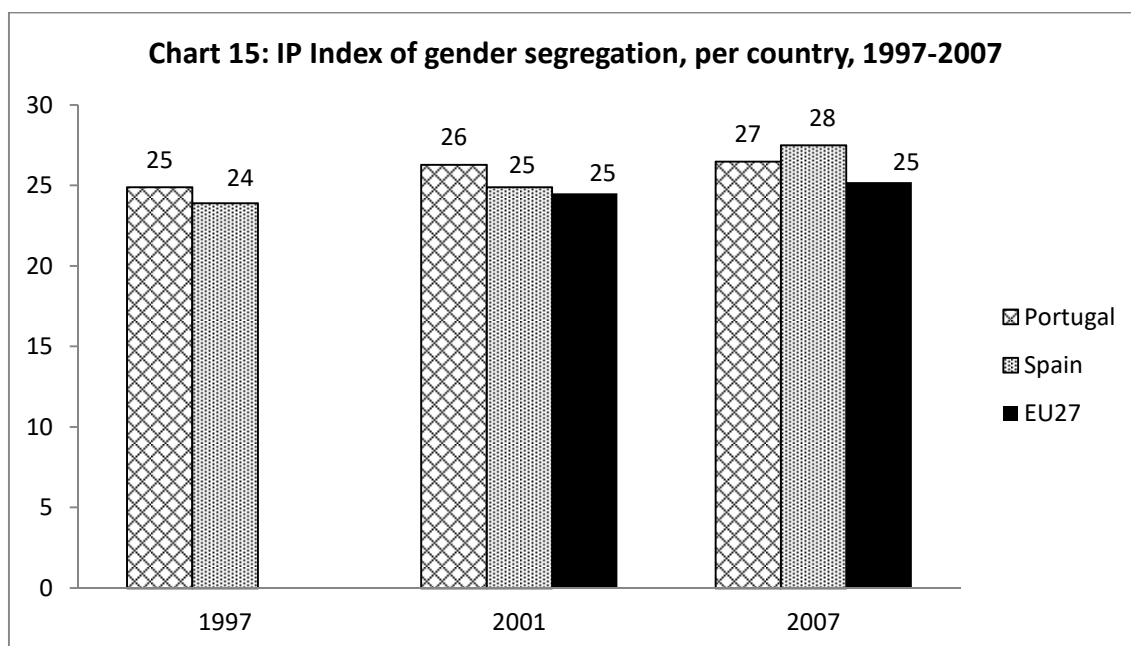
skills as vocation, thus with no significant financial reward; low value-added occupations with high variance in pay levels. The interactions between segregation in employment and in the household are hardly unidirectional. On the one hand, the higher share of care tasks still performed by women perpetuate employment segregation drives women to more flexible jobs both regarding the length of the contract and the duration of working times, which often comes at the cost of job quality, namely regarding wage levels and social benefits. Simultaneously, limited opportunities for high-pay and high-level decision jobs also reinforce the role of men as main provider and thus with a limited role in caring and in domestic tasks. In fact, employment segregation represents a barrier to parents, both women and men, who wish to change the division of labour in the private sphere as it clearly limits the options available in the labour market. It is therefore, a crucial obstacle to WFB capabilities. Notwithstanding, employment segregation is not necessarily associated with disadvantage for women, as it tends to increase with high female employment rates (Bettio et al. 2009; Burchell et al. 2014; Emerek 2016). It must also be highlighted that it can work as a protection mechanism during economic crisis, as public sector jobs are predominantly female, although recent austerity policies have also hit public services.

## **2.1 Empirical analysis**

This analysis will resort to two measures of occupational segregation, the IP index using the ISCO-88 occupational categories generally used in EU comparative studies (Bettio et al. 2009), and a tripartite classification of occupations into feminized, mixed and male-dominated (Burchell et al. 2014). The IP-index translated «*the share of employed population that would need to change occupation in order to bring about an even distribution of men and women among occupations.*» (Bettio et al. 2009, 31), thus the less equal the distribution, the higher the level of segregation. It ranges from 0, in case of complete equality, to 50. In turn, occupations are defined as male-dominated when over 60% of the employees are male, mixed when the proportions of men and women are between 40% and 60%, and female-dominated when over 60% of the employees are female (Burchell et al. 2014, 38).

According to the IP index (chart 15), the levels of occupational segregation in Iberia are very close to the EU-27 average and, as of 2007, in-between the high-segregation eastern countries and the low-segregation Mediterranean countries. Data

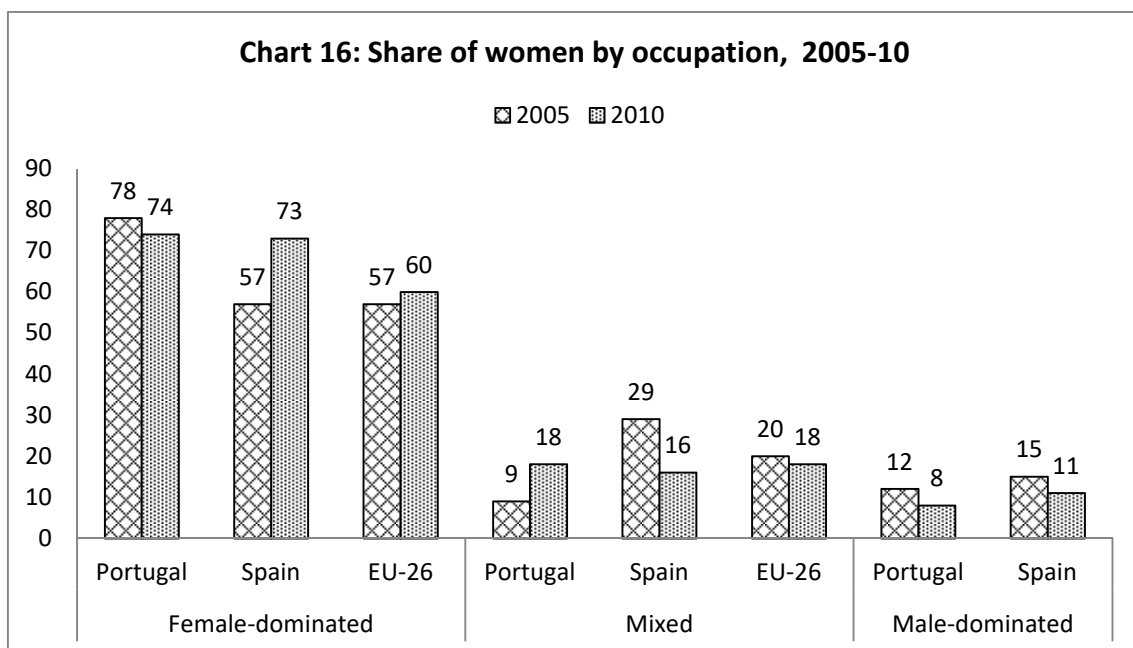
shows that the evolution between 1997 and 2007 has been quite stable except for the increase of 3% registered in Spain from 2001 to 2007. This period of re-segregation means that a slightly larger share of workers need to change occupation in order to achieve a gender balanced labour market. The differences between the two countries are nevertheless not significant, at least as far as the IP index data indicates.

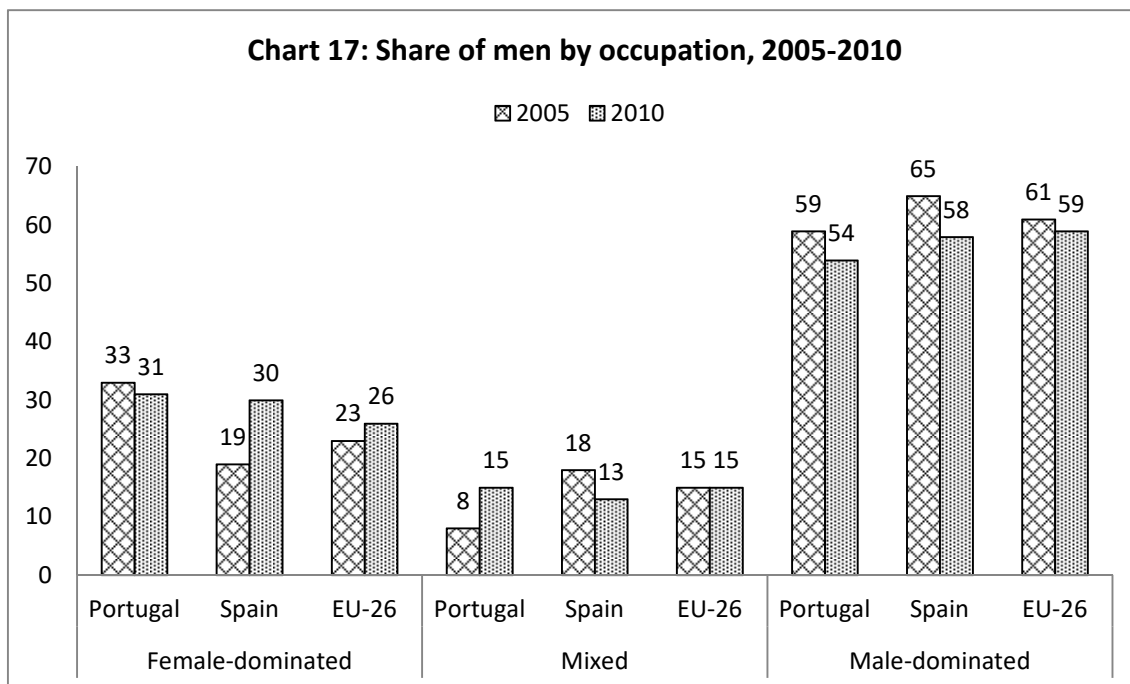


Source: Own elaboration based on Bettio et al. 2009.

Despite its relevance for overall comparative purposes, the index values do not translate the changes in the distribution of women and men by type of occupation, that is, despite the stability of segregation levels, has the distribution of workers by gender remained the same in Portugal? Or, in the case of Spain, what re-distribution movement took place in order to increase segregation levels? Charts 16 and 17 show how women and men moved between occupations in Portugal, Spain and the EU-26 from 2005 to 2010, allowing us to supplement the index data. Generally, the IP-index tends to increase, when the share of workers in mixed occupations decreases, which has been, indeed, the case of Spain. From 2005 to 2010, the share of women and men in mixed occupations decreased as the share women and men in female-dominated increased by 16% and 11%, respectively. The same evolution did not take place in male-dominated occupations, which, during the economic crisis were the ones to lose workers first. This

decrease of workers in male-dominated occupations also occurred in Portugal, at a slightly lower rate, however, it was compensated by an increase of women and men in mixed occupations which contributed to the stabilization of the segregation level of the labour market. Moreover, there was not such a sharp increase of workers in female-dominated occupations as in Spain which also contributed to a more stable index value. In the case of Spain, however, it is important to highlight that the increase of female employment rates may have also contributed to the rise of the IP index due to the concentration of workers in female-dominated occupations.





Source: Own elaboration based on Burchell et al. 2014.

### 3 Gender pay gap

Wages are, as stated, a fundamental part of job quality with consequences during and after the period an individual is employed. Despite the difficulty in measuring the fairness of the wage, the specific case of discrimination on the basis of sex has been broadly addressed as the gender wage differentials in the EU do not show any clear decrease during the last decades (chart 18), to the detriment of women. It therefore represents a clear obstacle to female participation in the labour market, thus, to their capabilities for WFB.

The unadjusted gender pay gap is the measure used in EU reports and despite its limitations it provides a valuable basis for cross-country longitudinal analysis. It is shown as a percentage of men's earnings and represents the difference between the average gross hourly earnings of male and female employees in the private sector, using data from the Structure of Earnings Survey (SES). The target population consists of all paid employees aged 16-64 that are at work at least 15 hours per week. It is referred to as 'unadjusted' as it does not consider the different factors that impact on its evolution, as education and training, work experience, job classification, among others. Some national studies which account for these factors show that both in Portugal and in Spain

pay gaps have been rising when adjusted to the above mentioned factors, that is, discrimination levels have increased (Casaca and Perista 2014; Guner, Kaya, and Sánchez-Marcos 2014). Nonetheless, there is controversy around the methodologies adopted to adjust wage differentials as the factors considered are themselves the result of discriminatory processes. Moreover, there can also be others factors which have not yet been observed and which may be driving these differentials. In this sense, some authors suggest an alternative view, as «*The productivity focus denies a role for social actors in structuring pay within the labour market, including collective actors, such as trade unions and employers' associations, as well as individual employers and individual workers.*» (Rubery, Grimshaw, and Figueiredo 2005, 187).

In any case, independently from the source of data or the type of measure selected, the question remains: why is it that despite all the progress in legal regulations, gender wage gaps are still a problem? Indeed, the principle of equal remuneration for female and male workers was originally included in the Treaty of Rome<sup>55</sup> and thus became necessarily part of the Member-States' legal systems. Concerning the legal visibility of the principle, both Portugal<sup>56</sup> and Spain<sup>57</sup> have included it in constitutional law, amongst other fundamental rights of workers. However, despite legislative developments, the implementation of the principle of equal pay has proved extremely difficult to implement across Europe and other industrialized countries (Ramalho 2004).

There are a vast number of factors that may be at the source of pay gaps, namely, the lower educational and training attainment levels of women, their shorter and more irregular professional careers and job interruptions due to the need to assist family members. However, if these factors are adjusted for, wage differentials still persist and it seems that the most important force driving it is the level of gender segregation, as women still concentrate in low wage occupations. Some authors specifically highlight the persistence of occupational categories which mirror job

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<sup>55</sup> Treaty of Rome, 1957, article 141 (ex 119) on equal pay for equal work.

<sup>56</sup> The Portuguese Constitution adopts the following wording:

Article 59, 1: «*Todos os trabalhadores, sem distinção de idade, sexo, raça, cidadania, território de origem, religião, convicções políticas ou ideológicas, têm direito: a) À retribuição do trabalho, segundo a quantidade, natureza e qualidade, observando-se o princípio de que para trabalho igual, salário igual, de forma a garantir uma existência condigna; ».*

<sup>57</sup> The Spanish Constitution adopts the following wording:

Article 14: «*Los españoles son iguales ante la ley, sin que pueda prevalecer discriminación alguna por razón de nacimiento, raza, sexo...*»

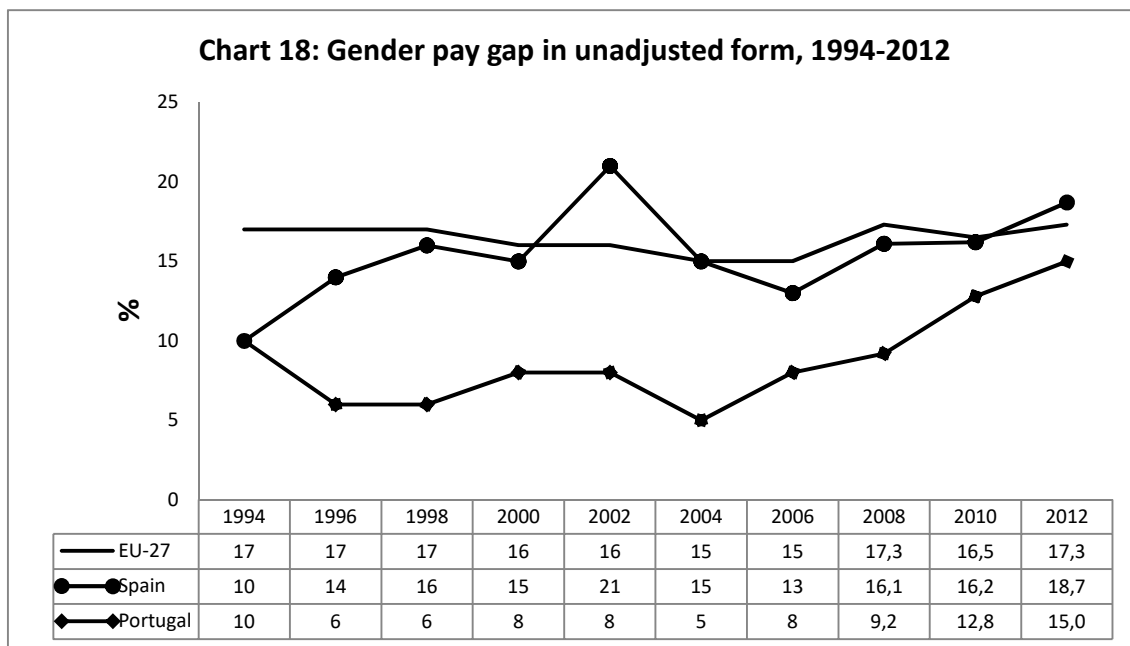
Article 35: «*Todos los españoles tienen el... derecho a una remuneración suficiente para satisfacer sus necesidades y las de su familia, sin qui en ningún caso pueda hacerse discriminación por razón de sexo.*»

valuations and pay calculations based on traditional social stereotypes regarding “male and female jobs” (Ferreira 2010a; Ramalho 2004).

Furthermore, the role of factors as collective bargaining and the potential influence of the social partners are also to be taken into account. Conde-Ruiz refers to several studies that clearly state that *«markets with overall strong collective bargaining frameworks are likely to have small gender wage differentials»* (Conde-Ruiz and Artiñano 2016, 37). Ramalho and Ferreira further develop this idea, arguing that the low visibility of the principle of equal pay in collective bargaining is one of its main weaknesses, as it does not go beyond the mere proclamation of the principle. According to Ramalho, *« (...) in the case of Portugal it is not uncommon for collective bargaining agreements to formally proclaim the principle of equal opportunities and equal treatment for men and women and then immediately establish discriminatory clauses in fields such as the definition of categories, the protection of maternity and paternity , or the definition of criteria governing pay increases, promotions and so on.»* (Ramalho 2004, 55). Similarly, in Spain, weaknesses in the quality of collective regulation among economic sectors are pointed out as an important cause of the pay gaps as negotiated wage increases have been the lowest in sectors with a high female representation (Eurofound 2004).

### **3.1 Empirical analysis**

As Chart 18 shows, pay gap levels in the EU have remained rather stable in the last two decades, around 17%, and this has motivated an array of initiatives at the EU and at the national level in order to raise awareness to this dimension of gender inequality in employment as well as to enshrine the principle of equal pay in national legal frameworks. However, as a multidimensional phenomenon, the gender pay gap is a complex issue to address.



Source: Gender pay gap in unadjusted form<sup>58</sup>, variable [*earn\_gr\_hgpg*] and Gender pay gap in unadjusted form by NACE Rev. 2 activity - structure of earnings survey methodology, variable [*earn\_gr\_gpgr2*].

In general, both Iberian countries have not experienced high pay gaps in the last two decades, by European standards, even though Spain has registered higher values during the entire period of analysis. Even though they have departed from a similar pay gap level, 10% in 1994, the two countries have experienced rather contrasting evolution paths except for the last six years when both have registered a clear increase of pay gap levels. The increase of gender differentials during the period of the economic crisis reflects the increasing flexibilization of wage policies as well as the increase in precarious employment that, as mentioned, affects female workers in particular. Moreover, during the first recessive phase, job destruction was mostly concentrated on construction workers which resulted in an increase of the average educational levels of the men employed and hence of the unadjusted pay gap.

As argued in the previous section, occupational and sector segregation are among the more powerful explaining factors for the pay gap and this argument is not totally contradicted by data on the Iberian countries. Indeed, the levels of occupational segregation are not considerably above EU average, nor are the pay gap levels.

<sup>58</sup> The differences in pay gaps for Spain (2002) and Portugal (2004) are attributed to changes in data sources.

Additionally, the slight increase in segregation levels in 2007 corresponds to an increase in pay gaps in both countries. Although the IP index does not allow for a detailed analysis of segregation movements, it is important to highlight the interdependence of the two dimensions. Indeed, the segregation analysis by type of occupation may prove more useful as it clearly shows, for the Spanish case, an increase of workers, especially female, in feminized occupations which provide, in general, lower wages. This fact, added to the rise in female employment, results in rising levels of gender wage differentials, higher than in the Portuguese case.

However, this does not mean that segregation does not play any role in Portuguese pay gaps, indeed, the female or male-dominated sectors (as services, textile and transports, respectively) are the ones that contribute the most for the gaps in the Portuguese labour market. In contrast, human capital variables, as educational levels, have a smaller relative importance in explaining gender gaps in Portugal as female educational attainments rose significantly during the last decades (Casaca and Perista 2014; P. González, Santos, and Santos 2005).

#### **4 Working Time Flexibility**

Flexibility of the working time is a relevant dimension for the ability to achieve WFB, as it simultaneously influences the possibilities of parents to work and to care. It encompasses diverse arrangements that enable workers to vary their working hours - as staggered working hours, working time banking or flexitime- thus allowing them a less constrained choice over their time arrangements within and outside paid work (Plantenga et al. 2010, 25). Lee and McCann (2006) have explored the concept of working time capability addressing this opportunity that workers may have to choose among a set of feasible combinations of paid working time and other activities. Women's working time capability, in particular, is in general more constrained than men's due to their role as primary carers, which limits their options concerning the time they devote to work. In fact, in the absence of flexible working time arrangements, female workers may be induced to downgrade jobs, that is, to move to a part-time job, often of a lower status, in order to be able to allocate time to care and domestic responsibilities. In the Iberian countries it has not been a relevant issue until recently, by means of the debates around WFB.

In Portugal, in particular, the labour law reform of 2009<sup>59</sup> addressed this issue in detail introducing options as time-banking and flexitime arrangements. Their use has been, however, very limited. Its regulation is usually settled through collective agreements or at the firm level therefore the role of the state is generally more limited than, for example, on the length of working time. Similarly, according to the Spanish legislation, 10% of the annual working time can be distributed irregularly throughout the year and working time flexibility is also regulated preferentially by collective bargaining.

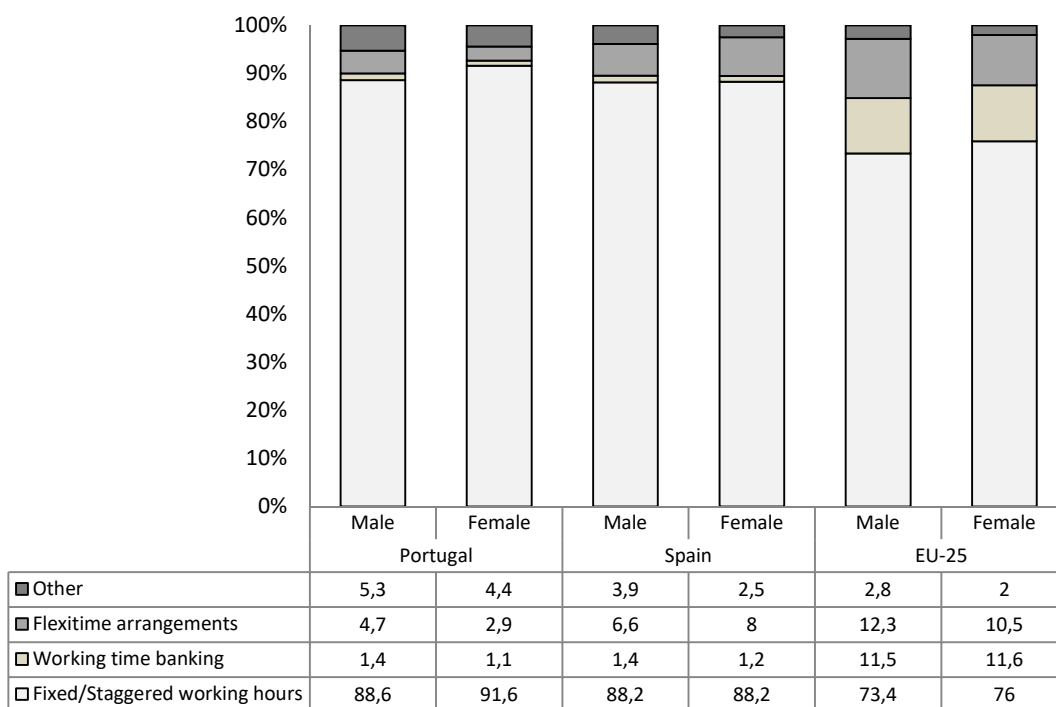
#### **4.1 Empirical analysis**

The data presented in chart 19 indicates that, as of 2004, the large majority of employees in Iberia worked fixed or staggered hours each week, somewhat over the EU-25 average, which is a clear indicator of very narrow working time capabilities for both women and men. Despite staggered hours offer employees the possibility to vary the times for starting and ending work each week, once fixed they remain unchanged and usually workers have little influence upon that decision. Of those workers enjoying some type of flexibility of working times, under 12% in both countries, very few, just above 1%, had the option to bank hours or days of work, which clearly contrasts with the EU-25 average which points to about 12% of employees with the option to make use of working time banking schemes. This is, indeed, the dimension that influences the most the differences in working time arrangements between the Iberian countries and the EU average.

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<sup>59</sup> Law 7/2009, 12th February.

**Chart 19: Working time arrangements for employees aged 25-49, by gender, 2004**



Source: Own elaboration based on Eurostat, EU labour force survey 2004 and LFS ad hoc module 2004 (Plantenga et al. 2010).

Flexitime arrangements, referring to schemes which allow the employees to determine their own schedule or, at least, to decide the time when they start and finish work, are more common than hour banks in Iberia and comparatively more so in Spain than in Portugal. Whereas in Spain 6,6% of male workers and 8% of female workers enjoy flexitime arrangements, in Portugal these values drop to 4,7% and 3%, respectively. It is important to underline that, in contrast to the other schemes, in flexitime there is a gender difference to point out, that is, while in Spain there are 1,4% more women under these schemes in Portugal the relation is contrary to this, with 1,8% more men enjoying flexitime. Interestingly, the share of workers that state to have other type of flexibility – as a fixed start of the day until the work is finished – is relatively high when compared to the EU average, especially in Portugal, where 5,3% of male and 4,4% of female workers. This type of scheme does not enhance working time or, more broadly, WFB capabilities as it does not allow for a synchronization of work and family times. In sum, according to this data, within a scenario of considerably limited

flexibility of the working time, working time capabilities of employees, especially women, are slightly more constrained in Portugal than in Spain.

## 5 Comparing Job Quality in Iberia

This section has shown how labour market features pertaining with the quality of jobs have the potential to influence the capability to work and to care of working parents. On the one hand, the ability of mothers and fathers to choose the amount of time to devote to paid work is constrained by the level of occupational segregation, pay gap and flexibility of working times that coexist in that labour market and that will shape parent's options. In labour markets which feature high levels of segregation by gender, lower wages for women and low flexibility of working times, mother's capabilities to work will be comparatively more constrained than father's due to their role as primary carers and second earners. On the other hand, it is also relevant to highlight that father's capability to care is also limited as male-dominated occupations in particular, do not offer alternative combinations of working times thus holding back fathers from playing a more significant role in family tasks. The traditional division of paid and unpaid work - and the phenomenon of adaptive preferences - is thus perpetuated by lack of feasible alternative WFB combinations.

**Table 5 – Quality of Jobs in Portugal and Spain**

	Occupational Segregation (IP Index, %) (2007)	Gender Pay Gap (%) (2012)	Flexible Working Times (%) (2004)	
			Female	Male
<b>Portugal</b>	27	15	8,4	11,4
<b>Spain</b>	28	18,7	11,8	

According to the analysed data (table 5) there are no substantial differences between the two countries regarding the selected indicators, except for the gender pay gap which is almost 4 p.p. higher in Spain. Regarding changes in occupational

segregation, whereas in Spain the decrease in male-occupations during the crisis corresponded to a greater concentration of workers in female-occupations, in Portugal this phenomenon was accompanied by the concentration of workers in mixed-occupations. This distinct movement was relatively more advantageous for the latter as it contributed to a slightly more balanced distribution of women and men workers among occupations. In contrast, a smaller share of Portuguese workers, especially women, had access to flexible work schedules. While both occupational segregation and differences in income are around EU averages, the Iberian countries feature a considerable lower share of workers with flexible working times, which represents a clear barrier to WFB capabilities.

Reduced working time capability (Lee and McCann 2006) implies that working parents forego the possibility to choose the amount of time their children attend to formal childcare services or are cared for by relatives or domestic workers, thus limiting their own capability to care. In the cases where ECEC services are underdeveloped – as in the Iberian countries - the synchronization of work and family responsibilities may prove impossible, resulting in comparatively lower capabilities for WFB for mothers, whose income is lower and who traditionally take up most care and domestic tasks. It is therefore crucial to consider how the various forms of intervention at the institutional level interact in order to make available to working mothers and fathers the maximum of alternative combinations of work and family time. As explored in chapter IV.3, the Iberian countries feature a low cost/low provision ECEC model, especially for very young children, combined, in the case of Spain, with a low flexibility parental leave model, which still attributes to the mother the main leave benefits and thus encourages the perpetuation of tradition work-family arrangements. Adding to this context, at the labour market level, workers do not find the necessary flexibility in working times which would enhance their WFB capabilities, especially once leave benefits cease.

### **Summary**

This chapter has addressed conversion factors in the labour market sphere and examined how and to what extent they shape women's and men's options to work and care in Portugal and Spain. It has focused on job quality as the amount of time devoted to employment and family is constrained by high occupational segregation levels, wide gender pay gaps and reduced flexibility of working times. These features of the labour

market in addition to a traditional division of labour result in reduced capabilities of mothers to work and of fathers to care due to their primary roles as carers and earners, respectively.

The first section has concentrated on the democratization period as a turning point regarding gender equality in the labour market. Standing in sharp contrast with the authoritarian period, democratic constitutional law in both countries has enshrined the principle of equality between women and men as a guiding principle for legislation and policy reforms of the labour market. This has been extended, in the Portuguese case, to the establishment of a specific governmental structure – CITE - especially dedicated to the promotion legal supervision of regulations on gender equality in employment. Section one has further enhanced that until the nineties policy reforms in both cases were more focused on the dismantling of authoritarian discriminatory policy legacies while adapting national frameworks to the EEC standards. Later in the decade, National Plans for Equal Opportunities started to incorporate gender mainstreaming strategies nonetheless with distinct social backdrops. Whereas the participation of Portuguese women in employment was at that point already very significant, the integration of the Spanish counterparts was still the primary goal of labour policies. Indeed, in the first case, the main challenge was rather the very low skilled and low educated female labour force that resulted in precarious employment and hindered the effective implementation of gender equality strategies. The section ends with some considerations as to the effects on the 2008 economic crisis on labour market policies: in addition to the more obvious effects of the economic recession, as rising unemployment levels, it has also resulted in the adoption of measures on wage flexibilization in both countries and, in the Spanish case, on additional limitations on reconciliation rights. This has been reflected in increasing segregation levels and gender inequalities in pay.

After analysing the evolution of the main policies and legislation on gender and the labour market; sections three to five have examined the evolution of the selected variables concerning job quality: occupational segregation levels, the gender pay gap and working time flexibility. Section six undertakes a capability-based analysis of the main results. It argues that between 1997 and 2007, global levels of occupational segregation remained stable at EU-average levels in both countries, albeit slightly higher values in Spain. The movement of workers underlying this pattern is potentially more prejudicial in the Spanish context as it corresponds to a greater concentration of

workers in female-occupations, frequently more precarious. It has further established that segregation levels are the main driver of the gender pay gap, once adjusted for human capital factors. Likewise, the Spanish context is more detrimental to equal capabilities to work, consistently featuring higher pay gaps than Portugal. In both cases, difficulties in the implementation of the principal of equal pay are emphasized mainly due to its low visibility in collective bargaining. The fact that this is also the main venue for the implementation of flexible working times is also a clear constraint in both cases. Despite its inclusion in legal regulations the share of workers that have access to individual working times is very limited, which represents an additional barrier to their capability to articulate employment and family tasks.

Chapter VI will address the social conversion factors, that is, the prevailing gender norms regarding work-family arrangements that can influence mothers' and fathers' options regarding the amount of time they devote to paid and unpaid work. It will complete the analysis on the barriers to WFB capabilities by showing how gender norms in Portugal and Spain extend or limit mother's and father's possibilities to work and to care.

## **Chapter VI—Opportunities and Constraints to Work-Family Balance in Iberia: Gender Cultures and Gender Attitudes**

### **Introduction**

This study accounts for the importance of reconciliation policies, labour market structures and gender norms in WFB in the Iberian countries. As explored in chapter II, there is a complex interaction among these three elements and hence their influence is more correctly assessed simultaneously, which is the task of chapter VII. Previously, specific features of reconciliation policies and labour markets - as the quality of jobs – in Portugal and Spain have been discussed, illustrating how they enhance or constrain capabilities for WFB. This chapter now turns to the normative dimension, specifically, gender norms, addressing the question whether gender differences in WFB capabilities are related to varying gender norms in both countries.

As chapter III has extensively investigated, there is significant cross-national variation on the gender division of paid and unpaid work that still supports differentiation, that is, gender inequalities in social practices. Several authors argue that in order to understand these patterns it is crucial to add gender norms to the analysis of institutional factors (Lewis 1992; Orloff 1993; Pfau-Effinger 2004) and the following pages are dedicated to that task. Firstly, it concentrates on the development of gender cultures in Iberia in a somewhat extensive manner as values and cultural ideals on gender roles develop and change differently from policies and institutions. The empirical analysis follows, exploring comparative data regarding attitudes about the gender division of labour between 2002 and 2012 and results are discussed.

### **1. Gender cultures in Iberia**

As argued in chapter I, gender cultures refer to the prevailing assumptions on the desirable form of gender relations and of the division of labour between women and men. This section concentrates exactly on that question and how it has been framed in Iberia during the last centuries. Whereas previous chapters have focused the historical context on legacies of the XX century and more specifically, of the authoritarian regimes that ruled during part of the century, it would be misleading to present contemporary gender cultures simply as an opposition to that framework or as a

consequence of it. Indeed, during the XVII and XIX centuries there were major turning points in the construction of normative ideals regarding women and men which have been transported, maintained or modified by the ideas underpinning the XX century's political regimes. Indeed, the dichotomy between female and male roles and the patriarchal concept of family is not a production of the authoritarian regimes. On the contrary, it has been part of the Iberian cultural and social frameworks at least since the XIV century.

As argued by Prieto (2007), gender roles were defined according to the Holy Scriptures of the Catholic Church which establish the "nature" of each sex and, at the same time, their role in social order<sup>60</sup>. Mainly, it conceives marriage as the natural destiny of the woman and, most importantly, an agent of change in her life, whereby she becomes whole. Specifically, it transformed the woman in a totally different being both at the social and economic levels. This is an important principle which has travelled until the XX century. Marriage was effectively the culmination of the natural order of things whereby the man's lineage could be perpetuated and the division of tasks in the household corresponded to the natural inclination of each sex: the man working outside the house as the breadwinner and the main family member and the woman maintaining the household and caring for the children, while being submitted to the husband. The tasks themselves did not hold different value, the dichotomy was in the subjects themselves. In this sense, the division of labour merely mirrored the natural inequalities between women and men in general and in any circumstances, even beyond marriage. In short, the relation of subordination of women to men was a consequence of their different "natural abilities" which legitimized inequalities and represented the fundamental piece of the conceptualization of gender relations in the Old Regime.

The political and cultural discourse of the second half of the XVIII century stands in contrast with that of the Old Regime and as it was centred on the notion of citizenship based on the values of freedom and equality<sup>61</sup>. However, this notion of freedom and equality was not directed at the redefinition of gender roles and the "natural" differences between the sexes remained entrenched in cultural norms. The centrality of the private life became associated with the theoretical and normative

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<sup>60</sup> One of the main literary pieces that emulates this conceptualization of women, men and the family is «La Perfecta Casada», by Luis de León, written in 1583 (Prieto 2007).

<sup>61</sup> In the context of the French Revolution (1789) which was influenced by Enlightenment ideals, particularly the concepts of popular sovereignty and inalienable rights.

framework of the emerging bourgeois society and spread to the popular strata during the XIX century. Not surprisingly, this distinction between the public and the private sphere was underpinned by the notion of differences between the sexes which drove men to the first and women to the latter. In fact, the two spheres were ruled by contrasting principles and legal regulations: «*While the first is understood as the sphere of freedom and equality, the second presupposes a hierarchical relation among its members, be it between men and women, husband and wife, parents and children, among others (...).*»(Vaquinhas 2011b, 13). During the Portuguese I Republic<sup>62</sup> this notion of the patriarchal family remained firmly institutionalized maintaining several norms of the 1867 Civil Code which made legal both the subordination of the wife to the husband<sup>63</sup> and the definition of parental power as the power of the father, simultaneously the head of the family<sup>64</sup> (Vaquinhas 2011a).

As noted, liberal movements were not centred in redefining gender roles but in the consolidation of the “modern citizen”, the bearer of equal civil and political rights and who progressively becomes also identified with the “worker”. The concept of work was indeed theoretically neutral whereby no member of the society should be excluded. However, its political construction as someone who works outside the home, receives a salary and performs this activity on a regular basis, resulted in the inevitable exclusion of women from this category (Prieto 2007). The fact that domestic and care tasks performed in the household were considered as non-productive activities, that is, unpaid activities, reinforced their subalternization and, necessarily, of the women who performed them<sup>65</sup>. It is nonetheless important to recognize the existence of two different patterns of the housewife in the context of the bourgeois society: the middle-class woman who was known as “the lady of the house” and who was responsible for the daily management of the household and the children’s education and, on the other hand, women from popular strata who indeed had to perform all the manual tasks in the household, as cooking and cleaning, among others. Despite these distinctions, they were both however confined to the private realm.

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<sup>62</sup> 1910-1926.

<sup>63</sup> Civil Code 1867, articles 1185º-1187º; 1192º - 1196º.

<sup>64</sup> Articles 138º, 140º, 142º and 143º.

<sup>65</sup> To a degree, one may argue that this is still the case today as the discussion on chapter I regarding the concept of work emphasizes.

In general, until the middle XX century all ideological streams both in Portugal and in Spain recognized the differences between the sexes as legitimizing distinct gender roles and, simultaneously, the gender division of labour. Even minority groups as the socialists or the anarchists, who defended the right of women to paid work, did so within some limitations. On the one hand, domestic and care responsibilities should always be a woman's priority and, on the other hand, their entrance in the labour market could have negative consequences as the lowering of wages and should therefore be avoided (Prieto 2007; Vaquinhas and Guimarães 2011).

As noted in chapter I, throughout the XIX century and the first half of the XX century, the gender division of labour becomes a central element of the bourgeois society's ideology, strongly underpinned by the ideology of domesticity (Williams 1991). The natural inclination of women to their role as wives and mothers justified their limitation to the private and domestic sphere, as the angels of the home. During the XIX century this idealization of the female role was further legitimized by scientific and religious beliefs which may seem apparently contradictory. In fact, while medicine emphasized women's biological predisposition for maternity, the Catholic Church underlined the role of women as the guardians of the religious practice, including the cult of Mary – also emphasizing maternal values (Vaquinhas and Guimarães 2011). As the next section will show, the centrality of maternity as the role of women will remain entrenched in cultural ideals for following century.

The centrality of marriage, as emphasized in the beginning of this section, remained as the cornerstone of a woman's life as it was during the Old Regime. Through marriage, she became the housewife and her dependence was transferred from the father to the husband, whose well-being should be her primary concern. Independently from her social or economic position, marriage entitled her to a degree of social recognition that contrasted with her inferior legal status. In addition to marriage, maternity was the corollary of the female condition and the «*glory of the Christian couple*» (Vaquinhas and Guimarães 2011, 217). Despite the fact that the Portuguese I Republic (1910-1926) was strongly invested in the secularization of society and in the curbing of the influence of Catholic Church, in daily life the norms that regulated gender relations were the ones dictated by the religious tradition, that is, the difference between sexes implied inequality and subordination. In contrast, during the Spanish II Republic (1931-36), equality between sexes was recognised both in family sphere and

work sphere and the right to vote was extended to women. However, this political experience was too short to become entrenched in social norms and values. The defeat of the republicans in the Spanish Civil War (1936-39) sealed the return to the conservative Catholic normative framework that would prevail until the sixties.

In fact, the Franquist regime (1939-75) recovered «*La Perfecta Casada*» as the normative ideal of gender relations and similarly used the differences between women and men to justify inequality and subordination of the first to the latter in the public and private spheres. One of the regime's fundamental laws, the *Fuero del Trabajo* (1938) limited women's right to work outside the home as it corresponded to the «*death of the family home*» (Prieto 2007). Similarly, the Portuguese *Estado Novo* (1933-74), led by Salazar<sup>66</sup>, considered that women's employment represented a serious menace to their mission as housewives and further disaggregated the family home (Aboim 2011, 92–93). For this reason, the *Estatuto do Trabalho Nacional* (1933) also established strong limitations to women's right to work, especially married women, which were dependent on the authorization of the husband. The influence of the Catholic Church and its proximity to the regimes' circles of power – particularly until the Vatican Council II (1961) - further emphasized traditional gender and family values, namely the role of women as mothers. In fact, both regimes glorified women at home and their primary role as mothers, a feature shared with other south European dictatorships in the same period (Bock and Cova 2003).

During the sixties both authoritarian regimes showed some signs of opening to external influences<sup>67</sup>, which was translated in some changes in legal norms, namely concerning the participation of women in the labour market. In both countries women's right to work outside the home, within some occupational limitations, was recognized and in Portugal the husband's consent was not necessary in some pre-defined situations<sup>68</sup>. Nonetheless, in these «*dual societies*» (Sedas Nunes cited in Aboim 2011, 96), strong limitations of women's rights still prevailed. The husband controlled the wife's salary, managed all family's assets and held the parental power; women could not travel outside the country without the husband's consent or even have a driving license; domestic violence was concealed by the regime and simultaneously justified as

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<sup>66</sup> Preceded by military dictatorship between 1926-1933.

<sup>67</sup> Signs of economic growth, tourism and emigration, albeit more significant in Spain.

<sup>68</sup> Spanish *Ley de Derechos Políticos, Profesionales y de Trabajo de la Mujer* (1961); and Portuguese *Código Civil* 1967.

a natural consequence of the family hierarchy (Casimiro 2011), abortion was a crime and divorce was prohibited. There was no room for family planning or birth control methods, which were, likewise, forbidden. Despite some changes in the final years of the Iberian authoritarian regimes, feminist ideologies disseminated in movements as the May of '68 were strongly restrained by the regime's censorship which identified it as a «*new type of terrorism*» (Aboim 2011, 98).

Nonetheless, it is important to underline the fact that no society is normatively homogeneous and this was also the case of Portugal and Spain. There were in fact tensions between the conservative norms and values endorsed by the regimes and pressure for social and political change from certain groups which became more accentuated during the sixties. At that time, in the case of Spain, there were already some movements which endorsed women's issues and challenged the regime's normative framework regarding gender roles. Their political agenda which was naturally centred in the opposition to the regime also included other issues concerning the roles of women in the family and in the labour market and were already organized at the local level. In contrast, in the Portuguese case, most women's groups only appeared after the democratic revolution and any expressions of the feminist ideology were, as noted, strongly repressed by the regime. Until that point in time, their action was extremely incipient and much less politicised than in the neighbouring country.

Despite similarities between women's movements, some authors point out central issues that ultimately differentiate their strategies and agendas and, hence, their role in the shaping of gender cultures during the democratization period. Adding to the weaker organizational structure of the Portuguese movements, the more intense instability and political turmoil of the early transition years resulted in a stronger focus of actions on the consolidation of democracy, on class inequalities and on labour-related issues (Tavares 2008; Prata 2007). Moreover, the fact that Portuguese women were already significantly integrated in the labour market in the seventies and eighties, albeit with precarious work conditions, legitimized the prevalence of the rights of the 'woman-worker' over other types of inequalities. In contrast, the more organized and politicised Spanish movement pushed for more specific agendas despite similar concerns with the rights of the working class. During the early seventies, the movement was already engaging in intense grassroots activities which included, among others, issues on sexuality, discriminatory practices in education, in employment or in the

family across all social strata. According to Prata, «*While in Portugal, democracy was the highest priority to most women's groups, in Spain, only a few organizations supported the idea of a 'waiting game'*», while democracy got reinforced (2007, 72). As a result, «*A new politicized female identity was beginning to emerge in Spain and was grounded on a very different basis from what had been indoctrinated by the fascist regime.*» (2007, 94).

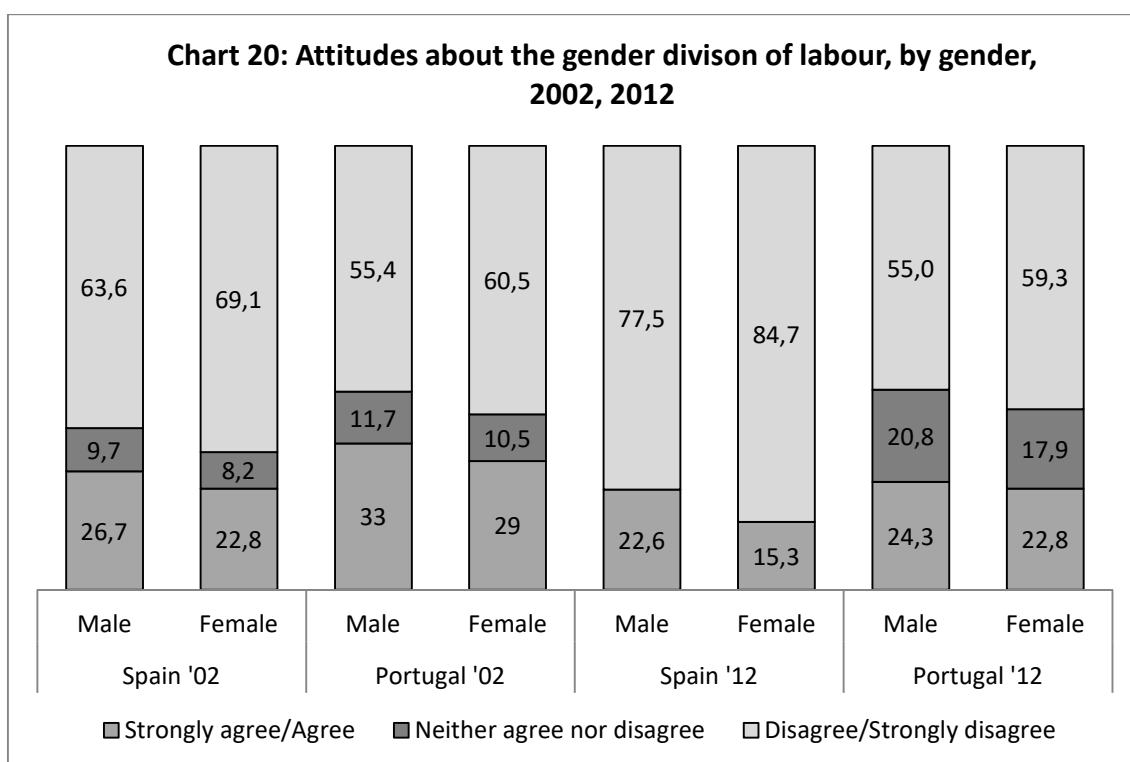
In sum, until the end of the seventies the male breadwinner/female home-carer model was dominant in the Iberian region. The strict separation of gender roles, the cornerstone of this ideal type, dictated accordingly that the public sphere was reserved to men whereas women should remain confined to the private sphere of the home – the gender division of paid and unpaid work was thus materialized. Indeed, the distinction between the male provider and the female carer was a central element of the family ideology that authoritarian regimes in both countries endorsed, as an ideal type of family to aspire to (Aboim 2010b). It is nonetheless important to distinguish cultural and institutional frameworks from social practices. Indeed, a large share of women despite not being formally employed, were regularly engaged in agricultural tasks, an important part of the family economy. This was the only case where the female's cooperation was accepted within a strict cultural model promoted by the state.

The end of the Iberian authoritarian regimes in the mid-seventies brought about critical changes both at the institutional and the normative levels. As explored in previous chapters, the fast modernization process was characterized by the desire of a clear breach with references from the past. The promotion of values of equality, namely gender equality, was materialized in the increasing integration of women in the labour market and the subsequent decline of the male breadwinner model. However, regarding gender cultures and family structures, features of both continuity and change are still relevant in Portugal and in Spain (Guerrero and Naldini 1996; Aboim 2010b). On the one hand, as investigated in chapter III, the traditional gender division of labour has developed into new and diverse forms, generally with both women and men engaged in paid work. Despite the Portuguese case being especially outstanding in this matter, the integration of Spanish women in the labour force during the last decades has also been notable. However, in the sphere of care and domestic work the rupture with traditional gendered practices appears to be slower and more reluctant in both countries.

As the empirical section will further explore, the process of modernization at the normative level may be associated with this resistance to change in the private sphere. Despite the role of men as carers being acknowledged as desirable in both countries there are clear signs that some forms of familialism and maternalism are still relevant in the Iberian gender cultures (Guerrero and Naldini 1996; Aboim 2010b; Torres 2008). As a result, and adding to the slow and limited expansion of childcare services, the male breadwinner model of the authoritarian period has been progressively replaced by a gender cultural model of dual breadwinner with childcare in the extended family (Pfau-Effinger 2012, 538). In the Spanish case, particularly, informal childcare, which was previously the responsibility of the mother, has been increasingly transferred to the older generation of women, mostly grandmothers often living in the household, who take on the task of caring for young children (Flaquer and Escobedo 2012). Nevertheless, the view still persists that it is the role of mothers, and not of formal services, to take care of young children (Valiente 2009). Alternatively, in middle-class households, it is immigrant workers who frequently assume this role. In the case of Portugal, the support of the extended family has been limited in the last decades by the fact that the older generation is still active in the labour force and, additionally, families have often migrated from rural to more urban areas (Torres 2005, 181–83).

## **2 Gender attitudes – empirical analysis**

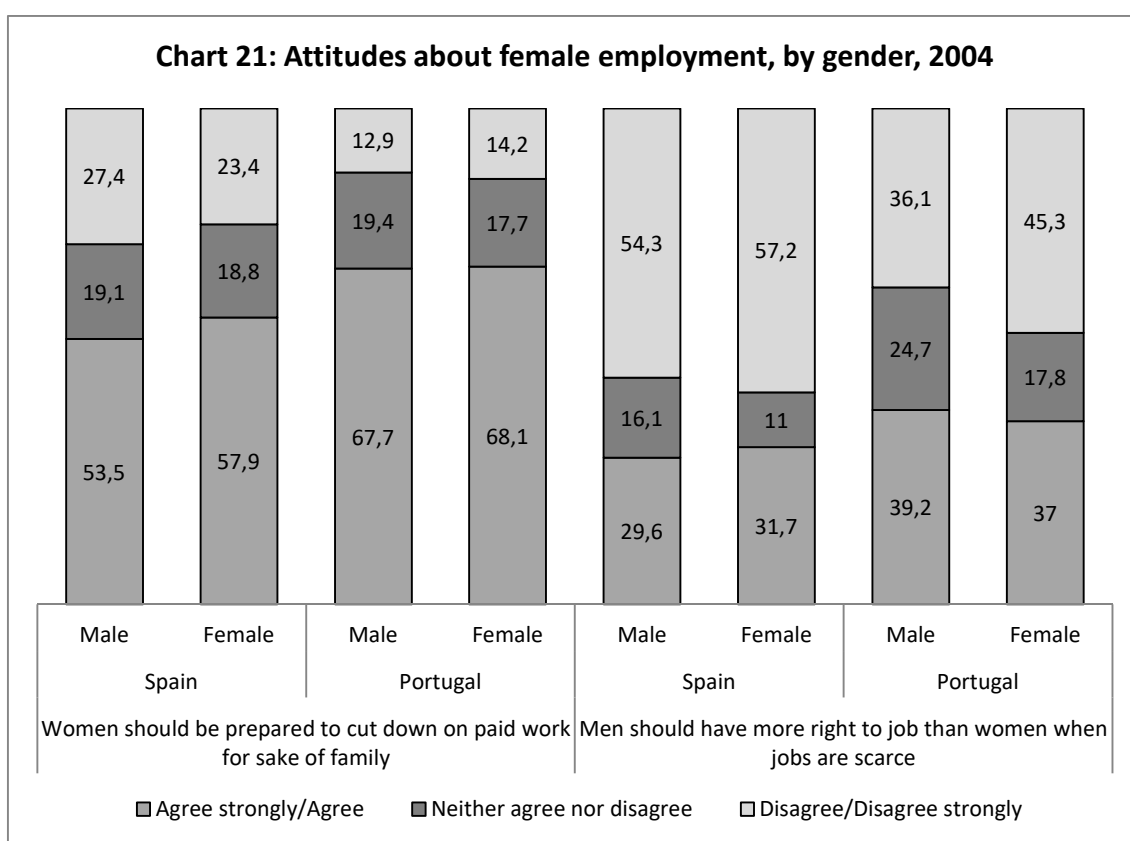
Data for the empirical analysis come from various European surveys that examine a range of issues, among which, the gender division of labour. The first data set is the International Social Survey Programme (ISSP) from 2002 and 2012 and the second data set is the European Social Survey (ESS) from 2004 and 2010. By combining four surveys that cover the timespan of a decade, this analysis seeks to illustrate the evolution of attitudes towards the gender division of labour and, specifically, the level of agreement or rejection of the male breadwinner norm in the two countries. Attitudes about the gender division of labour will be classified along the traditional/modern axis, depending on the level of agreement or rejection of the male breadwinner norm. It follows that the stronger the agreement with statements 1 to 3, the more traditional the attitudes on the gender division of labour. Even though attitudes are not a direct measure of gender cultures they reflect the norms operating across societies and are thus taken as an indicator of the normative dimension.



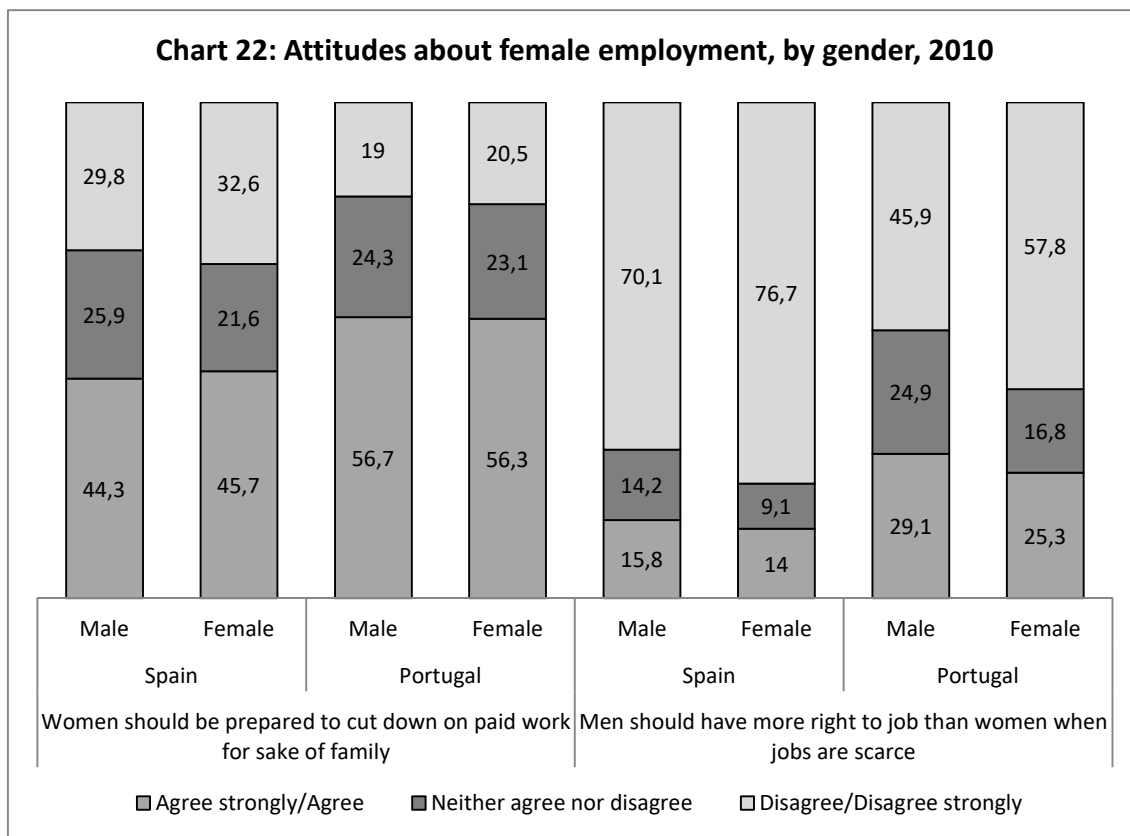
Source: ISSP 2002, 2012.

Globally, the ISSP data (chart 20) shows that, concerning attitudes, Iberian women and men reject the male breadwinner model and that the share of the sample that agrees with statement 1 has decreased between 2002 and 2012. While in 2002 less than one third of the respondents agreed that «A man's job is to earn money; a woman's job is to look after the home and family», in 2012 that number dropped to less than one fourth. However, the driver of this decrease is not, at least in the Portuguese case, a corresponding increase in the share of answers expressing clear disagreement but rather the share of respondents expressing a position of uncertainty towards statement 1. In the case of Spain, similar conclusions cannot be drawn as this intermediate option has not been presented to the respondents in 2012. Nevertheless, it appears to be the case that ISSP Spanish respondents express slightly less conservative attitudes than the Portuguese counterparts. When taking gender into account, female respondents tend to adopt more modern attitudes in both countries and in both ISSP surveys. On average, there is a 6 p.p. difference between the share of women and men who disagrees/strongly disagrees with statement 1, to the advantage of women. This rejection of the traditional

division of labour is further emphasized by particularly modern attitudes regarding the participation of men in caring tasks in both countries, as shown by some authors (Torres 2008; Aboim 2007). Despite the centrality of the family which is common to the European context, attitudes on the roles of women and men in the family structure convey more egalitarian views as opposed to the prevailing gender norms in the previous decades (Torres et al. 2012). The analysis of ESS statements 2 and 3 convey a clearer picture of the respondents' attitudes towards the role of women in the labour market specifically in relation to men and the family.



Source: European Social Survey, 2004.



Source: European Social Survey, 2010.

ESS data from 2004 and 2010, as depicted in charts 21 and 22, illustrate the fact that Iberian women and men do not approve the idea that men should have an advantage in relation to women concerning the access to the labour market, which reveals a fairly strong support for the principle of gender equality in paid work. The level of rejection of statement 3 increases significantly between the two waves in both countries and hits the very significant level of 77% of female respondents in Spain in 2010. Indeed, all traits of traditionalism tend to disappear when women's right to paid work. In both ESS surveys, between 17% and 25% of Portuguese respondents express a more ambiguous position, selecting the «neither agree nor disagree» option towards statement 3. As noted before, Spanish respondents, women in particular, tend to express slightly more modern attitudes, here clearly illustrated by the difference of 20 to 25 p.p. in rejection levels of statement 3. This general opposition to the male advantage in the labour market is accompanied by a high value attributed to paid work which, in the Portuguese case, especially emphasizes financial compensations, that is, salaries. The generally low wage levels and limited family budgets certainly contribute to this valuation although

other non-material and emancipatory components of paid work are also valued, pointing to the modernization of gender cultures (Torres 2005, 146–48).

In contrast, data on statement 2 provides very divergent information regarding attitudes on the gender division of labour. When confronted with the possibility of sacrifice of female employment for the sake of the family, the majority of respondents express a clear position of agreement. This reflects a more conservative attitude with little gender differences. It follows that, despite the fact that the majority of respondents strongly reject the sacrifice of women's paid work in favour of men this is not the case when the wellbeing of the family is put at stake. In this particular situation the role of women as primary carers comes to the forefront revealing some ambiguity on the attitudes of Iberian women and men. These results are not, however, surprising, as they point to the familialistic and maternalist traits of Iberian societies which, especially in the Portuguese case, still hold some influence on attitudes about the gender division of labour. Other authors have also identified this ambivalence in the Portuguese case (Wall 2007; Aboim 2007; Torres 2005). On the one hand, the male breadwinner ideal is clearly rejected, hence respondents recognize and support women's right to paid work and men's role as carers. On the other hand, this pattern returns to more traditional values when the well-being of the family, and especially of the child, is emphasized. In this case, the centrality of motherhood comes to the fore revealing a clear tension between women's role as full-time workers and as carers. As Aboim puts it, «*a cultural embeddedness of gendered ideals of the family*» seems to prevail (2010a, 183) as «*the affirmation of the participation of men in the domestic sphere does not eliminate the normative dilemma the women face.*» (2007, 46).

In sum, and despite these tensions revealed by the ESS data, there has been a clear trend towards more modern attitudes between 2002 and 2012 which is clearly documented by the four surveys. Portuguese respondents express more traditional positions than their Spanish counterparts, especially regarding the family's well-being, and in both countries men adopt slightly more conservative views than women.

### **3. Comparing gender attitudes in Iberia**

The attitudinal patterns identified in Iberian countries clearly illustrate the main characteristics of gender cultures referred at the beginning of this chapter. Although gender cultures in both countries have developed from a male breadwinner to a dual earner model since the democratic transition, it does not follow that there is normative homogeneity, that is, that there are no variations within this trend. In the case of Portugal, specifically, there is a particular mix of values that fluctuates between modern gender equalitarian and more traditional maternity-centred ideals; hence transformations at the normative level may occur at different speeds depending on the dimension under scrutiny. Although the determinants of attitudinal patterns are not the object of this analysis, both historical legacies and human capital factors seem to be at the heart of variations between Portugal and Spain. Both educational levels and religious practices seem to influence significantly social representations of gender and of the family. In this sense, the higher educational attainment in the Spanish context may contribute to a stronger attachment to modern values on female autonomy and emancipation. In fact, some authors suggest that, in the Portuguese case, modern attitudes on the gender division of labour is not so much associated with values of individualization and the ideal of the “woman-citizen” but rather with the goal of sharing the breadwinner function (Aboim 2007).

While both countries underwent very fast modernization processes, which may account for normative contradictions and even tensions between norms and practices, the Portuguese democratization highlighted the role of paid work as the basis of gender equality and female independence. To a degree, this may have limited the gender equality agenda to labour-related issues and conditioned broader social discussions around gender ideologies, as occurred in Spain. As Wall (2007) rightly argues, despite the fact that both countries have been significantly influenced by egalitarian perspectives on the division of labour disseminated in Europe throughout the second half of the XX century, they have been reinterpreted and adapted to the national circumstances according to their specific economic and political contexts and moreover to their ideological and normative legacies.

## Summary

Cultural conversion factors were the central subject of analysis in chapter VI adding to the institutional dimension previously analysed in chapters IV and V. It has concentrated on the evolution of gender cultures in the selected cases and on the empirical analysis of gender attitudes towards the division of labour. It demonstrates that, despite the modernization of family and gender values mostly during the last decades, tensions and even contradictions with social practices, state norms and even other conversion factors have always been present.

Whereas contemporary gender cultures tend to be analysed in opposition to those typical of the Iberian authoritarian regimes, this chapter demonstrates the extent to which they have indeed deeper roots. Between the thirties and the seventies both Salazar's and Franco's regimes have in fact materialized very conservative principles on gender relations in legal regulation and in state policies which has resulted in very significant restrictions to women's freedoms, namely concerning paid work. However, the assumptions which underpinned this rigid normative framework go back several centuries and have since then been in strong proximity with religious tradition, namely of the Catholic Church. Differences between the sexes were the result of "natural condition" and hence legitimized inequalities and the inferior status of women. As a result, the woman was always subject to a male figure, the father or the brother and later, the husband. Marriage was therefore considered the central event in a woman's life and maternity its corollary. These principles remained generally unchanged during the XVIII and the XIX centuries when the dichotomy between men's identity as paid worker and women's dedication to unproductive tasks was further deepened. Despite the rise of political ideologies based on principles of freedom and equality, the separation of the public and private spheres further legitimized distinct gender roles in the division of labour and the subalternization of women.

Nonetheless, the first section also underlines the fact that despite the prevalence of these conservative assumptions on gender roles, there has never been normative homogeneity and this fact has become more evident during the sixties, when the pressure for political, social and cultural change gained impetus. It argues that, while some progressive Catholic groups and urban, educated elites challenged the Portuguese *Estado Novo's* views on gender relations, the more organized Spanish women's movements focused specifically on the opposition to the regime's limitations on

women's rights and disseminated, from early on, a broad discourse on gender equality. During the transition to democracy these differences were accentuated as in the Portuguese case the struggle for women's rights were centred on worker's rights given the already high involvement of women in paid work. The fast modernization processes that occurred during the seventies and eighties fuelled the transition from a male breadwinner/female carer to a dual earner model of division of labour. This redefinition of gender roles has been nonetheless more evident in the integration of women in the public sphere than in the participation of men in the private realm.

Section two departs from this historical background and integrates these prevailing traits of familialism and maternalism in the empirical analysis of gender attitudes. It demonstrates that, in spite of the general rejection of the male breadwinner/female carer model in both countries, some normative dilemmas persist, especially in the Portuguese case. In both countries, respondents manifest strong support for more egalitarian views on gender roles and advocate for a greater participation of men in domestic and care tasks. Likewise, the role of women as paid worker is seen as a vehicle for emancipation and economic autonomy. However, some tensions arise between women's role as full-time workers and as primary carers, revealing the centrality of maternity and of children is still very present in gender norms, and comparatively more so in Portugal. From a capabilities perspective, gender cultural models in Iberia and especially in Portugal are likely to enhance agency freedom for employment but not so much for care tasks.

To what extent are these findings coherent with the patterns of reconciliation policies and labour market features previously discussed? Moreover, how do the institutional and cultural conversion versions influence capabilities for WFB? The following chapter will address these questions in an attempt to determine the full range of possibilities open for mothers and fathers in the articulation of work and care tasks.

## **Chapter VII - Work-Family Balance in Iberia: walking the fine line between Functionings and Capabilities**

### **Introduction**

Adopting the CA as the basis of the analytical framework implies that the evaluative space for well-being and quality of life is the space of capabilities and not of resources or utility. As extensively argued throughout this study, any endeavour to adopt the CA must stress the role of agency and the person's freedom to choose from alternative livings, in this particular case, from different strategies of work-family articulation, with the aim of achieving situations or activities which one considers valuable. When performing comparative research at the country level, the assessment of viable work-family combinations must be made from the collection and analysis of data regarding the circumstances which potentially facilitate or constrain them, namely at the institutional and the cultural levels. That was the task of chapters IV, V and VI.

The present chapter represents a fundamental step of the study in which capabilities for WFB will be derived, in other words, it will determine the scope of the possible alternative livings, the full range of opportunities open to women and men in the selected cases. Next, it ties imbalances in work-family arrangements to capability sets with the aim of determining whether they can anticipate patterns of gender inequalities.

### **1. The evolution of capabilities in Portugal and Spain**

In order to assess capabilities, the interplay among institutional and cultural conversion factors must take centre stage, as it provides the background for how WFB decisions are made. This section is structured in chronological order which reflects the main periods of advance, stagnation or decline of capabilities for WFB.

#### **1.1. The nineties**

According to the available data, opportunities to combine work and family were very scarce in both countries in the early nineties as WFB was not part of the political discourse until later in that decade. Until then, this issue was mainly addressed by

removing legislative barriers to female employment – a legacy from the authoritarian regimes –and through maternity protection. In fact, in the early nineties, maternity leave was the main policy instrument which facilitated some kind of articulation between work and family by enabling the provision of informal care to the new-born while replacing the mother's income and securing the return to the previously held job. At this point in time, the main difference between the Portuguese and the Spanish context was that the latter offered three more weeks of paid maternity leave than the first, albeit at a replacement rate 25% lower. Capability sets for WFB were very limited in both countries for both women and men, albeit in contrasting dimensions. The opportunity to stay home and care for the new-born, with income replacement, was in this period restricted to the mother, thus inhibiting fathers from exercising their right to care.

In the case of working mothers, once the already limited maternity benefits ended (at 13 or 16 weeks) the options available became further reduced as early childhood care services were very scarce in both countries despite expansion and regulation attempts in both countries during this period. As a result, mothers who wished to return to their jobs faced a very limited public network of formal care services and those who wished to remain as informal carers faced the absence of financial compensation.

Both mothers and fathers who remained in employment did not have access to flexible working schedules, which further limited their ability to synchronize work and family times. In fact, despite the elimination of gender discriminatory labour legislation during the nineties, women's agency freedom to combine work and care was curtailed by segregated labour markets and wage inequalities in relation to men. Both these features were crucial in moulding women's expectations regarding their participation in paid work and simultaneously the feasible work-family combinations. To sum up, it can be argued that the options for WFB made available by institutional and cultural factors were extremely limited in both countries and hence real choice was virtually inexistent.

## **1.2. The early 2000's**

During the following decade the articulation of work and family gained relevance in the political discourse and action, even though this was underpinned by a logic of "reconciliation for women" with the aim of fostering or consolidating female

employment. In fact, the turn of the century brought about considerable improvements regarding the options available in both countries, underpinned by some central policy changes.

Parental leave policy underwent significant changes in the direction of flexibilization and addressing the role of fathers in family life, with particular emphasis in the Portuguese case. As of 2003, mothers were granted a 16-20 week well paid leave - at different replacement rates – and fathers had access to a 4-week fully paid leave. Despite the extension of the benefits for fathers the gender discrepancy remained significant and their capabilities were further influenced by prevailing traits of maternalism in gender norms which ultimately weakened fathers' sense of entitlement to that individual benefit. As mentioned, policy articulation is central for the enhancement of capabilities as the case of parental leave and formal care services rightly exemplify. After the use of the period of well-paid leave, parents, at this point in time, still did not have at their disposal an accessible network of formal care services for the 0-3 age group. In fact, as of 2005, under one third of children under three years old were enrolled in formal care services, public and private, which clearly illustrates a pattern of low service coverage that, in turn, seriously curtails capabilities for work and family articulation once paid leave ceases. Availability of childcare, rather than affordability was the main barrier to WFB in this period, forcing parents to resort to informal care solutions if they wished to return to the labour market. In sum, the lack of policy articulation severely hindered parents' options to combine work and family life. Nevertheless, it is important to underline the fact that during this period fathers' capabilities have been acknowledged, namely through their individual right to care.

In Spain, the early 2000's was a period of some policy advances in this field as well, even if more limited when compared to Portugal. As for the flexibilization of the leave system for mothers it entailed that a part of this benefit could be used in combination with part-time work which represented a new opportunity for women who wished to return to work after the first six weeks of leave. However, no other policy measure was adopted regarding the care of new-borns which, in practice, means that part-time leave would only be a viable option for those who could resort to informal carers. Furthermore, unlike Portugal, Spain registered in this period rising levels of gender wage differentials, a trend which, as previously argued, did not enhance women's sense of entitlement to combine work and care. Ultimately, labour markets

which predominantly offer women lower quality jobs also play a role in the perpetuation of a traditional gender division of labour.

Fathers' options to care were addressed by allowing for the transfer of ten weeks of the maternity leave. This was not, however, an individual right of the father and thus it implied that the mother had to forego part of her right to care. The enhancement of fathers' options was thus achieved by means of the constraint of those of the mothers'. As a result, the options made available by leave policy reforms in Spain, albeit important, were still narrower than in Portugal and closer to a male breadwinner pattern. After the end of the paid leave period, the issue of availability of formal childcare for the younger children remained. Despite a slightly higher enrolment rate of young children, the intensity of use of formal care services – in number of hours – by Spanish children was much lower than in Portugal, which entails an evident barrier to work and family articulation for dual-earner families.

This difficulty was not alleviated in either case by more favourable systems in terms of working times, despite the introduction of some policy measures regarding flexibilization during this period. In any case, it is important to underline that in both countries, so that capabilities for WFB could be significantly enhanced, flexible work schedules should exist in combination with an accessible network of care services for very young children, which is globally not the case. The re-arrangement of working times so as to synchronize them with formal care could be an option for Spanish parents with pre-school children which, as of 2005, already registered an enrolment rate of 94%. According to the analysed data, attitudes on the gender division of labour were already less conservative in Spain than in Portugal, even though, as shown, this fact was not mirrored in the options made available at the institutional level. In other words, there was no cohesion between the different conversion factors in place.

### **1.3. The crises context**

As argued, the exercise of formal rights made possible at the institutional level can be significantly limited by cultural norms, especially when there is a tension or contradiction between these two levels. As of 2012, some policy innovations in both countries encouraged more gender neutral systems which enhanced parents' capabilities for articulating work and care tasks. This evolution occurred against a backdrop of

modernization of gender cultures despite the persistence of some traits of familialism and maternalism. In this regard, as in 2004, Spain featured comparatively more modern attitudes on the division of paid and unpaid work which suggests that the realization of formal rights would be more facilitated than in the Portuguese context. From a gendered comparative lens, men featured the more traditional attitudes in both countries which clearly points to a cultural inhibitor of their sense of entitlement to work-family benefits. Taking this factors into consideration, to what extent have capabilities for WFB been enhanced during the final period of analysis?

As in the previous periods, leave systems remained the cornerstone of work-family policies in Iberia, continuing the trend towards more flexible and generous benefits as well as the focus on encouraging fathers' involvement in care. These features are especially evident in the Portuguese case which based its reforms around the notions of flexibility and gender sharing thus expanding the options of working parents regarding the division of care work and reducing the gap between mothers' and fathers' entitlements. In Spain, policy innovations have been considerable more limited, as leave benefits remained mainly directed at mothers with the acknowledgement of fathers' individual right to care by introducing a two-week full paid paternity leave. In short, time to care with a financial compensation has become more generous to both parents in Portugal while in Spain state-level leave benefits still remained at a considerably lower rate. Furthermore, a possible tension between the policy dimension and attitudinal patterns can be pointed out, as more capability-enhancing policy reforms do not coincide with the more modern attitudes towards the gender division of labour, which can result, as mentioned, in a low sense of entitlement to leave benefits specifically in the case of Portuguese fathers.

Again, in this period, the lack of articulation between leave and childcare policy remained untackled. Before the start of the 2008 economic crisis, both countries had in fact recognized this issue as a crucial barrier to work-family articulation thereby approving investment plans for the expansion of the public network of formal childcare services, namely for the 0-3 age group. However, budget cuts prevailed and the insufficiencies in public provision remained unsolved. It follows that, despite the affordability of public or subsidized childcare being actually low, the scarcity of services persisted making the combination of work and care hardly possible for families

with no other resources<sup>69</sup>. This gap has not been compensated by other policy measures, namely at the level of work schedules. On the contrary, austerity measures have further limited rights to the reduction of working hours making the combination of work and care practically unfeasible. In both countries, the crisis context and the policy measures it entailed – as the flexibilization of wages and contracts – seriously affected the quality of available jobs, especially for women. Both Portugal and Spain featured, as of 2012, higher wage inequalities than in the previous decade with an especially sharp rise in the Portuguese case. Occupational segregation levels became equally more significant, particularly in Spain with a concentration of workers on female-dominated – hence lower quality – occupations.

#### **1.4. Assessing capabilities for work-family balance in Iberia**

Despite unequally successful in their results, work-family policies in both countries have generally pursued the participation of women in the labour market and the re-distribution of care between women and men and between parents and formal services. From a CA perspective, it follows that alternative combinations of work and care would be possible for mothers and fathers and hence their capabilities as well as their well-being would be improved. However, as shown, the lack of cohesion between different conversion factors clearly limits the reach of policy innovations which, when analysed individually, could be described as capability-enhancing. This analysis has shown that during the timespan of roughly three decades the opportunities to combine work and family responsibilities have indeed improved in both countries, especially in the early 2000's. However, the 2008 economic crisis and the austerity measures it entailed came to curtail these positive developments, especially visible in the case of childcare services and job quality in both countries and of the paternity leave expansion in Spain.

Still, the main question remains: to what extent do Portugal and Spain feature different capabilities for WFB? In general, this study has pointed to both similarities and differences in capability. Nonetheless, it seems to be the case that in Portugal capabilities for WFB are more enhanced than in Spain. Throughout this study, some relevant patterns have come to the fore. In both cases, there are gender inequalities in

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<sup>69</sup> As access to family and neighbours' support or domestic workers.

capability sets, whereby women's choice to work is more constrained than men's and men's choice to care is remarkably more limited than women's. In fact, as men remain the family's main provider, there are no real incentives to take up more hours of care to the detriment of paid work. Evidence of some positive support is only visible in the Portuguese case where male workers are eligible for more extensive and generous parental leave benefits. In the opposite direction, as second-earners and prime-carers, women must struggle with the barrier of scarce formal childcare services which hampers their option to full-time employment. Regarding the case of mothers of very young children this barrier seems to be more significant in Spain both concerning the full-time accessibility and affordability. Adding to this, Spanish women also face comparatively higher wage differentials in relation to male workers. Nevertheless, it is crucial to highlight that women's unconstrained choice to care, that is, without foregoing financial retributions, is also limited to maternity and parental leave benefits. Also, in this dimension, the options available are more generous in the Portuguese case. Finally, gender norms come to the foreground as they tamper with institutional level results. Indeed, despite the fact that Portugal presents more enhanced capability sets, its potential stands in tension with comparatively more conservative attitudes towards family and gender roles, especially concerning women's double role.

After having summarised the main features of capability sets in both countries, the next section will cross the results from chapters III to VI, concentrating on the strength of the relation between the two evaluative spaces for well-being, that of functionings and that of capabilities.

## **2. Tying functionings to capabilities for WFB**

The persistence of gender imbalances in the division of labour in a context of formally equal rights and of modernization of gender cultures constitutes the main puzzle driving this dissertation. In that sense, it fundamentally seeks to determine whether capability sets for WFB can predict patterns of work-family arrangements and, consequently, the possibilities for change. This section thus recovers the previous analyses of work-family arrangements and capabilities for WFB and establishes whether and how they can be related. In doing so, it will address the following questions: How does the mapping of capability sets relate to the effective outcomes in work and care?

The section begins with an analysis of the global evolution of the functionings-capabilities nexus in Portugal and Spain, emphasizing similarities between them. Next, it takes the opposite path and explores contrasts between the cases from an explicitly gendered perspective. Finally, it recovers the theoretical underpinnings of policy evolution during recent decades and demonstrates how a capability-driven analysis brings forward its limitations and consequences in work-family outcomes.

## **2.1. Global patterns**

Globally, the evolution of functionings in WFB between the early nineties and 2012 does correspond to a pattern of enhanced capabilities in the articulation of work and family tasks in Portugal and Spain. Both countries departed from a traditional work-family arrangement which was actively supported by the authoritarian regimes that ruled until the seventies. In fact, this conservative view of gender roles has travelled throughout the centuries and has been shaped in strong proximity with Catholic conservative tradition. For almost half a century, the male breadwinner/female carer model was predominant and indeed promoted by official authorities despite the fact that women often accumulated family tasks with some kind of paid work. Gender cultures mirrored this pattern and institutional support to alternative work-family options was inexistent. Moreover, women's freedoms were restrained at different levels, political, economic, social and even sexual.

As in most Western societies, the evolution of work-family arrangements has since then progressed towards a dual earner model, despite an earlier and more evident start in Portugal. In contrast with other cases which have consolidated a one-and-a-half earner pattern – as the United Kingdom or Sweden - both Portugal and Spain feature an increasing share of full-time female participation in the labour market, thus moving towards a dual full-time earner model. In fact, as chapter III shows, part-time work is not significant in either case, particularly in Portugal. Nevertheless, the share of part-time work that does exist is considered involuntary, mainly concentrated on women and exhibits significantly low levels of job quality. Attitudinal patterns have closely followed this movement and the support for a strict gender division of paid and unpaid work has substantially decreased in favour of more modern and egalitarian principles.

Chapters IV to VI have indeed confirmed that in both cases institutional and cultural factors have contributed to broader sets of opportunities for WFB particularly directed at the dual breadwinner household. In both cases, legal barriers to the employment of women, inherited from the authoritarian period, have been eliminated and work-family policies have further supported new options for the sharing of care tasks between women and men and plus between parents and formal services. Especially since the 2000's, important reforms have taken place regarding the extension, pay level and flexibility of parental leave schemes for both parents. Even though to a smaller degree, both countries have also improved the public provision of childcare services and/or the support of private or non-profit institutions which practice reduced fees. As a result, in the end of the period of analysis, parents have indeed more choices to stay active while their children are in formal care services or to stay home and care – for limited periods of time – without losing their previous work position. However, and despite the fact that parents can more easily articulate work and family tasks, important barriers to WFB still remain untackled, especially concerning the residual implementation of flexible working times, regulations on equal pay and the underlying occupational segregation.

This positive evolution has nonetheless suffered some setbacks during the 2008 economic crisis as the support and financing of alternative strategies becomes more challenging in times of austerity. As previous chapters illustrated, institutional constraints to WFB have increased in this period mostly in the provision of childcare services which, as shown, results in the reduction of capabilities for WFB, especially for mothers. Comparatively more conservative attitudes in Portugal also sustain that in times of scarcity, female employment should be reduced to the benefit of men. Interestingly, in both countries women have managed to maintain their jobs more successfully than men despite these additional obstacles. In fact, due to patterns of occupational segregation, the type of economic sectors first hit by massive job losses strongly influenced work-family arrangements, gaining relevance in this period. It could however be the case that the increasing constraints were revealed in the subjective experience of WFB instead. This possibility was also not confirmed, as satisfaction levels remain relatively constant even in the presence of a more restricted structure of opportunities. Again, the question of adaptive preferences comes to the fore as in

contexts of crises the expectations of individuals regarding their preferred work-family combination can be significantly reduced.

## **2.2. Nuancing similarities**

Despite the fact that both Portugal and Spain have, respectively, consolidated or progressed towards a dual full-time earner model, chapter III has provided detailed information on the prevalent work-family arrangements in Portugal and Spain and highlighted some crucial differences. As argued throughout this study, capability sets for WFB are the result of the interaction of institutional and cultural factors thus presenting specific features in each case that may corroborate or contradict each other. These variations may consequently either sustain or delay progress towards more equitable arrangements. In this sense, to what extent do particular capability sets in each case account for differences in work-family outcomes?

Chapter III has shown that, between the early nineties and 2012, Portugal features significantly better employment outcomes than Spain both regarding the total active population and by gender. Indeed, according to the analysed data, the gender gap in employment is wider in Spain, especially when restricting the analysis to working mothers. In this case, and in contrast to the Portuguese counterparts, motherhood and even marriage still represent a penalty for working women. However, it is important to underline the sharp increase in female employment rates since the early nineties which has diminished the distance from both Portugal and the European average.

When taking institutional factors into account there appears to be a connection between the comparatively more favourable capability sets in Portugal and the higher employment outcomes of women and men, especially with children. Indeed, paid parental leave provisions for both parents are significantly more flexible and extensive than in Spain, childcare services are comparatively more accessible to full-time use and more affordable when taking tax and benefit system into account. Additionally, gender wage gaps are narrower in Portugal, which facilitates the integration and permanence of women in the labour market. Globally, the institutional frame does seem to matter and, in fact, from early on the Portuguese political environment was very supportive of the role of women as workers.

On the other hand, cultural norms on gender roles call for a more careful analysis, as it may be erroneous to classify them as merely modern or conservative. There may be different layers of gender attitudes which do not necessarily stand in agreement. Moreover, even though this research does not aim at scrutinising the relation between attitudes and individual behaviour, chapter I has alluded to frequent tensions between attitudinal patterns and social practices and, in this regard, the Iberian countries constitute good examples. Comparatively more traditional in the centrality of the child and of motherhood, it is in Portugal where women, mothers specifically, are more active in the labour market. However, this attitudinal pattern coexists with a high value imputed to paid work, reflecting the relevance of sharing the breadwinning role and the - at least theoretically - subsequent economic independence. Moreover, there also seems to be some coherence with policy developments regarding the employment of women and mothers, specifically. Spain on the other hand, reveals somewhat more modern and less motherhood-oriented attitudes and also attributes high value to female paid work, but presents considerably wider gender gaps in employment during the last decades. Despite greater attitudinal coherence, some tensions are revealed in relation to the policy level, less progressive than the Portuguese context. Regarding unpaid family work, while some works point to some attitudinal coherence in relation to the overload of women with domestic and care tasks (Crompton 2006, 145), this study points to more nuanced conclusions. Concerning the comparison of the two Iberian countries, more conservative attitudes do not result in a more accentuated gender gap in unpaid work, quite the opposite, as chapter III illustrates. Additionally, as others have argued (Aboim 2010a, 190), the mediating role of attitudinal patterns seems to depend on the specific characteristics of reconciliation policies and labour markets and the extent to which they enhance capabilities for WFB.

When focusing specifically on the particularities of the gender dimension, inequalities in both facets of work-family arrangements are still visible in Portugal and in Spain just as in the generality of Western societies. Indeed, both countries still reflect century-old legacies of the traditional division of labour whereby women have lower paid work outcomes and men lower unpaid family work outcomes. Nonetheless, the first pattern is especially evident in Spain while the latter is more prevalent in Portugal. As chapters IV to VI show, capabilities for WFB are not similar for women and men and this variation is evident in the institutional factors which support them.

Despite the evolution in recent decades, affordable and quality childcare services, with opening hours suited to parents' working times and particularly for very young children, are still scarce in both countries. In addition to gender wage gaps and occupational segregation, this is an obvious limitation to women's choice to engage in paid work and is in fact in line with their generally lower work outcomes in both countries. On the other side of the coin, typically male-dominated occupations are also those with longer working hours thus inhibiting fathers' options to take up care tasks.

Results show that there is no real institutional positive support of fathers' engagement in care tasks, in the case of Spain, or they seem to be somewhat ineffective, in the case of Portugal. This is translated in more limited capability sets and stands in line with their poorer results in this dimension. Even in the case of Portugal, comparatively generous leave benefits for fathers do not seem to concur to stronger results in unpaid family work. In this regard it can be pointed out that policy innovations are relatively recent and, as some works argue (Gershuny and Sullivan 2003), the division of labour in the household is more resistant to change. In this dimension, it is important to underline the fact that there are virtually no tensions between the institutional and the cultural levels as attitudinal patterns globally support a greater involvement of men in the domestic sphere.

Moreover, as previous chapters highlight, policy coherence is crucial. Despite standing beyond the scope of this work, some studies focus barriers at the firm level which constrain men's options to take time off or reduce working times for family reasons, or even to take up parental leave benefits. In sum, it seems to be the case that reduced capabilities for WFB, underpinned by institutional barriers, are in line with weaker employment outcomes for women and weaker unpaid workloads for men. In other words, in the absence of strong positive support, traditional traits persist in work-family arrangements.

### **2.3. Consolidating the line between functionings and capabilities**

Recovering the theoretical underpinnings of this dissertation, it becomes clear that in both cases institutional conversion factors have not been driven by a capability-enhancing perspective. The pursuit of the adult worker model and the ensuing externalisation of domestic and care tasks have in fact been the priority of reconciliation

policies, rather than the expansion of capabilities for WFB. As stated in this section, the evolution of parental leaves has followed an early return to work model, thus allowing parents – especially mothers - to take time off paid work. In addition, public or market provided care services support the externalisation of care, albeit to a smaller extent. Other policy measures, as the flexibility of working times, which would contribute to additional options for WFB, have not received the same attention. The underplay of the issue of job quality is also manifest in the already mentioned low implementation of regulations on equal pay or occupational segregation. Even though this unidimensional logic in the configuration of policies is manifest in both countries it is somewhat less assertive in Spain, especially regarding the parental leave policy. It could be the case that this corresponded to a different work-family articulation logic, such as the dual part-time earner model. However, chapter III has clearly shown that this is not the case, as the share of part-time workers is very low in Spain, as in Portugal. While Spanish mothers can use their maternity benefits on a part-time basis, this has proven to be a clearly insufficient measure to enable different work-family arrangements. In sum, no real alternatives are offered to working parents in either country.

The empirical analysis has shown that in fact the evolution of institutional factors has not occurred within the purview of the maximization of choices for women and for men. As stated above, policy priorities in the field of WFB are primarily the activation of women and, to a lesser degree, the transfer of care tasks both to the state or the market and, most importantly, to men. In this sense, while existent reconciliation policies in Portugal and Spain grant women more opportunities to engage in paid work, they do not offer men a similar choice to stay home and care. In a context of persistence of gender differences in the division of labour and insufficient childcare services, this implies that WFB becomes a question of «*enabling women to work more and to continue to care*» (Lewis 2009b).

From a capability perspective, existent policies – alongside other institutional factors – fail to take into consideration the issue of the valuation of care work and the ensuing right to care of both mothers and fathers. Following the principle that caring and labour market participation are equally valuable outcomes, reconciliation policies should grant both parents the possibility to stay home and care without foregoing economic independence. The issue of financial compensations has actually been underlined both by feminist and CA authors and it goes hand in hand with the question

of the valuation of care (Lewis and Giullari 2005; Mazur 2002; Goertz and Mazur 2008). Foregoing this principle may result in the misinterpretation of capabilities for WFB, especially for women. In this regard, the Iberian countries have again proven to be valuable objects of comparison as they illustrate the extent to which a gendered analysis of WFB must always have the economic independence of women as the cornerstone. As the result of consistently higher wage levels, Spanish families – generally speaking – have been able to be sustained with only one salary, usually that of the man. In contrast, in the majority of Portuguese households, two full salaries are needed to meet demands. It follows that, in comparison with their Portuguese counterparts, Spanish women have more frequently the option not to work and to stay home and take on family tasks. However, they do so without any financial compensation which means that while higher wage levels grant them the opportunity ‘not to work’ it comes at the cost of remaining under the dependence of the male wage. It is, in short, a highly constrained choice and most definitely not a case of enhanced capabilities for women.

## **Conclusion**

This chapter summarizes and reflects on the main research findings presented in this dissertation. Firstly, it restates the research problem and how it was addressed, both theoretically and methodologically. Specifically, it recovers the main contributions of the theoretical framework adopted and the guiding research questions. Next, it offers a summary of the most substantive findings, assessing their relevance in light of previous works and their main implications for theory advancement and policy practice. The limitations of data and pitfalls of the analytical framework are also discussed. Finally, it makes some recommendations for future research which result both from initial questions that remain unanswered at the end of the dissertation and from new issues which have emerged in the course of the investigation.

### **1 – Analytical framework and research questions**

This study has investigated opportunities for WFB in Portugal and Spain between the early nineties and 2012 and questioned the extent to which they are related to actual patterns of articulation of work and family responsibilities. With the transition to post-industrial societies, transformations in the fields of the family, labour markets and welfare states have fuelled debates around WFB. The increase in the share of households with two working adults – mostly due to the integration of women in the labour market – has been a common pattern in Western societies and similarly in the Iberian countries (OECD 2011b, 2014), with women remaining the primary (or only) carer. In fact, changes in the breadwinning role of women have not been accompanied to the same degree by changes in the role of men as carers, albeit some evolution namely at the attitudinal level. The resulting imbalances in the amounts of time devoted to paid and unpaid work have become one of the issues that affect the most the well-being of families in Western societies and political and academic discourse and research has hence adopted work-family balance as a central goal to be achieved.

Yet, as this study discusses, its ubiquity in popular, political and academic discourse has not resulted in a consensual conceptualization of the topic but rather in some ambiguity concerning the three terms which compose it. In order to avoid unclear interpretations it starts by setting apart subjective assessments of balance from the

actual strategies used by couples to articulate work and family life. These strategies are materialized in the specific amounts of time that female and male partners devote to employment and unpaid family work and hence on gendered patterns of the division of labour. The evolution and variation of these work-family arrangements in Portugal and in Spain has been the point of departure to this dissertation. Concerning the work-family dichotomy it draws attention to the fact that the conceptual boundaries of the term "work" have changed in the last decades and the idea of care as labour as gained prominence, especially on gender analyses.

Despite common transformations in the work and family dimensions in European societies, there is the need for the consideration of the particular forms of evolution in work-family arrangements. Previous explorations of the Portuguese and Spanish cases have mainly incorporated large-scale comparative works or consisted on single case studies. This dissertation follows a different strategy emphasizing the relevance of the comparative analysis of the two Iberian cases, namely on the topic of work-family balance. The adoption of the most similar systems design emphasizes the fact that the sharing of key features at the historical, political, economic and cultural levels does not necessarily equate with identical results in the distribution of paid and unpaid work or in the options to do so. The analysis of patterns of work and family articulation in the Iberian countries reinforces the argument that this evolution has indeed followed specific routes and paces even in societies with very similar backgrounds. The selected time frame spans from the early nineties to 2012, starting in a period when both democracies had already been consolidated and become part of the EEC. While encompassing the main policy reforms in WFB in both countries, it maximizes variation regarding gendered patterns of employment and also accounts for the specific context of economic recession that strongly affected both countries.

Previous discussion and research on the issue of the division of paid and unpaid work and its gendered implications has emphasized either the role of individual agency (through utility or preferences) or the role of normative and institutional constraints, thus failing to disentangle relevant variations in comparative studies. In contrast to these previous works, the analytical model followed in this study captures the role of individual agency – choice – within an environment of opportunities and constraints. It draws on recent adaptations of the capability approach (CA) to the field of WFB, and therefore the concepts of "situated agency" and "real choice" represent the theoretical

underpinnings of this dissertation. The first concept speaks directly to the notion of human diversity, emphasizing not only differences among individuals but also among groups. In this sense, the existence of disparate opportunities and constraints for women and men are at the centre of the analytical model. The second concept brings to the fore the notion of “real choice”, allowing for a more comprehensive understanding of the mechanisms that influence that same act of choice and, ultimately, inequalities in work-family outcomes. On the one hand, it brings together cultural and institutional factors in shaping decisions and on the other hand, it confers to employment and care the same value as achieved functionings. The valuation of the option to care in equal terms with paid work is the central assumption of the adaptation of the CA to studies of WFB and one of its main advantages.

This dissertation was built around three key objectives. It started with the empirical exploration of work-family arrangements in the selected cases, Portugal and Spain. The questions posed were the following: how have patterns of articulation of employment and unpaid family work evolved between the early nineties and 2012? and, How gendered are outcomes? In contrast with works which focused only in one dimension (employment or care), this study conferred the same value to both outcomes which represent central features of women’s and men’s well-being. In order to obtain a more comprehensive understanding of the prevailing strategies for WFB in the Iberian context, it also considered satisfaction levels in an attempt to grasp the connection between the perceived alternatives to WFB and the results actually achieved.

The second main objective was the assessment of capability sets for WFB and of the multi-level factors that interplayed in their definition. Regarding the set of options available to articulate employment and family the main assumption was that the broader the set of unconstrained choices available to men and women, the broader the capabilities to balance work and family. In order to understand which barriers or incentives women and men experienced in the period of analysis, capability sets have been deconstructed in institutional and cultural factors which moulded possibilities for WFB. As in the rest of the dissertation, the analytical focus has been on gender equality taking into account both the premises of the traditional division of labour and recent policy trends which emphasize “reconciliation for women”, rather than real choice regarding work and care for both mothers and fathers. At the institutional level, the following conditions were expected to impact positively on the options available for

WFB: *the existence of paid parental leaves and, especially, paid paternity leaves; the availability of affordable, accessible and high-quality childcare services and the existence of tax concessions, fees reductions or cash benefits towards childcare; low levels of occupational segregation of the labour market; low gender pay gap and the individualization of working time.* Further, in the cultural dimension, *the prevalence of modern values towards family and gender roles* was expected to increase alternative options for WFB.

The final objective of this dissertation was to determine how WFB patterns were linked with capability sets. In other words, it attempted to elicit whether and how capabilities for WFB were associated with concrete patterns of work-family arrangements and the longitudinal, cross-country and gendered variation they entail. This was underpinned by the following theoretical assumption: the extent to which women and men are involved in paid and unpaid work, that is, the chosen work-family arrangement, not only illustrates the achieved functionings but also, and most importantly, points to gender inequalities in capabilities. In this sense, the larger the inequalities in capabilities, the larger the inequalities in achieved functionings, that is, in the division of paid and unpaid work.

## **2 – Key findings**

Empirical findings in chapter III established that concerning the visible aspects of WFB, that is, the involvement in paid work and family tasks, there is a clear variation between the selected cases. While Portugal features a pattern of consistently high employment rates and low unpaid workloads, in Spain the results go in the opposite direction whereby low employment levels have coexisted with high unpaid work. Until the start of the economic crisis, both female and male employment rates show a positive evolution. Nonetheless, the sharper increase has been in the employment rates of Spanish women which points to a consolidation of the dual earner model which had already been achieved in Portugal at the start of the period of analysis. The question of the double burden thus gains relevance in the Spanish context as unpaid workloads for women do not decrease in proportion. Despite this evolution, gender inequalities in the division of labour are still visible in the Iberian countries, especially in Spain which features the larger gender gaps in employment and in unpaid family work, to the detriment of women. These results stand in contrast with earlier studies on welfare and

care models which identify Portugal and Spain with similar familialistic patterns. On the other hand, there have been significant changes during the last three decades in work-family arrangements and they imply that even in Spain, where a more traditional arrangement prevailed until the nineties, this is no longer the case. As a result, these classifications should be reviewed in light of recent data and the clear distinctions between the two neighbouring countries should be recognised.

This study has proposed that inequalities in achieved functionings, that is, in paid and unpaid workloads, are associated with inequalities in capability sets. Empirically, this implies that the larger gender inequalities in WFB present in the Spanish case should correspond to more significant gender inequalities in the options available to articulate employment and unpaid family work. Similarly, the opposite should be valid for the Portuguese case. In order to verify this hypothesis, it was necessary to determine which combinations of work and care were available to women and men in both cases, during the period of analysis. That was the task of chapters IV, V and VI.

The findings are straightforward: regarding the components of capability sets, there has been a consistent and globally positive evolution of all of them during the period of analysis. Nonetheless, not all conversion factors are equally capability-enhancing. Institutional factors, namely reconciliation policies, have taken the forefront in this respect and showed the more positive evolution. In this sense, findings do confirm previous works which highlight the role of policies as enablers of choice. Labour market features, in contrast, contribute to a much smaller degree to the enhancement of capability sets in both cases. Empirical results also point to more enhanced capabilities for WFB for Portuguese women and men when compared to Spain.

Specifically, chapter IV has shown that in the end of the period of analysis both countries offered paid parental leave entitlements to mothers and fathers but the corresponding gender gap was still wide, especially in Spain. Furthermore, the Portuguese leave system was especially effective in enhancing fathers' capabilities to engage in care for their children. These results underline the fact that the Portuguese case is not adequately addressed in the existing literature on WFB, as it is usually treated as a typical case of low state support for the articulation of work and family. As expected, findings show that differences in the provision of childcare services,

especially for very young children, are very narrow between the two cases. However, a more detailed analysis in terms of intensity of use points to a higher availability of full-time services in Portugal as well as to slightly lower costs, especially for low-income families. There are several limitations in the indicators used to assess childcare, the most relevant of which being that it refers to the use of the services and not to the actual offer. There are, of course, several problems in inferring the availability from parents' decisions on their effective use. But it is, in fact, the only indicator available for longitudinal comparative studies and the most commonly used, including by international agencies. Further, it misses out regional variations, which previous studies have shown to be significant. As a rule, it is in urban centres where unmet demand is higher. Despite this being a relevant analytical dimension, it is beyond the scope of this dissertation, which is restricted to the national level.

As illustrated in chapter V, conversion factors regarding the labour market and job quality have shown little progress during the period of analysis. With the exception of the gender pay gap, data on this dimension is extremely scarce, especially longitudinal comparative data. Nevertheless, empirical findings point to a relative disadvantage of Spanish women, who face higher gender pay gaps. The weak or almost inexistent implementation of flexible working times represents a clear lack of positive support which is crucial to the enhancement of capabilities for WFB. In a context of scarce childcare coverage, individual working times would significantly facilitate the articulation of schedules of care services and paid work. Finally, attitudes on gender roles only partially support the hypothesis on cultural conversion factors. While it is true that the progressive modernization of family and gender values went hand in hand with the enhancement of capabilities, the variation between the two countries did not follow the same path. In fact, more modern attitudes on gender and family roles in Spain are not reflected in wider capability sets for WFB. The case of Portugal is somewhat more nuanced as modern attitudes coexist with a high value imputed to the role of women as mothers. As a result, attitudinal patterns are more favourable to enhanced capabilities to work than to care.

The central goal of this dissertation was to determine whether and how the sets of alternatives available for Portuguese and Spanish women and men were in fact associated with the patterns of division of paid and unpaid work. At this point, it is important to recover the concepts of “situated agency” and “genuine choice” which

entail that “what one would choose is bound up with the real opportunities to choose”. In this sense, outcomes on employment and care are the result of an act of choice over existent alternatives, hence a subset of capabilities. Following this study’s empirical findings, reduced capabilities for WFB are indeed associated with weaker employment outcomes for women and lower unpaid workloads for men in both countries. The cross-country analysis leads to similar conclusions. Despite capability sets for WFB being significantly reduced both in Portugal and in Spain, Portuguese parents are offered a better set of possibilities for articulating work and family tasks. And this is especially reflected on parental employment rates. However, it is important to underline that functionings do not equate capabilities, that is, they are the result of an act of (more or less) constrained choice at many different levels, which this research only began to disentangle. The consideration of equality of capabilities as a normative anchor for assessing work-family balance in Iberia has brought new light to this issue, moving the focus from gender-symmetrical results to the maximization of choices for both women and men.

### **3 – Main contributions**

As stated, the research employed a comparative perspective under the most similar systems design which selected Portugal and Spain as the two cases for analysis, building on previous works which have followed this same strategy. It adds to this literature as it concludes that, despite similarities on global patterns of evolution, the specificities of work-family arrangements and the structures of opportunities which underpin them are, in some instances, significantly divergent in the two cases. More generally, it also contributes to debates on the south European welfare model as it recognizes commonalities, as the persistence of familialistic traits in welfare provision and in gender norms, but also scrutinizes differences, namely in patterns of paid and unpaid work, in reconciliation policies and in labour market features. Despite the utility of larger scale studies for comparative goals, this investigation brings to the fore central features of work-family articulation in Portugal and Spain which have been often overlooked in previous works resulting in misleading interpretations of the contrasting realities in Iberia.

Theoretically this dissertation has adapted premises of the CA to the study of WFB in two distinct evaluative spaces: that of functionings and that of capabilities. This

option has implied, as stated, several challenges and analytical limitations but, most importantly, has resulted in an innovative study which contributes to the expansion of research on WFB. First and foremost it bridges the gap between the role of choice and constraint in the division of paid and unpaid work as they are, in fact, inseparable elements. It starts from a crucial principle, the equal valuation of paid and unpaid work, which, by itself, already carries great implications for the subsequent analysis. Many previous explorations of the topic have focused on only one dimension of the work-family equation, the first rather than the latter. This research has shown that the attribution of an equal value to employment and care implies that not only the employment of women must be promoted but also the place of men in caregiving. Further, that caregiving is not an impediment to a more productive society but a right and an equally legitimate option for both women and men and hence should be rewarded accordingly.

There are, in fact, many policy implications that derive from this apparently simple principle and they became visible in the analysis of capabilities conducted in chapters IV, V and VI. From a gender perspective, it contrasts with previous studies as it does not focus on the equality of functionings that is, it does not aim at a gender-symmetric division of paid and unpaid work. Rather, it aims at the equality of freedom to choose between paid work and care. It changes the analytical focus from the end results to the viable options to women and men and this is indeed a major contribution that departs from other approaches with a more prescriptive nature.

It further reveals the limitations and gender biases of current policies and the extent to which they curtail free choice to work and/or care for women and men and points to alternative paths of reform at the institutional level. It recognizes that the provision of time and financial compensations in the sphere of care is a challenging task for state budgets, especially in the context of economic crises, as was the case of the selected period and cases. Nevertheless, it raises new questions both on the principles that drive policy-making and type of inequalities which are in fact being addressed or produced.

This dissertation has also contributed for the advancement of the studies which pursue alternative frameworks for welfare reform in Europe. In contrast with mainstream welfare state analysis, this analytical approach goes beyond the measurement of work-family outcomes. It focuses instead on the extent to which

institutional factors mirror women's and men's aspirations for WFB and enable the possibility to bridge the gap with reality. This entails that shifting rather than static state-market-family configurations take central stage. Indeed, the institutional analysis is not based on pre-determined problem-solution logic but instead on the recognition of potentialities for change, adapted to the specific political, economic and cultural context. More globally, this implies that the modernization or adaptation of welfare states is not presented as deterministic but as a political choice (Bonvin and Laruffa 2017).

#### **4 – Main limitations and future research**

There were in fact several limitations to this investigation, both theoretical and data-related, that have already been pointed out throughout the study and which may influence the validity of the results.

Firstly, there were considerable challenges in the operationalization of the selected variables. Work-family balance has been assessed both in terms of the practical arrangements and of the viable alternatives that women and men have to articulate paid and unpaid work in both countries. In the first case, the option of combining data on achieved functionings with data on satisfaction levels has not resulted very fruitful. On the one hand, the available data on the latter were too limited to conduct a proper longitudinal analysis and on the other hand, the variation patterns which resulted could not be associated neither with variations in functionings nor with variations in opportunities for WFB. However, this apparent stability of satisfaction levels – even during an economic crisis - also introduces interesting questions for future research namely concerning the drivers of satisfaction levels with one's work-family balance. Furthermore, comparative data on unpaid workloads do not go back to the early nineties, as employment data do, and there are some methodological discrepancies among the three survey waves. This analysis has emphasized the need for more frequent and detailed surveys on unpaid family work patterns as it has shown that inequalities in the household are exactly the most resistant to change.

The assessment of capabilities for WFB was probably the greatest challenge posed by this dissertation, as the operationalization of capabilities is anything but straightforward. The path followed in this study was to derive capabilities, that is, viable

alternatives, from the options made available by reconciliation policies and also taking into account barriers at the labour market level and gender norms. Naturally, the selection of the analytical dimensions does shape the end results and, for practical reasons, it is impossible to consider the whole universe of incentives and constraints that is at work at the individual level. Comparative data disaggregated by level of income, education and regions would be particularly useful as previous single-case studies have shown the relevance of these indicators. It would also allow for a more detailed analysis of inequalities which would go beyond the gender dimension and into intersectional inequalities. Furthermore, the firm or the organizational level has, in the last decades, become a central element of analysis due to the growing deregulation of market structures which has provided more space for firms to act on WFB issues. It is therefore an important focus for future research. Regarding the analytical dimensions which have, in fact, been taken into account, comparative data on labour market features, namely occupational segregation and working time flexibility are extremely scarce and represent an important limitation for this study. The downplay of the labour market dimension in relation to reconciliation policies in the final assessment of capabilities might have been influenced by this severe data limitation and it is therefore an important challenge for future works. Data on gender norms, in turn, was also temporally limited which affected the comparative analysis in the period from the early nineties to the early 2000's.

The idea of human diversity has been at the core of this dissertation, putting forward gender as a key analytical category. Indeed, following Sen, the issue of gender inequalities in work-family balance is ultimately one of disparate freedoms for women as for men. However, it has become evident in the course of this investigation that gender is only one – albeit central - facet of human identity that shapes possibilities for balancing work and care. It in fact intersects with other relevant categories as class, education level or citizenship status which will amplify inequalities in capabilities not only between women and men but also and most importantly amongst women and men. This is indeed an exciting and promising field of research and future work should provide a more detailed view of the constellation of factors that shapes choices on work and care against a backdrop of wide human and group diversity.

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