

**WOMEN'S EXPERIENCES WITH MIGRATION  
IN NICARAGUA:  
CONNECTIONS BETWEEN  
GLOBALIZATION AND LOCAL HEALTH**

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By

Madeline J. Johnson

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University of Saskatchewan  
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## **Abstract**

Economic globalization is characterized by increased liberalization, privatization and deregulation of national economies, principally imposed via the International Monetary Fund's and World Bank's structural adjustment programs and poverty reduction strategies. The rationale for these strategies includes reducing the inflation rate, generating income to service debt payments, and increasing growth to combat poverty.

Nicaragua, the second poorest country in the Western Hemisphere, has been under structural adjustment and poverty reduction strategies since 1991. Forty-eight percent of the country is under the nationally defined poverty line. Under- and unemployment are a combined 60%. Migration is an oft-used survival strategy, with 7 out of 10 Nicaraguan migrants choosing to go to Costa Rica. The Nicaraguan Migration Network estimates a minimum 350,000 Nicaraguans in Costa Rica at any one time.

Women bear a disproportional burden of the health inequalities that globalization-induced, employment-seeking migration causes. While there is already evidence showing that their health is negatively affected, there is no documentation in their own words of how they experience and understand these impacts. A qualitative study using interpretive description conducted 12 interviews and 2 participatory group activity sessions to explore how women understand their migration experiences and its health impacts.

Results show structural and personal level causes and both beneficial and harmful effects. Explanations of causes include structural and cultural reasons. Migration affects women in particular ways due to gendered social and cultural roles within a polarized economic environment. It was difficult for participants to identify if the costs of migration were worth the benefits. A document analysis of structural adjustment agreements and poverty reduction strategy papers was also undertaken. Results show consistent limitations on the Nicaraguan government's social spending budget, increased privatization and liberalization requirements, and specific amounts for debt service payments. The country's currency is regularly devalued and there are limits on tariff barriers.

In conclusion, it is clear that women are absorbing the cost of SAPs and PRSs at the household level and that migration is negatively affecting their health.

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If you have come here to help me, you are wasting our time.

If you have come here because your liberation is bound up with mine, then let us work together.

~Lilla Watson

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# 1. Introduction

## 1.1 Introduction

For many years, health researchers have been increasingly concerned with social determinants that influence health (1-5). More recently, globalization (especially its economic features) has been seen as an important causal context for many of these social determinants (6-9). Economic globalization is characterized by increased liberalization, privatization and deregulation of national economies. While undertaken voluntarily by many high- and some middle-income countries, and entered into through negotiated regional and world trade agreements, economic globalization has also been imposed on many low-income countries via the International Monetary Fund's and World Bank's structural adjustment programs and poverty reduction strategies. The rationale for these strategies includes reducing the inflation rate and generating income to service debt payments, while also increasing growth to indirectly combat poverty (10). Culture also plays an important role in filtering economic impacts on societies (11).

Nicaragua, the second poorest country in the Western Hemisphere, has been under structural adjustment and poverty reduction strategies since 1991. Almost half of the population is under the nationally defined poverty line, and among the working age population, 60% are either under- or unemployed (12,13). Consequently, migration to neighbouring countries to seek employment is an oft-used survival strategy, with 7 out of 10 Nicaraguan migrants choosing to go to Costa Rica (14). The Nicaragua Migration Network estimates a minimum 350,000 Nicaraguans in Costa Rica at any one time. Official sources show over 216,500 legal border crossings of Nicaraguans into Costa Rica in 2005 alone, representing an increase of more than 400% since 1991 (15). The health and experiences of

women are of particular concern since they bear a disproportional burden of the health inequalities that globalization-induced, employment-seeking migration causes (16-25).

The purpose of this chapter is to describe the study in terms of its goals and the research questions; how research questions were developed and the rationale for the study; the process of carrying out the research; and the organization of the written presentation.

## **1.2 Goal and Research Questions**

The goal of this study is to better understand how women experience the health impacts of employment-seeking migration from Nicaragua to Costa Rica, and how their experiences are linked to globalization. To achieve this goal, the study posed the following questions:

1. How does the migratory experience affect women's health for (a) women who migrate; and (b) women who remain, but whose family member(s) migrate?
2. How do the local employment/living contexts of these women affect decisions to migrate?
3. How do economic globalization phenomena (specifically, liberalization and privatization as part of and in addition to structural adjustment programs (SAPs) and poverty reduction strategies (PRSs) affect these local contexts?

## **1.3 Development of Research Questions and Rationale**

The main topics of migration and women's health in Nicaragua were originally suggested to me by Lori Hanson, faculty in the department of Community Health and Epidemiology at the University of Saskatchewan. My previous knowledge of and experience in Nicaragua indicated a link with processes of globalization, which were confirmed in preparing a literature review for the thesis proposal. The literature review also revealed little information in women's own voices about how they understand and experience migration, and its context within globalization processes, a gap which was confirmed by the local migration organization I worked through in Nicaragua, the *Red de*

*Migraciones*. Canada's membership in organizations that facilitate the diffusion of economic globalization forces (such as the International Monetary Fund, the World Bank, the World Trade Organization, the G8, and the Club of Paris) provided some relevance for such a study by a Canadian student in Nicaragua.

#### **1.4 Research Process**

The data collection aspect of this study was carried out in Nicaragua during the months of May – September 2005. As described in more detail in Chapter 3, answers to the research questions were sought through semi-structured interviews and participatory group activities, as well as document analysis of the conditionalities required in Nicaraguan loan agreements with the International Monetary Fund (IMF). A total of 12 women were interviewed. Participatory group activities involved some interviewees as well as 15 additional participants.

Results of the interviews and group activities were coded and analyzed for themes, and loan conditionalities were summarized to show their connections with social determinants of health.

#### **1.5 Organization of the Written Presentation**

My thesis begins with a review of the literature on globalization, health, and migration, in addition to the Nicaraguan context. Chapter 3 outlines the methodological framework and methods used in this study. Chapter 4 presents a more detailed description of participants' contexts and the results from interviews, group activities, and IMF loan agreements. Chapter 5 analyzes the relationships between globalization, health, and migration in Nicaragua. Finally, Chapter 6 reviews the goal of the study and comments on

limitations and implications for further research; my personal reflections about the research are also included in this chapter.

## 2. Literature Review: Globalization, Health, Migration, and Nicaragua

### 2.1 Globalization

While there is no single agreed-upon definition of globalization, Labonte provides a fairly comprehensive one around which considerable consensus exists: globalization is “a process by which nations, businesses and people are becoming more connected and interdependent across the globe through increased economic integration and communication exchange, cultural diffusion (especially of Western culture) and travel” (16, p1). This process is “reinforced by an increasing number of multilateral institutions and rules” (26, p1). There are widely divergent views of what globalization means in terms of its economic and social repercussions.

Globalization has many aspects that are often beneficial, especially in the widespread diffusion of technology and the greater ease of communication over long distances. Despite these positive aspects, much of the world is disgruntled with how globalization is proceeding. Protests in low-income countries against structural adjustment and neoliberal policies have been occurring since the 1980s and into the 1990s (27). Noticeable participation by citizens of developed countries in large, vehement protests where the institutions that reinforce globalization meet took hold in Seattle in 1999 (a Ministerial meeting of the World Trade Organization) and although those protests are meeting with ever increasing security, there does not seem to be a decline in protest efforts or organizing (28,29). Well-known protester and author Naomi Klein claims that globalization has to do with “the forces whose common thread is what might broadly be described as the privatization of every aspect of life, and the transformation of every activity and value into a commodity” (30, p82). Growing inequities (cited most often in terms of inequalities in wealth, income, and consumption), both within and between countries, are

seen as another harmful result of contemporary globalization (31). Recognizing that resistance to globalization encompasses a broad range of viewpoints, for most it is “anti-corporate, anti-capitalist, anti-free trade, [and] anti-imperialist” in nature (29;30, p81). The quarrel with globalization, then, is concentrated on its economic and business aspects, which are often forced choices for economically less powerful countries (32). These economic and business aspects of globalization are characterized partly by “increasing liberalization in the cross-border flow of finance capital and trade in goods and services” (16, p1). The national and international policies that govern these transactions are based almost exclusively on the economic theory of neo-liberalism. In this study, globalization will be understood in this context.

### **2.1.1 Neoliberalism**

Neoliberalism is used most often to describe an American economic theory that has its roots in 1950s work from the University of Chicago. Its fundamental presuppositions are “not simply economic, but moral and in a sense metaphysical: the idea that wealth and poverty, like all other aspects of economic and social life, can basically be understood in terms of individual ‘choices’” (33, p54). There are a number of characteristics and beliefs that form the core of neoliberal theory. They include: “those who exchange society’s resources through market interactions are making the best possible use of those resources”; if market mechanisms are allowed to “operate unfettered,” they will lead to “optimal outcomes for society as a whole”; that it is “self-evident” that there should not be external regulations on the market, but that the market should “regulate society as a whole”; and a rejection of the notion of “democracy as ‘equality of condition’ in favour of ‘equality of opportunity’” (33, p52-55). A free market, then, allows people to make their own choices and also to suffer or reap the consequences or benefits, reflecting the assumption that in

such a system everyone has the same chance. Epitomizing the so-called ultimate freedom of choice, defenders of such economic globalization forces might ask:

If people want to sell themselves, why should they not? If parents do not want to send children to school, why not allow them the choice? If university education is no longer free, perhaps a child from a poor family can borrow to pay for it? If people do not have money to pay for a cure or a drug, what else can be done to ensure cost recovery? (34, p679)

Specific neoliberal objectives for economic policy carried out at the national level include central banks' control of interest rates and money supply to stabilize inflation and growth in Gross National Product (a summary measure of all economic activity) (33). "When translated into policy, neoliberal theories yield a triple prescription: liberalization, privatization, and deregulation. To keep price levels stable, neoliberals advocate strict limits on public spending, particularly social spending" (33, p54). Liberalization refers to the reduction or removal of barriers to the global flow of goods and services by reducing border barriers (tariffs) or domestic policies that might discriminate against foreign goods, suppliers or investors. Privatization refers to the transfer of previously state-held assets into privately held property, through sell-offs of such assets or contracting of private companies to provide public services. De-regulation refers to removing regulatory barriers that might impede processes of liberalization or privatization.

Neoliberal policies do not only have a domestic reach, hence their popularity as the basic construct for globalization's vehicles in the form of "imposed macroeconomic policies; enforceable trade agreements and associated trans-border flows in goods, capital and services; and official development assistance as a form of wealth transfer for public infrastructure development in poorer nations" (16, p10). Margaret Thatcher's Britain and Ronald Reagan's USA kicked off the 'new' wave of neo-liberalism, while the policies of the World Bank (WB) and International Monetary Fund (IMF) (collectively known as the international financial institutions or IFIs) have a much farther reach in spreading the

ideology. The World Trade Organization (WTO) is the third multilateral institution that, along with the IMF and WB, currently has the most influence in setting global economic/trade policies that run along neoliberal lines.

It is important to note that the neoliberal policies that promote globalization are not applied equally or evenly across the world. Poor countries are often forced into acceptance of neoliberal policies as conditions for receiving money (loans, debt forgiveness or aid), while rich nations sometimes pick and choose which policies will benefit them the most. These current practices are why globalization has been characterized as having two faces: “the benign one, based on voluntary exchanges and free circulation of people, capital, goods, and ideas; and the other face, based on coercion and brute force” (34, p667).

### **2.1.2 Structural Adjustment Policies [SAPs] and Poverty Reduction Strategies [PRSs]**

Two important issues to explore in a discussion on globalization are (a) the macroeconomic conditions required for loans or debt relief from the IFIs, originally known as structural adjustment programs (SAPs) and more recently as Poverty Reduction Strategies (PRSs), and (b) how these and other economic aspects of globalization affect poverty and inequalities, which are two of the most important determinants of health.

The 1970's oil shocks created the climate in which modern structural adjustment originated. Two massive oil price increases by the Organization of Petroleum Exporting Countries (OPEC) (the price quadrupled in 1973 and tripled again in 1979/1980) caused a surge in the prices of raw commodities and a substantial increase in the holdings of international banks (where the oil profits were deposited), which in turn began to lend these holdings to developing countries without serious consideration of those economies' ability to manage the debt load (35). Developed countries (operating within neoliberal theory)



responded to the shocks by reducing their imports of raw materials and countered inflationary pressures by raising interest rates and depressing demand as a result of high unemployment (35). This left developing countries (many of whom were overly reliant on their primary product exports for earning income) in a multi-pronged crisis: they had to borrow money to pay for imported oil essential to their economic development, they had lost their primary means of generating income from their primary commodity exports, and their debt escalated rapidly due to interest rate hikes. Financial institutions, in turn, began to realize the precarious situation they were in with respect to the decreasing likelihood of recovering the principal and interest of the loans they had made (35).

In 1986 the IMF began to offer, “assistance to low-income developing countries facing protracted balance-of-payment difficulties,” referring in part to their lack of income earnings with which to service their debt payments (35, p27). (Balance-of-payment refers to the total outgoing amounts, or debits, of a country vis-à-vis incoming amounts, or credits). In order to be considered for loans, countries had to agree to the numerous measures known as structural adjustment policies (SAPs) prescribed by the Fund for purposes of “fostering economic growth and strengthening the balance-of-payments position” (35, p27). Due to the IMF’s neoliberal view that markets free of heavy state influence will allocate resources in the most efficient way possible, structural adjustment seeks to correct deficiencies in the economy (initially focusing on balance-of-payment problems) with a package that includes the following five major areas of reform (35, p33):

1. To allow markets to work by allowing the free market to determine prices;
2. To reduce the state control on prices, such that prices may be set by scarcity values;
3. The divestiture of resources held by the state, into the private sector;
4. The reduction of the state budget as far as is possible;
5. A reform of state institutions to reorientate the role of the bureaucracy towards the facilitation of the private sector

The steps taken to achieve these reforms include: eliminating import controls, reducing tariff levels (a tariff is essentially a tax on imported goods), providing a uniform tariff structure, reducing existing restrictions on foreign investment, adjusting the exchange rate (“to provide for the profitability of export industries”), setting interest rates above the level of inflation (“to reduce, and then eliminate, excess demand for credit”), removing minimum wage controls, contracting out government-provided services, ending subsidies, and currency devaluation (35, p34). This set of reforms is considered ‘stabilization’ with loans lasting 12-18 months, and is often described as a “shock treatment to the economy in order to reduce internal and external dis-equilibria and promote growth” (35, p34). The second part of the process is usually longer-term (lasting approximately 3 years) and is focused more on market liberalization and public-sector reforms (35).

In response to opposition to and failure of SAPs, in September 1999, the WB and IMF introduced poverty reduction strategies (PRSs) as a new iteration of its program (36). Loans under the new program, however, contain many of the same policy requirements as SAPs, such as increased market access and liberalization, a focus on exports of cash crops, privatization of state owned enterprises or contracting out of public services, and user fees for such resources as land, water, health services and education (37). This has led some to ask if the IMF just wanted to distance itself from the discredited term ‘structural adjustment.’ The new program requires the use of a new tool, the Poverty Reduction Strategy Paper (PRSP). A particular process is required in developing this document, the intent of which is to address the weaknesses of SAPs in relation to poverty reduction. The five core principles of the process are (38, p4):

1. Country driven – involving broad-based participation by civil society in all operational steps;
2. Results oriented – focusing on outcomes that would benefit the poor;
3. Comprehensive in recognizing the multidimensional nature of poverty;

4. Partnership oriented – involving coordinated participation of developmental partners (bilateral, multilateral, and nongovernmental);
5. Based on a long-term perspective for poverty reduction

Countries qualifying for WB or IMF loans must draw up a PRSP outlining the framework chosen by the country for poverty reduction (38). If a low-income country desires partial debt-relief under the Highly Indebted Poor Countries initiative (HIPC), it must develop and submit an Interim PRSP (I-PRSP) which diagnoses poverty in the country and outlines a consultation process for developing a final PRSP. Approval of a PRSP is only granted if the framework outlined by the country is considered to be ‘sound policy’ by Joint Staff Assessments (a collaboration effort between WB and IMF staff) (38).

Although the process to receive loans or debt relief is now somewhat different, there has not been much change in what the IFIs believe is the ‘cure’ to economic ills; PRSPs must still show a framework based on the neoliberal package (liberalizing trade and foreign investment, a minimalization of the state sector, and increased privatization) in order to be approved for funds (37). Main criticisms of the new process further include a weak participatory process by and disillusionment amongst civil society organizations, since the language of the final document is often substantially different from that approved during the consultative process (36). Moreover, while a PRSP must be prepared in order for the country to receive a loan, it is not yet clear that the final PRSP document has a significant influence on the resulting terms of the loan agreement (36). Other important criticisms are that the IMF has just forged ahead with process changes without critically examining the assumptions and philosophy underpinning its economic policy planks (10).

### **2.1.3 Globalization’s Outcomes**

One of the stated outcomes of SAPs, made more explicit in the re-named PRSPs, is reducing poverty. Indeed, proponents of the neoliberal model of globalization rest their

claims on its abilities to reduce poverty, while most critics of this form of globalization accuse it of doing the reverse by actually increasing poverty and inequalities. As such, it is important to investigate some of the evidence surrounding these competing claims.

First, there is great controversy over defining poverty and, by extension, counting the poor. The generally accepted axiom at the World Bank and supported by noted economist David Dollar is that the neoliberal globalization practices of market integration will lead to economic growth, which will lead to wealth, reduce poverty and increase health (39). To prove or disprove this tenet, it would seem that all one needs to do is look and see if over the last period of intense globalization (approximately 1980 to 2000) there has been rising world income. Arguably, however, the most important point in addressing poverty and inequality is the choice of measure. Robert Hunter Wade outlines the difficulties in making conclusive statements on these issues.

Some people say that the income of the poor rise ‘one-to-one’ with average income, implying that economic growth is good for the poor ([O]n average there is a one-to-one relationship between the growth rate of income of the poor and the growth rate of average income in society’- World Bank 2002). Others say that the lack of a fall in the number of people in extreme poverty despite historically high rates of economic growth – both in the world as a whole and in specific countries (notably India) – suggests that economic growth does little to reduce poverty. The fact is that our currently available data do not allow confident conclusions (Deaton 2001). The World Bank’s poverty numbers come from household surveys, while the economic growth measures come from the national income accounts. In many countries there are large and growing discrepancies between income and consumption estimates from the two sources (40, p41).

He gives eight reasons why the World Bank’s poverty numbers from 1980 to 1998 are suspect, including a change in the methodology of calculating poverty in the 1990s and only recalculating back to 1987; the choice to use a US\$1-per-day international poverty line, which Wade calls artificial, instead of a measure that refers to the cost of a basket of goods such as food or other essentials; and that the information on the growth in China and India skews poverty numbers because the data from those countries are unreliable. China refused

to participate in the only two purchasing power parity (PPP) benchmarking exercises of the World Bank and India's data are based on extrapolations of 1985 data combined with "small, ad hoc price surveys in later years" (40, p41).

Calculating world income inequality faces similar difficulties. If looking at inequality in terms of market exchange rates, Wade concludes that, "world income distribution has been stable or widening for the past several decades" (40, p43). There are three possible ways of looking at inequality using PPP: 1. Ratio measurements (not the Gini coefficient) of richest to poorest decile show that PPP-adjusted income distribution has become much more unequal therefore, "world polarization has increased unambiguously;" 2. Using a measurement of the entire distribution and weighting countries equally (China=Uganda), "inequality between countries' average PPP-adjusted income has also increased since at least 1980;" 3. Using a measurement of the entire distribution and weighting countries by population shows that, "inequality between the country averages has been constant or falling since around 1980" (40, p46). Economists and the World Bank are understandably eager to promote the final measurement method, but it cannot be overlooked that two out of these three measures show world inequality widening or rising since 1980.

Wade brings the confusion back into perspective with the following reflection:

For all the earlier caveats about the statistics, we can be confident in saying that roughly 85 per cent of world income (measured at market exchange rates) goes to 20 per cent of the world's population, 6 per cent to 60 per cent of the world's population. Can this meet any plausible test of distributive justice? (40, p50)

He makes another conclusion that although globalization policies are invoked with growth-enhancing claims, if countries' per capita incomes are grouped by quintiles, most countries have not moved out of their quintile ranking, and this requires explanation (40).

Although it would be impossible here to complete an in-depth review of the history of developed countries' rise to wealth, Labonte (6) makes some important points that should

be highlighted. Of concern are the historical steps taken by developed countries to attain their positions of economic power versus what is being prescribed to poorer nations currently that speaks to the likely ability of those countries to change their economic (and ultimately social) situations. Citing development economist, Ha-Joon Chang, Labonte argues that the current supposed globalization success stories (the Asian ‘tigers’ of Taiwan, South Korea, Hong Kong, and Singapore along with Japan and the rest of China) “grew behind walls of import protection for their domestic producers, subsidies for their exporters and strict controls over banking and investment,” and only liberalized trade when they became richer, which mirrors the formula for success that Europe and North America followed earlier (6, p19). This process is contradictory to the current globalization mantra that ‘liberalization will create growth and wealth for all.’ Chang further claims that refusing to allow low- and middle-income countries the same protections that brought success to other countries is equivalent to “kicking away the ladder” (41).

While many seeking to confirm or refute the successes (or failures) of globalization do so on a globally comparative basis (as seen above), local level outcomes speak to the lived experiences of real people. Looking at the effect of globalization from this perspective is valid given that many countries have experienced common events on a local level that can be tied specifically to privatization, liberalization and shrinking-the-state policies (42,43). These experiences are reflected in both health and migration. In terms of health, the effects most relevant to this study are: health and education services that become out of reach for the poor due to implementation of user fees, the quality of care left available for the poor, increased food prices and lower household incomes (44). In addition, there are concerns about the environment created by globalization’s policies that contribute to migration, the phenomenon of concern in this study. Massive unemployment due to widespread privatization (45), low wages, and the poverty that accompanies these

conditions create an unfavourable internal environment, making the situation ripe for migration, a favoured option to mitigate negative economic and social conditions. This response is most often a function of “disparities in income and opportunities between countries,” such inequality being its “most fundamental cause” (46, p23).

## **2.2 Globalization and Health**

Current research that attempts to understand health in a broad context, called population health, “focuses on interrelated conditions and factors that influence the health of populations over the life course, identifies systematic variations in their patterns of occurrence, and applies the resulting knowledge to develop and implement policies and actions to improve the health and well being of those populations” (47, p380). Health from this perspective requires locating analysis in the broader contexts of politics and economics, and conducting research that involves “real people” (48, p395). Health Canada’s philosophy adopts a population health approach:

Health is a capacity or resource rather than a state, a definition which corresponds more to the notion of being able to pursue one's goals, to acquire skills and education, and to grow. This broader notion of health recognizes the range of social, economic and physical environmental factors that contribute to health. The best articulation of this concept of health is the capacity of people to adapt to, respond to, or control life's challenges and changes (49).

Both Health Canada (50) and the WHO (51) list factors, or determinants, that influence a person’s ability to access optimal health. They are: income and social status, social support networks, education, employment and working conditions, physical environments, biology and genetics, personal health practices and coping skills, healthy child development, health services, gender, and culture. In this study, examining health will include taking into account any or all of these factors where they are relevant, as well as remarking on any disease or infirmity where present and associated with the determinants of health.

Placing an emphasis on health in relation to globalization is critical. The Commission on Macroeconomics and Health has pointed out that while improved health is one desired outcome of economic development, it is also an essential element to achieving development goals and poverty reduction (52); in other words, it is the means to its own end. There is evidence that some aspects of globalization, specifically economic globalization, affect health negatively (31,53,54). Some specific health issues connected to globalization are rising income inequality (both within and between countries); declines in social services; the negative effects of international trade agreements such as TRIPS (Agreement on Trade-Related Aspects of Intellectual Property Rights) and GATS (the General Agreement on Trade in Services) on health equity; and increasing gender inequality (16,54-57).

The United Nations Development Programme's 1999 *Human Development Report* outlines the increasing income inequalities both within and among countries (55). Although World Bank economists Dollar and Kraay claim that globalization's fundamental (and neo-liberal) tenet of market liberalization raises incomes equally for the poor as well as for the rich, they neither discuss how the absolute inequality gap can quickly and exponentially widen nor the potential resulting consequences (58). For example, the same 10% increase on incomes of \$1,000 and \$100,000 takes an original gap of \$99,000 and increases it to \$108,900 (26). Wilkinson finds there to be a high correlation between relative deprivation and poor health (59), therefore as the income gap widens and with fewer people holding more and more of the global share of wealth, those not enjoying the benefits of gains will find their health deteriorating. Some specific examples Wilkinson gives of poor health effects resulting from wide income gaps are lower levels of trust and strength of community life (both of which are health protective), and higher rates of violence, homicide and hostility (59). Coburn takes one step back to place neoliberalism as the underlying factor of



income inequality, low social cohesion and subsequent health inequalities between rich and poor (54).

Looking at patterns of inequality can be one way to evaluate whether globalization is improving the world, but health outcomes can be another indicator of whether circumstances are improving or worsening worldwide (especially in light of Dollar's claim that globalization [market liberalization] leads to growth, which leads to wealth, which leads to better health). Kasturi Sen notes that, "improvements in global health status, as measured by gains in life expectancy and the reduction in preventable deaths, have been accompanied by a widening health and poverty gap between and within countries" (60, p581). These health improvements have been taking place approximately over the last 150 years, and are due to "increasing incomes, which improve diet and living conditions, improvements in public health measures, such as potable water and sanitation, and the diffusion of medical innovations, notably immunization and antibiotics" (6, p7). However, as Labonte summarizes, health reversals are now taking place that are not due to war. The HIV/AIDS pandemic, disproportionately affecting the poor in Africa, Asia, and parts of Latin America, is cited as the most important cause of this trend and is accompanied by other infectious diseases (6). The collapse of the health and welfare infrastructure in the former Soviet Union is also cited as precipitating one of the most rapid declines in life expectancy and rise in poverty that the world has witnessed (6). Some other disturbing trends are that of the 10 million children in low- and middle-income countries dying under the age of five, 370,000 are dying due to HIV/AIDS related conditions, whereas 4.4 million of these deaths are attributable to lower respiratory diseases, diarrhoeal disease, and malaria – "all of them predominantly diseases of poverty" (6, p7), and all listed as main causes of avoidable deaths in low-income countries by the Commission on Macroeconomics and Health (52). Labonte also mentions the double, triple, and even quadruple burden of

disease faced by those in low- and middle-income countries that is due to the “rapid transition to patterns of production and consumption more typical of high-income nations [that] increases their exposure to industrial pollution and to risk factors for cardiovascular disease, cancer and diabetes” and “because of special challenges presented by rapid increases in injuries and by HIV/AIDS” (6, p7-8).

The functions of the relationship between SAPs/PRs and health, and whether the effects of policies that result from these programs are positive or negative have been widely examined. As mentioned previously, the conditions of SAPs and PRs “generally entail severe reductions in government spending and employment, higher interest rates, currency devaluation (generally only a condition of SAPs), lower real wages, sale of government enterprises, reduced tariffs, and liberalization of foreign investment regulations”(61). The result of SAPs/PRs at the local level is most often increased unemployment and decreased government services along with tightened credit requirements and higher interest rates (61). In addition, there are often changes in the tax system which disproportionately affect lower income groups (61). One way these policies influence health directly is by increasing poverty and economic insecurity, which have multiple effects on exposure and vulnerability through such mechanisms as housing, working conditions, and access to nutrition and education (62). Also, reductions in government expenditures in particular result in the necessity of user fees as a cost recovery measure, especially in health services and education, creating health-related inequities (62).

Evaluating the effects of SAPs on health is a common topic for publication. A broad review of 76 published critiques addressing SAPs and health outcomes found 45 percent of them giving negative appraisals, while the remaining 55 percent were split between positive (8%), neutral (20%), and both positive and negative (27%) (44). The overwhelming prevalence of negative evaluations of SAPs and health outcomes compared

to other types of assessments was explained by an overrepresentation of studies on Africa, the majority of which were negative no matter if the article was normative, theoretical, or empirical (44). In addition, the authors found that case studies seemed to reveal more negative outcomes compared to cross country studies (44). This has important significance for researching the human face of globalization: case studies and more participatory types of assessments are better at revealing the human consequences of SAP (and PRS) policies (62).

International trade agreements are part of the globalization package and two in particular, TRIPS and GATS, have significant implications for health. The Agreement on Trade-Related Aspects of Intellectual Property Rights extends patent protection on all new products and technologies (16), which “makes access to essential life-saving drugs impossible for low-income countries, regardless of their level of health expenditure” (56). The General Agreement on Trade in Services “locks in existing privatization levels in countries whose governments commit service sectors under its ‘progressive liberalization’ requirements, making it difficult for governments to extend public provision in the future” (16, p15). Other agreements under the WTO that have implications for health include the Agreement on Agriculture (AoA), the Agreement on Sanitary and Phytosanitary Measures (SPS), and The Agreement on Technical Barriers to Trade (TBT). Under the AoA all export subsidies in agriculture are to be phased out by 2013, however continued US, EU, and Japanese export and producer subsidies in agriculture and food production which hinder trade-related growth and poverty reduction in developing countries are currently still allowed (63). The SPS limits health regulations that may affect trade in agricultural goods (63). An excellent example of the implications of this agreement is the EU’s ban on foreign beef with artificial growth hormones, citing possible carcinogenic effects. The US and Canada challenged this ban under the SPS and the WTO ruled that the onus was on the

EU to prove the beef was unsafe rather than on the two challenging countries to prove that it was safe (63). The TBT requires that regulations on goods undertaken for reasons of security, health, or environmental protection not create any unnecessary obstacles to international trade (64). Freedom to make public health policy is compromised under this agreement since all new health and environmental regulations are now routinely scrutinized against the TBT (64).

Women's health is of particular concern in these relationships. Income inequality, declines in social services, and international trade agreements all have particular significance for women since relative inequalities often affect them more negatively than they do men. Bradshaw reports that in households headed by men, those men consume a proportionately larger amount of household resources such as food and income in reserve to spend on themselves and only contribute half of their income toward family expenditures on food, clothing, etc., while in households headed by women, those women contribute their whole income to the household (17). Overall, households headed by women have less income than households headed by men because women earn less than men (17). Chavez Metoyer finds that women are increasingly concentrated in the overcrowded informal sector in an effort to mediate the effects of high unemployment; that as a result of cutbacks in social services, the workload for women is greater; that user fees for education and health services intensify structural discrimination against investment in female human resources; that currency devaluation increases the incentives on cash crops which require working capital and significant land area – resources that men tend to dominate (18). Loss of state-provided or state subsidized social services shifts the cost to the household level which women are traditionally responsible for managing (19). Women are thus shouldering a greater and greater share of work, yet, as noted above, do not always garner remuneration for such contributions.

De Vogli and Birbeck explore five causal pathways, which are conditionalities built into SAPs and PRSs and required at the national level (currency devaluation, privatization, financial and trade liberalization, health service user fees, and education user fees), for their impact on women's and children's increasing vulnerabilities to HIV. (20). While their focus is on these policies in Sub-Saharan Africa, their conclusions could apply more generally to other health outcomes for women as well. They find that currency devaluation and privatization cause rising prices and reduced opportunities for paid employment, thereby reducing access to basic needs. Financial and trade liberalization often causes increased internal migration to urban areas which also may reduce women's access to basic needs. In addition, women may be more exposed to risky consensual sex with male partners (who commute) or commercial sex and sexual abuse through reduction in access to their basic needs. User fees for health services reduce women's and youth's access to HIV services such as prevention, education, and treatments (in addition to services required for other illnesses). User fees for education reduce the capacity for women (especially girls) to recognize AIDS as a threat and also increase the risk for sexual abuse and therefore work in the commercial sex trade later in life.

With international trade agreements affecting access to health care and other services essential to health, women are disproportionately affected since they are poorer than men in most parts of the world, including Nicaragua (17), and more is required of them in their role as care-givers (16). Some other documented health issues that women face as a result of inequalities in Nicaragua include poor quality and insecure jobs and weakened social support systems of the 40,000 women working in 25 export processing

zones (EPZs<sup>1</sup>) (21,22), increasing pesticide exposure for women agricultural workers (23), early pregnancy (24), and domestic violence (25).

### **2.3 Globalization and Migration**

Stalker cites some common features and patterns of migration as poverty, adventure, calculation, and desperation (46) while the International Organization for Migration (IOM) cites a mix of economic, political, and environmental reasons for migration in Central America (65). Stalker declares the disparity in income and opportunity between different countries to be “the most fundamental cause” of international migration and the IOM echoes this by saying that the most common motive for Central American migration is people looking for better political and economic conditions (46, p23;65). This would certainly be the case in Nicaragua where the average monthly household income US\$100, whereas in Costa Rica it is approximately US\$395. Un- and underemployment combined in Nicaragua is 60 percent (12,13) ; in Costa Rica it is 14.6 percent (66).

A number of models have been proposed to explain international migration. These models can be categorized into one of two points of view: those that see migration as an individual or household level decision (neoclassical economic theory and the new economics of migration), or those that see migration within larger structural conditions (dual labour market theory and world-systems theory). Neoclassical economic theory focuses on the differences in supply and demand for labour in sending and receiving countries, and predicts that workers will migrate toward higher wages (67). The new economics of migration sees households making a decision as a group to send one or more

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<sup>1</sup> EPZs are geographically defined industrial areas in a territory or country that specialize in manufacturing for export. Firms operating in the EPZ are usually offered financial incentives such as exemption from taxation, duty free imports of inputs (machinery, equipment, raw materials), and in some cases, waivers to the application of national employment laws.

members elsewhere to work as a strategy to increase income as well as economic security (67). The dual labour market theory argues that national capitalist economies create 'inferior' jobs and working conditions through the necessity of flexibility in order to maintain profitability (67). Nationals, many of whom may be highly educated, are often unwilling to accept these conditions, whereas immigrants are often less picky and take what they can get (67). World-systems theory puts all of the other models together into a description of flows of capital, goods, and labour (67). These flows see the economies of rich countries exploiting and destroying poor countries' economies in terms of traditional sources of income (67). The result creates a mobile labour pool, many of whom will migrate internationally.

The structural models presented here are more comprehensive in taking into account the multiple factors contributing to migration. While individual level theories propose that the long-term effects of globalization will eventually diminish the causes of migration through converging economies or the improvements in poor countries that reduce disparities (67), previous discussions of globalization's effects on inequality make those arguments seem unlikely. The social and economic environment often created within countries by globalization seems more likely to continue to stimulate international migration. As Stalker notes, "in a world of winners and losers, the losers do not simply disappear, they seek somewhere else to go" (67, p140).

## **2.4 Migration and Health**

International migration means uprooting away from family and familiar contexts and relocating in an unfamiliar, possibly new cultural and social situation (68). Migrants may have little job security or legal protections and they are often subjected to discrimination and prejudice (68). The process of migration can be very stressful,

depending on the context, and these stressors can have important consequences for mental health. Common feelings throughout the experience of migration that contribute to poor mental health include: powerlessness (i.e. limited options that force migration), loss of social support networks resulting in bereavement, culture shock, anxiety, confusion, anger, and feelings of deprivation (69). There is currently a lack of information about what can and should be done to manage mental health issues related to migration; the psychosocial health of migrants remains poorly studied and poorly addressed (68).

Whether voluntary or forced, migration for reasons of desperation has significant health consequences for women. Pyle lists three sectors connected to globalization where women are the dominant workers and are often required to migrate: the sex trade, paid domestic service, and EPZs (70). Pyle makes the connections among the domestic conditions of SAPs on women (austerity measures falling more heavily on them), countries' orientation toward market liberalization (a rise in EPZs, a market for sex, and domestic work), and the crisis of women trying to "stem the fall in their family's standard of living" all of which act as 'push' factors for women to enter these three sectors (70). Specific health concerns associated both with these types of employment and the migration that often goes with it are low wages, no benefits, long hours, harassment, lack of rights in workplaces, abuse, great risk of contracting STIs (specifically HIV/AIDS), isolation, poor living conditions, constant economic vulnerability, and inadequate or non-existent access to medical services (70).

### **2.5 Summary: Globalization, Health, and Migration**

The relationships among globalization, health and migration and how they affect people's lives are filtered through many levels and contexts. Above all, it is important to locate migration within its economic context at both global and national levels. Cultural



context and its gendered components also cannot be ignored. The policies of neoliberal economics imposed through SAPs and PRSs are decided upon at a global level, but are set in motion in national contexts, which work through various mechanisms to produce household level effects. An increasing number of people are on the losing end of inequalities created in these scenarios, which lead to both health and migration consequences. The inability to compensate for these inequalities within the national context, and multiple examples of success outside the borders often leads many to migrate internationally. The act of migration has implications for physical and mental health for both migrants and suggests implications for their families who stay at home. Many of these implications are culturally grounded. Outcomes for women are of particular concern since relative inequalities often affect them more negatively than they do men.

## **2.6 Nicaragua**

Nicaragua provides an excellent case example of the convergence of globalization and migration, and is therefore a key location to study their relationship with women's health. Nicaragua began the process of global economic integration in 1990. The percentage of the population living in poverty decreased from 50.3% in 1993 to 47.9% in 1998 (71), however, the absolute number of people living below the poverty line grew by 240,000 in those five years (72). That number grew again between 1998 and 2001 by another 160,077 people (73). Between 1995 and 2004, there was a 25% population growth (4.35 million to 5.48 million) (74,75). There have been accompanying high rates of un- and underemployment. Problems with data reliability make it difficult to say with certainty what exactly those rates are. Between 1993 and 1998 official figures from the Ministry of Labour (MITRAB) show combined rates of un- and underemployment declining from approximately 31% to 25% (76). Between 1998 and 2001 the same rates hovered around

23% (76). The Nicaraguan Central Bank, however, shows unemployment between 1993 and 1998 at about 50% with slight variability during those years (77). In addition to differing figures, another example of the unreliability of data is from 1997. For that year the National Institute of Statistics and Census (INEC) used data from MITRAB to report unemployment at 14.3% and underemployment at 12.2%, yet an official MITRAB publication has unemployment at 12.4% and underemployment at 39.5% (76,77). Also, a strange jump in underemployment is seen in INEC data between 2001 and 2002 from 12.4% to 35.4%, suggesting either faulty data or an inability of the system to accurately collect information prior to 2002 (12). Apart from these considerable data problems, the accurate estimate of unemployment is dubiously reflected due to the method of calculation. The unemployment rate is calculated using the percentage of the 'economically active population' (those of working age who are working or actively searching for a job) who cannot find work (78). People who are not actively searching for a job because they think they won't find one or they are tired of looking are excluded by definition from the unemployment rate.

Nicaragua is the second poorest country in Latin America (only Haiti is poorer) (79) and the conditions do not seem to be improving (80). As mentioned, un- and underemployment figures vary, but in 2002 (the most recent year for which data are available) were reported to be around 60% combined (12,13). The Nicaraguan Government, commenting on poverty and underemployment, has observed, "This suggests that it is not enough to be employed to avoid poverty" (65). Links between rising unemployment in Nicaragua and globalization macroeconomic policies have been established by Barahona (81), CRIES (*Coordinadora Regional de Investigaciones Económicas y Sociales*) (76) and by the IOM (65).

### 2.6.1 History

For a full understanding of Nicaragua's current conditions, they must be placed in their proper historical context. The country's political, economic and environmental history places it in a disadvantaged position in relation to the forces of economic globalization. Some examples from Nicaragua's political history show that it has long been subjected to outside interference, especially from the United States, with disastrous results in terms of Nicaragua being able to dictate its own political and economic future.

An early example of US intervention in Nicaragua is the story of William Walker, a failed doctor and lawyer from Tennessee. In the mid-1800's, the US attempted to establish control in the country to capitalize on a possible inter-oceanic shortcut (82). Arriving in 1855, Walker set up a coalition government under the Conservatives, but soon declared himself president of Nicaragua (82). Walker changed the official language to English, legalized slavery, and wanted to annex the country to the US as a new slave state (83). War ensued and Walker was rescued by the US in a negotiated truce in 1857, but came back in 1860 only to be captured and put to death by a Honduran firing squad (83).

Dictator rule by the Somoza dynasty began in 1936 and was sanctioned by the US (83). Franklin Delano Roosevelt famously once remarked that, "Somoza might be an S.O.B, but he is our S.O.B." (83). The family maintained a tradition of allying with the US and making the family rich at the expense of Nicaraguan citizens until 1979, when the Sandinista revolution took control after a year and a half of difficult struggle (82,83).

The Sandinista revolution is an important era in Nicaragua's history. The Sandinistas took their name from Augusto C. Sandino, a nationalist and anti-imperialist who led a popular guerrilla uprising in the late 1920s and early 30s against the US supported government and its forces in the country (83). The revolutionary group's theoretical basis for governing, called Sandinismo, was a mixture of both Marxist-Leninist thinking and a

branch of Catholic thinking, often referred to as liberation theology (83). Nicaragua, under Sandinista rule, was supported by Cuba and the Soviet Union (82). The United States, under Jimmy Carter, was originally modestly supportive (Sandinista leaders were invited to the White House, US\$8 million in emergency funds and a US\$75 million aid package were approved); however Ronald Reagan won the White House in 1980 and considered the Sandinistas a Marxist presence in Nicaragua (82). Out of a fear that the experience of Cuba would be repeated in Nicaragua (in addition to Sandinismo being the opposite of a neoliberal thinking government in the US), Washington began a campaign to undermine the Sandinista government and refused to give up until it defeated its enemy (82).

Soon after winning one war, Nicaraguans were subjected to another as US-funded 'contras' began to wage guerilla warfare. While the US congress felt that such direct intervention was not appropriate, the Reagan administration covertly bypassed their directive and sold arms to Iran in exchange for US hostage releases and diverted the funds to continue supporting the contras (83). The scandal broke in 1986. Unable to both fight the contras (who had unlimited funding from the US) and run the government on a limited amount of income, and combined with the fall of communism in the USSR, the Sandinistas had to admit defeat. Besides, many of the gains the Sandinistas had made in the early 80's (illiteracy was reduced to 12% by 1983; life expectancy increased by 5 years; infant diarrhea, mountain leprosy, and malaria were down 75%, 60%, and 50%, respectively; infant mortality decreased from 121/1000 in 1978 to 90.1/1000 in 1983) were overshadowed by spectacular economic failures (inflation reached 33,000 percent in 1988) that were combined problems of a socialist-oriented government fighting a voracious budget-consuming war (82-84).

Even though the majority of Nicaraguans supported the Sandinistas, they were also war weary and besieged by an economic blockade from the US (83). It was in this climate

that Violeta Barrios de Chamorro was unexpectedly elected president in February of 1990 in a peaceful, democratic change of power away from the revolutionary government. The transition ushered in sweeping economic changes, marked by the neoliberal economic policies of market liberalization and privatization (83). Some characteristically neoliberal policies had already been put into place by the Sandinistas before the 1990 election in an effort to gain control over the economy, but those of Chamorro “pummeled the poor majority” (83). An original bail-out by USAID in 1990 changed into a Stand-by Agreement from the IMF for US\$58.4 million in 1991, and two more packages (in 1994 for US\$173 million, and in 1998 for US\$136 million) were made under the IMF’s Enhanced Structural Adjustment Facility (85). Government was downsized, social services were cut back, state enterprises were privatized, credit emphasis was placed on agro-exports instead of peasant production of domestic foodstuffs, and unemployment, underemployment, drug addiction, crime rates, homelessness, and domestic violence soared (65). Many of these policy changes deeply impacted health outcomes given that they reversed the policies of the Sandinistas. The two most directly related to health included ceasing of state funded health care and prescription medication, and a nation-wide literacy program (84).

The succeeding government of Arnaldo Alemán (elected in 1996), while also following neoliberal policies, was marked by corruption, further impoverishing the country. Alemán was convicted and sentenced to 20 years in prison in December 2003 for embezzling US\$100 million in government funds, much of it from the international donor community earmarked for Hurricane Mitch relief (see below) (86). While he was originally permitted to serve his term at his ranch, he was returned to prison in March 2004 (86). Enrique Bolaños, elected in 2001, has been vocal about fighting corruption, even meriting a document from the 2004 G8 Sea Island Summit outlining Nicaragua’s intention to work with that organization on a transparency and anti-corruption project (87). Bolaños has

continued with the IMF program in its new iteration, signing a new loan agreement in 2002 for US\$129 million, and securing debt reduction of approximately 73% under the Highly Indebted Poor Countries initiative (HIPC) (88,89). Most recently, Nicaragua has qualified for 100% elimination of multilateral debt under the IMF's Multilateral Debt Reduction Initiative; however, this program still leaves in place debt incurred with the IMF after 2004, WB debts incurred after 2003, debts to the Interamerican Development Bank, and commercial debt (90).

The environmental history of Nicaragua has added to its woes. Much of Managua, which lies on a geological fault line, was destroyed by an earthquake in 1972 and has never been rebuilt, perhaps partly due to Anastasio Somoza Debayle's diversion of relief funds to his own pockets (83). In 1998 hurricane Mitch, the fourth most powerful Atlantic hurricane of the twentieth century (18), devastated homes, agriculture, and infrastructure. Losses included 3,332 Nicaraguans killed or missing and US\$1.5 billion in damages (18). The UN High Commission on Human Rights condemned President Alemán for initially refusing to declare a state of emergency (91).

### **2.6.2 Nicaraguan Migration**

It is within this economic and social environment (including cultural context) that we examine migration. The IOM specifically ties Nicaraguan employment-seeking migration to Costa Rica to the global 'free market' in labour.

For the Nicaraguan unemployed and poorly paid, Costa Rica presents appealing working alternatives, it is an accessible country and has better living standards than Nicaragua, and has a clear, explicit demand for workers. Nicaragua, then, drives its population out as a result of the macroeconomic measures imposed, which have brought about a significant social exclusion. Meanwhile, Costa Rica attracts labour force for businesses requiring workers whose aspirations are increasingly uncommon among Costa Ricans. In this regard, it may be stated that the migration of this population is subject to the laws of supply and demand for workforce in the new context of globalization (65, p9).

### **2.6.2.a Magnitude**

Many Nicaraguans opt to migrate to find work and for a large proportion of the population, the destination is Costa Rica (14,65,81,92). The IOM estimates approximately 300,000 to 340,000 Nicaraguan immigrants live (either regularly or irregularly) in Costa Rica (65). Elton reports on a 1999 FLACSO (*Facultad Latinoamérica de Ciencias Sociales*) study that claims out of every 10 Nicaraguans who emigrate, 7 go to Costa Rica (14). The scale on which this migration is taking place has considerably increased (over 400%) since the beginning of the IMF program in Nicaragua in 1991 (15).

### **2.6.2.b Characteristics of Migrants**

Women outnumber men migrants by slightly more than half (50.9% compared to 49.1%) and just over 75% of all migrants are of working age (13-49) (65). The average years of schooling of Nicaraguan migrants is 5.4 years (65).

Barahona reports emigration coming from all sectors of Nicaragua (81). The IOM finds permanent immigrants from:

homes and communities lacking the capacity of self-sustenance, at least in terms of production for self-consumption; the Nicaraguan ‘dry zone;’ and towns created around the extensive banana enclaves and agricultural products for export – mainly cotton – which have failed to recover from the lack of dynamism affecting agriculture, cattle, mining, and fishing (65, p9).

In practical terms, this lack of dynamism means that small- and medium-scale producers have almost no access to credit due to financial reforms required by SAP conditions, where banks make mostly short-term loans (up to 6 months) to large-scale producers because they are the only projects judged to be “truly profitable” (85). In addition, as part of the 1998 IMF loan, the National Development Bank (BANADES, whose function was to assist producers not covered by private financial groups), was closed, further restricting access to

credit for small- and medium-scale producers who make up the majority of the agricultural sector (85).

Additional immigrants from Nicaragua in Costa Rica are from urban and rural households “with a history of both internal and external migration, whose main providers have been underemployed or unemployed for several consecutive months, or whose local jobs have been historically associated to seasonal travels due to port dynamics; from households located in territories along the border with a migration dynamic ‘of its own’” (65, p9). Jones finds that one of the main reasons for Nicaraguans leaving their home country is to search for better socioeconomic opportunities and that once they reach Costa Rica, the majority find employment in three main areas: banana production, the construction industry, and domestic services (92).

#### **2.6.2.c Remittances**

Nicaraguans who stay in Nicaragua rely heavily on the remittances coming from Costa Rica. Jones reports that in 2000, 75% of remittances sent back to Nicaragua were used for basic subsistence needs (92). In 2002, remittances were 29 percent of Nicaragua’s GDP (although the data is not disaggregated by source) (93). Remittances from male migrants are lower on average than remittances from female migrants (81), an important gendered difference considering that women earn less than men on average in Costa Rica (65). Remittances are used for basic consumption such as food, education, and health needs, leading to the question of how a family provides these things without remittances (81); and women are responsible for managing household and income when left alone to care for their families.



#### **2.6.2.d Migration and Women's Health**

A 2001 study of Nicaraguan female emigrant labourers in Costa Rica found that those who crossed the border using the services of a *coyote* (a person who makes a living in getting people across the border illegally), rather than going with a close relative, were usually expected to pay in both cash and 'in kind' sexual favours (81). A specific danger faced by young women and girls along the border is trafficking. Organizers of trafficking rings, also known as 'coyotes,' lure victims with promises of going to an art academy in Mexico to become models or artists, or are promised waitress jobs (94). While the girls usually begin with legal documents and a job for about a month, when the 30-day term runs out, they are again illegal and at the mercy of their benefactors who force them into prostitution (94).

For women migrants, the jobs available in Costa Rica are predominantly in domestic service (80 percent) (81). Many women are vulnerable to overwork and underpay in these positions because the work is invisible to the public and because the Nicaraguan women are unaware of their rights in terms of maximum hours in a workday and minimum wages (81,94). In addition, their (usually) illegal status prevents them from complaining to the authorities about abuses. Many report being virtual shut-ins since they usually live in the house of their employer and do not venture out often due to the fear of being caught by migration authorities. Frequently employers suggest that women work their day off for pay since they don't have proper papers and worry about being caught (81).

Families are split up by migration and more children in Nicaragua are being cared for by people other than their own parents (most often other women, such as grandmothers or aunts) than are being cared for by parents (this points to both gender and age burdens) (81). Part of this is due to the fact that men feel an inability to be responsible

for children and leave women with the majority of the burden of care (81). Women migrants are “profoundly insecure, precisely because they have left behind their family, they suffer because of this separation, and in many cases, upon their return, they must assume the burden of a broken family, both materially and morally, especially with regard to the sons and daughters, because the mothers had been separated” (94, p18).

For women who stay, poverty is a problem. Ninety percent of the population under 25 years of age live in poverty (94), and women account for approximately 63 percent of the population under age 25 (95). Of the poorest households in 1999, 38.8 percent had female heads of households (94). Forty-six percent of female-headed households have problems legalizing their landholdings, which prevents them from accessing credit (94). The negative effects of poverty on women are compounded by inequalities due to gender status and their subordinate position within the family (94).

### **2.6.3 The Cultural Context**

Analyses of economics and cultural influences on approaching social phenomena are often kept distinct and separate, however this is a false dichotomy since especially gendered phenomena (which are aspects of culture) “must be located within an economic context” (11, p113). Understandings of culture have encompassed various types of definitions: descriptive (ideas and activities), historical (a heritage passed down), normative (behavior, action and values), psychological (a problem-solving device), structural (an abstraction different from concrete behaviour), and genetic (not biological, but a product of generational diffusion) (96). Culture however, is difficult to define and indeed intent to do so has caused academic uproar (97,98). More currently, writing on culture has centered on recognizing that culture is more than simply ‘an entire way of life.’ It is a “patterned sphere

of beliefs, values, symbols, signs, and discourses;” more than just a reflection of underlying economic forces, power distributions, or social-structural needs, value-neutral (96, p4-5).

Globalization, in the form of neoliberalism, creates conditions that can be harmful to women’s health. These conditions have particular significance in Latin America, and specifically Nicaragua due to the cultural context. Although the purpose here is not to incorporate a full anthropological rendering of Nicaraguan culture, it is important to include relevant understandings of women’s roles and place in society.

Power relationships are what most define women’s positions in Nicaragua. Men hold power over women in the form of *machismo*, which is also expressed in economic terms. Until the Sandinistas took power in 1979, marriage required women to submit to her husband’s decisions and a woman could only divorce her husband if she could show his infidelity was public or scandalous (whereas a man could divorce his wife only on suspicion of adultery) (19). State law permitted only women to be convicted of adultery (a criminal charge carrying a two-year penalty), women had no rights to children born out of wedlock (important for women as civil or church marriages are rare), and battered women had only divorce as a recourse for protection (19). The Sandinista revolution saw women forming up to one-third of combat troops, sparking hopes of a permanent transformation of gender relations (99). The Sandinistas also brought in many policy changes in an attempt to formalize a commitment to gender equity. Women were not allowed to be used as sex objects in the media; procedures were established to investigate the paternity of illegitimate children; single women were allowed to adopt; part of the promotion of breast-feeding outlawed the advertisement of powdered formula; women’s and men’s rights were equalized in terms of wages and land tenure and; some women were made governmental ministers (99).

Unfortunately, these policy transformations did not fundamentally alter gender power relations, exhibiting a trait Whisnant calls “cultural recalcitrance” (99, p385). It manifests itself

through the durability of assumptions, values, behaviours, social and cultural norms; in the lack of congruence between emerging progressive ideology or policy and established social or cultural practice; in passive or active resistance to new policy, new institutional forms, or initiatives for change; and in the conscious, programmatic recovery, reinforcement, and reassertion of the old gender paradigms (99, p385).

*Machismo* and institutions such as the Catholic church help(ed) to maintain hegemony and play a large role in explaining this trait (99). *Machismo*, a deeply entrenched understanding of male and female characteristics in Nicaragua (as elsewhere in Latin America), requires binary understandings of sexuality: men have sexual superiority, liberty, are aggressive and dominate, whereas women are pure, inferior, passive and submissive (99). *Machismo* dictates how men construct women and how they relate to each other. Women are one of: an intensely sexual being, eager to be dominated; a liberated, but masculinized woman; or an unthreatening submissive virgin, wife, or mother (99). Men who do not follow this paradigm lose both their power and their masculinity (99). Fear of this loss is a powerful motivator for men to maintain their hegemonic position (99). Perceptions of women by the Catholic church also reinforce *machismo*. The Church finds a woman’s worth in her role principally as a mother, which should only take place within marriage (99).

These attitudes are consistently reproduced in the home and socialized at school and among friends (99). A recent study on the sexual culture in Nicaragua reaffirmed the widespread prevalence of *machismo* and discussed its effects in common experiences (100). It was reported that sexuality is experienced as distinctly separate from emotional intimacy, which is not shared in terms of talking about sexual themes

with partners; couples are dysfunctional given that men control relationships and refuse vulnerability in intimacy; sexual partners become anxious or ambivalent under such conditions; this produces dissatisfaction and compulsiveness in sexual encounters; asymmetric gender socialization produces different expectations in relationships for men and women, resulting in disillusionment and a lack of love in relationships (100). When opportunities for women to develop their identities are lacking (for example through education, profession, or other status), it is common for them to become pregnant in adolescence to fulfill the identity void with a traditional role (100). There is also a strong link between sex and violence, especially when marital problems arise, which exemplifies the deep connection between power and sexuality for men (100). Violence against women is common and accepted as part of everyday life (101). These experiences and attitudes repress men's abilities to express healthy emotion, and, as a consequence, are commonly articulated as violence, and especially alcoholism. A state of drunkenness is the only time a man may cry, be sad or express his emotional vulnerability (100). All around, the combination of cultural rules creates sexual misery and "misery of the spirit" (100, p206).

These cultural norms are common throughout Nicaragua and operate within the economic context created by globalization. They create intense vulnerabilities for women due to their subjugated position and limited scope of acceptable roles in society.

## **2.7 Conclusion**

Nicaragua has been under SAP and PRS programs with the IMF since 1991. The conditionalities of these programs represent a sharp change from the national social and economic policies of the 1980s. The absolute numbers of people living in poverty have

grown and the situation of inequality has not significantly improved. These two conditions are among the most important determinants of health. The responsibility for the provision of social services has, in effect, shifted from the state to the household level where women are primarily responsible and unpaid for their work. This situation contributes to the reason that relative inequalities affect women more negatively than they do men. Pervasively high un- and underemployment levels also contribute to the poverty situation, which again makes women vulnerable since they are almost always poorer than men. Cultural norms for women also leave them vulnerable due to their subjugated and oppressed position in society.

The decision to migrate to Costa Rica in order to mitigate unfavorable economic conditions is an increasingly popular choice, with an over 400% increase in migration to that country since 1991. Current knowledge indicates that migration has significant consequences for women's health due to gendered vulnerabilities in crossing the border, working in Costa Rica, and family separation. Migration in general has important implications for both physical and mental health, the latter of which remains poorly studied and poorly addressed.

To date, there has been a lack of research examining women's experiences in their own words of how they understand and experience the impacts of migration in relationship to globalization. The goal of this study is to broaden the knowledge base of how globalization is interconnected with (and determines) social and economic factors by understanding better how women experience the health impacts of employment-seeking migration from Nicaragua to Costa Rica.

### 3. Methodology

#### **3.1 Introduction**

This chapter outlines the practical and theoretical elements of how I set out to answer the research questions. The contents include a description of how I set up my research site and gained access to participants; descriptions of the research site and participants; the theoretical and philosophical positions informing my methodology; a description of my research methods; and a discussion of the elements indicating quality and rigor in this type of research.

#### **3.2 Setting up the Site and Gaining Access to Participants**

I was able to connect with a Nicaraguan organization through some past experiences. In the summer of 2002, I participated in the University of Saskatchewan's pilot international health course with Professor Lori Hanson in Nicaragua. As part of that class, Lori coordinated a meeting for students with Maria Hamlin Zúniga, the Global Coordinator for the International People's Health Council. Maria is based in Nicaragua. She passed through Saskatchewan in October 2004 and met with me to discuss my thesis. She requested a two-page description, in Spanish, of what I wanted to do and why, and what I could contribute to an organization that would help me. She passed that document on to her friend, Martha Isabel Cranshaw, who is the director of the Nicaraguan Migration Network (*Red Nicaragüense de la Sociedad Civil para las Migraciones*, or just *Red*). The *Red* has local networks in seven locations throughout Nicaragua.

### 3.3 Site

The sites for my research project were two Nicaraguan communities: Estelí (Department of Estelí) and San Marcos (Department of Carazo). Departments are geographical designations, similar to provinces or states. Estelí is located in the north of the country while San Marcos is farther south near Jinotepe and Masaya (see Figure 1).



Figure 1. Map of Nicaragua

Both communities experience high levels of migration to Costa Rica. In Estelí, the local network is coordinated through a local volunteer and conducts monthly meetings. At the time of research, the volunteer was organizing a migrant committee made up of family members of migrants and former migrants. In San Marcos, the local network is coordinated through a national women's organization and periodically holds meetings about migration. I participated in the activities of the *Red* in both locations during the period of May to September 2005.



### **3.4 Participants**

The participants were 12 women who were interviewed (six from each community) and 15 additional women who participated in group activities as part of the data collection, for a grand total of 27 participants. The interviews were digitally recorded. The quality of one interview was severely compromised by background noise, making it impossible to use, leaving a sample of 11 interviews for the analysis. The group activities had more than 15 participants overall since some of the interviewed women also participated. Participants were selected based on two criteria: gender (women), and if they or a member of their family had migrated to Costa Rica for work. Sampling was purposeful with the aim to select information-rich cases that would allow for in-depth study (102,103). Sample size for interviews was chosen as the maximum number possible interviewed in the time available for the study. It allowed for collection of in-depth, rich information without being too large to interfere with detailed analysis (103-105).

The *Red* was involved in much of the planning and setting up of my study. All but one of the 12 interview participants were suggested to me by the *Red* based on their knowledge of and my need for information-rich cases, and all consented to participate (see section 2.6.1 for a description of the process of obtaining consent). One potential interviewee in Estelí was excluded because she arrived approximately an hour and fifteen minutes late for our scheduled interview time, about 15 minutes after I gave up waiting. I was unable to reschedule a convenient time with her for the interview. I encountered the one additional interview participant while accompanying students from the University of Saskatchewan's Nicaragua field school course, "Global Health: Selected Issues in Nicaragua," on a field trip to a small community near Estelí. The trip was hosted by a local community organization known to the *Red*, but not networked to it. My purpose on the trip was to accompany the students in place of the instructor who was with the other half of

the group in a different community, not necessarily to seek out participants. However, upon describing my primary purpose in the country and my study, the local leader of the organization suggested I speak with one of their members who had a family member in Costa Rica. A conversation with this woman revealed a rich source of information and she consented to be a participant. A large group of potential participants for the group activities were made aware of the activity through the *Red* one week in advance and in total 15 participants attended in addition to some interview participants.

In all, the *Red* suggested 12 potential interview participants to me, 11 of whom were interviewed, and an additional interviewee encountered outside of the *Red* made up all 12 interview participants. A total of 15 additional group activity participants volunteered their attendance at the activity.

I did not collect basic demographic data (age, education level, SES level) about the participants (although most of this information was revealed in the interview process) given that a targeted demographic for sampling was identified from the outset. I was able to learn more personal information from interview participants than from group activity participants due to the nature of the different circumstances. The main difference in interview participants between the two research sites was how participants experienced migration: in Estelí, most interviewees (but not all) were family members of migrants, and in San Marcos, all were returned migrants. Part of this might be explained by geography. San Marcos is much closer to the Costa Rica border, possibly making the migration process easier in comparison to *Estelianos* who have considerably farther to go and might not return as often. The interview process revealed information on the number of children each woman had. Younger participants had fewer children compared to older participants and there was virtually no difference between the two sites (17 children among 6 interviewees in Estelí, and 19 among 6 interviewees in San Marcos). The majority of the participants did not have

high levels of education, although, again, this information was revealed more in interviews than in the group activities. Among all participants, only three were illiterate. Only two indicated having studied beyond high school, but most did not reveal their highest grade completed. Of those who worked, their jobs were low-skill and low paying, for example in tobacco factories rolling cigars, making piñatas, or running tiny businesses out of their homes like restaurants or corner stores. Participants who had migrated previously had made multiple trips back and forth. Two indicated a desire to continue on this path. A more in-depth description of participants' contexts can be found in section 4.2

### **3.5 Methodological Framework**

Because of the interdisciplinary nature of this research, I approached the project using a qualitative methodology known as interpretive description. Interpretive description is inter-methodological in that it pulls together many different elements of qualitative methodologies in order to “discover and understand a phenomenon, a process, the perspectives and worldviews of the people involved, or a combination of these” (106, p6). It seeks out how people interpret their experiences; how they construct their worlds; and what meaning they attribute to their experiences. The overall purpose is to understand how people make sense of their lives and their experiences (107)

Some of the methodologies that influence interpretive description (ID) are grounded theory, phenomenology, and ethnography; however, these methodologies have additional purposes that go beyond understanding, which is the main focus of ID (107). For example, grounded theory seeks to build a definitive theory about the phenomenon of interest; phenomenology seeks to understand the “essence and underlying structure of the phenomenon” (107, p38); and ethnography seeks to understand how individuals interact

with each other in the culture of their societies (107). ID, in contrast, seeks only to understand, yielding valuable, rich, descriptive information, and a deeper comprehension of the phenomenon, process, or experiences of interest (106).

The epistemology on which ID rests is constructionism (106,107).

Constructionism, as it is understood in this research, assumes that “individuals construct reality in interaction with their social worlds” (107, p37). In other words, meaning and belief (about reality) are constructed by the mind and, by extension, are influenced by history, culture, and personal circumstances (108). This should be understood as distinct from other controversial positions such as radical constructionism that assert there is no truth or real world independent of our own thought (108). Constructionism in this study, “takes the position that “there is no objective truth waiting for us to discover it;” rather, truth “comes into existence in and out of our engagement with the realities in our world” (109, p8).

The theoretical perspective of ID, informed by its epistemology, is symbolic interactionism (107,109). Crotty indicates that this theoretical perspective “provides a context for the [research] process and grounds its logic and criteria” in addition to allowing for a statement of “the assumptions brought to the research task and reflected in the methodology as we understand and employ it” (109, p7). Herbert Blumer, who first coined the term ‘symbolic interactionism,’ explains that the theory rests on three premises: 1. Human beings act toward things on the basis of the meanings things have for them (110). This is of utmost importance to understanding people’s actions. To deny or ignore the meanings people give to things, which determines how they act toward them, would in effect produce a fraudulent study (110). 2. Logically, coming from constructionism, meaning is derived from socially interaction (110). 3. Meanings are managed and modified through an internal interpretive process (110). This interpretive process uses ““significant

symbols' - that is, language and other symbolic tools - that we humans share and through which we communicate" (109). The symbolic interaction takes place when we interpret the meaning of another's action (110). Reflex reactions are considered non-symbolic because they are not interpreted (110). A key requirement for symbolic interactions to take place (i.e. effective communication) is to put oneself in the place of the other (110). In sum, symbolic interactionism finds that people must be regarded in the context of their environment; they are inextricably linked (111). In addition, ideas and behaviours are constantly changing depending on how a person interprets the world (111).

Through symbolic interactions (dialogues, interviews and other interactions), I attempted to make meaning out of the stories I was told by my participants. I also researched the historical, political, economic, and social context of their worlds in order to further my understanding of their experiences. My own context cannot be ignored in this process, and is addressed in section 3.7.2.

Given that this study looks to understand how globalization affects social conditions at the local level and what this means to women who live these experiences in Nicaragua, ID is especially appropriate since it provides a "broad foundation for inquiry that respects the dialectic between the general and the particular, between commonality and individuality, between truth and perception, between theory and practice" (105, p171).

### **3.6 Methods**

I approached the research methods and analysis using the concepts in interpretive description as a guide. The *Red* suggested to me, without revealing any particular personal information, women who were good candidates for interviews and a group activity using popular education techniques. Through a general presentation of my project, potential

participants were offered the opportunity to decide to participate. Participants notified either me or the coordinator of each local network of their consent (see next section).

In addition to interviews and a group activity, I reviewed documents that established the terms of the globalization phenomena in Nicaragua, such as agreements under the Enhanced Structural Adjustment Facility (ESAF, the branch of the IMF that established and monitors conditionalities associated with loans or debt relief) and Poverty Reduction and Growth Facility (PRGF, which the IMF renamed its ESAF in 1999 to distance it from the growing critiques of ‘structural adjustment’), as well as relevant literature that documented the process and outcomes of these agreements. I also kept a journal throughout this entire time.

### **3.6.1 Obtaining Consent**

Prior to arriving in Nicaragua, I prepared a consent form approved by the University of Saskatchewan Behavioural Ethics Committee to present to participants. While the conditions of consent were clear on the form, I also reviewed it verbally with all participants, especially with those who were illiterate. Illiterate participants gave me verbal consent and made an X mark on the consent form indicating that it had been explained and they understood. One illiterate participant was able to sign her name. In all three cases where the participant was illiterate, a family member or friend was present during the explanation of the consent form to make sure it was well understood. It was explained that signing the form meant that they agreed to participate and could withdraw their participation in total or in part at any time, losing nothing in the process. Interview participants were allowed to choose a pseudonym in order to ensure confidentiality of their contributions. There was no need for this in the group activities since the resulting data was of a much less personal nature and in any case, non-identifiable. There were no

objections by any participant to signing the consent form. I feel strongly that they well understood the meaning of the consent form. Many interview participants declined to choose a pseudonym, with one even claiming that she wanted her story known by “*everyone in Canada.*” Some interview participants decided after the interview that some of what they shared should not be part of the data I used for analysis, and one decided after the fact to use a pseudonym. In keeping with the rights of participants, I respected their wishes. All participants were provided a personal copy of the consent form to keep. The consent form in English and Spanish can be found in Appendix A.

### **3.6.2 Interviews**

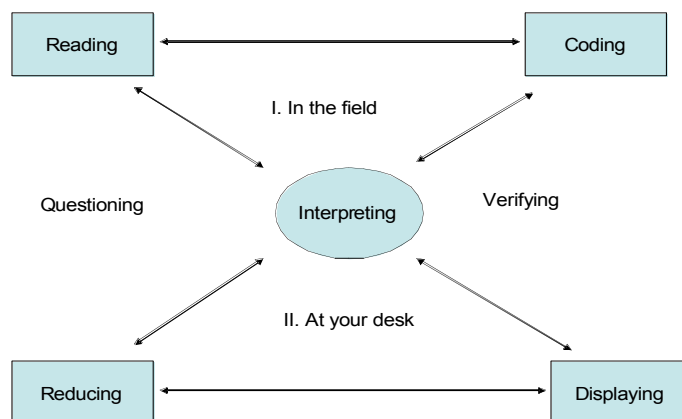
Individual, semi-structured interviews and group activities using participatory methods were used to investigate how women experience and understand the phenomenon of migration to Costa Rica. All research activities were conducted in Spanish, in which I am fluent. Interviews ranged from 30 minutes to approximately 1.5 hours in length and were digitally recorded. The list of questions, which I provided to the participants in Spanish were:

1. How did you arrive at the decision to migrate - either you or the member(s) of your household? i.e., What factors led to the decision? Why did you go?
2. If you went, describe the getting-there experience? What happened? What was it like? If member(s) of your family went, what was it like for you until you knew they had arrived?
3. How long were you or member(s) of your household gone? Why were you gone for that long?
4. Describe the experience of being separated or away from your home/family.
5. What was good about either you or member(s) of your family being away?
6. What was bad about either you or member(s) of your family being away?
7. How has your health or that of your family members changed throughout the experience of migration?
8. What conditions where you live determine your health (what helps, what harms?)
9. How has migration affected this?

Given that the research sought to hear women’s voices, I did not limit the interview to these questions only, but allowed the interview to flow as a conversation.

Analysis in ID calls for moving beyond the state of current knowledge “to advance the initial descriptive claims toward abstracted interpretations that will illuminate the phenomenon under investigation in a new and meaningful manner” (112, p9). For this reason, the researcher is the interpreter and tool of analysis who synthesizes meaning, conceptualizes relationships, and recontextualizes data into findings (112). The researcher may draw widely on a range of mechanical activities to guide the analytic process. Figure 2 illustrates the process followed in data analysis.

Figure 2. Process of qualitative data analysis



(source: Ulin, Robinson Tolley (113))

Following the process shown in this figure, I was immersed in my data from the very beginning through transcribing and preparing preliminary results to present before I left Nicaragua in 2005. I read and coded my data and interpreted it while still in the field, then repeated this process again after adding in the document analysis. The interviews were analyzed and coded to facilitate discovery of themes of the migratory experience. Coding was done manually. In later rounds of coding, these themes were then analyzed against the



list of known determinants of health: income and social status, social support networks, education, employment and working conditions, physical environments, biology and genetics, personal health practices and coping skills, healthy child development, health services, gender, and culture (50,51). Following a process of reducing and displaying, I prepared various versions of the data results until the presentation seemed acceptable, allowing for a solid interpretation of the data.

### **3.6.3 Group Activity**

In keeping with the methodological framework, I conducted a group activity session using popular education techniques. Popular education is

a collective or group process of education, where the teacher and students learn together, beginning with the concrete experience of the participants, leading to reflection on that experience in order to effect positive change (114, p7).

The particular characteristics of popular education are: beginning with participants' experiences with the proposed theme (in this instance, globalization, migration and health); both participants and facilitator are learners and teachers; it is a collective effort that employs a group focused on group problems; it stresses the creation of new knowledge; it leads to action for change (114).

Popular education has its roots in the educational theories of Paulo Freire whose *Pedagogy of the Oppressed*, first published in 1970, advocated learning through dialogue and 'problem-posing' as opposed to the traditional or 'banking' system of education, where teachers deposit knowledge into students' heads and those students may not question that knowledge but must receive, memorize and repeat it (115,116). Freire considered this system to be authoritarian, whereas his 'problem-posing' system "reaffirms human beings as Subjects, furnishes hope that the world can change, and, by its very nature, is necessarily directed toward the goal of humanization" (116, p55).

A popular education session was useful for a number of reasons. It is a method of knowledge translation whereby the women learned from themselves what they shared in interviews without compromising confidentiality; the knowledge was able to be shared with the organization for future use; it allowed critical reflection on problems in society (migration in this instance) and propose action to work toward solutions. The activity itself was adapted from a popular education activity known as “The Wall” which seeks to develop an understanding of the connections between women's daily lived experiences and global economic trends and analyze how women and men are affected differently by economic changes (117). While “The Wall” activity is intended to be a workshop lasting one or two days that focuses on the economy, I adapted the methodology to focus on migration and streamlined it to take a half-day.

The activity as originally intended has women use the image of a stone wall to represent the economy, identifying the inter-related parts (the stones) that build upon one another. The stones in the wall are examined as to how they are changing and how women can contribute to the building of a different wall. The wall is constructed throughout the activity using paper rocks, figures of flying women, and drawings (117). I adapted and reduced the activity to have women build a wall that represents migration. Using paper rocks, women wrote about causes, and about negative and positive effects of migration. Using cut outs of flying women, they wrote down what they could do among themselves for mutual support in addressing the problems migration brings (in an image of flying over their problems). The rocks and flying women were taped onto a paper background.

I followed a stepwise process throughout the activity. An introductory activity helped to break the ice and make sure that everyone was familiar with each other. I then explained my motivation for conducting the activity (to learn from each other, to understand migration better and gain new knowledge, to reinforce relationships within the

*Red*, and to allow participants to discover that they are not suffering alone with migration problems) and asked what expectations the participants had. Next, I asked women to write down on the paper rocks in a few words what, from their experiences, were the causes of migration (i.e., “Why do people go?”) and to tape their rocks onto the paper background. From here, I went through a “But why?” exercise with the participants in relation to each cause in order for a critical analysis. After that, I asked participants to write down both positive and negative effects of migration on different coloured paper rocks and tape them up as well onto the growing wall. I asked participants to explain their answers, and directed discussion to what their answers mean for health. I asked why these effects were particular to women, i.e., how and why do they affect women differently from men? Finally I asked them to write on the paper flying women what response they could take individually and among themselves, as well as through the *Red* to help address problems. All of the written contributions on rocks and flying women were completely anonymous. While some people spoke of what they wrote, it was impossible afterward to identify who wrote what. The ‘wall’ that resulted is the only source of data from the activity.

Results from the group activities were written up in aggregate form using anonymously written quotes from the construction of the wall and the discussion. The organization of the activity facilitated ease of coding for themes and analysis. Both sets of data are presented in the Results chapter, relative to the emergent themes from both of them. I draw upon both of them as well in the discussion of the results.

#### **3.6.4 Journaling**

I recorded my observations throughout my stay in Nicaragua in order to provide reflections as a potential help in illuminating the analysis of the data. However, I did not end up using any citations from it in the analysis of data.

### **3.6.5 Document Analysis**

The ESAFs and PRGF from 1991, 1994, 1998, and 2002, as well as Nicaragua's 2001 PRSP, were analyzed for conditionalities that affect areas of social spending, extension of credit, and market liberalization (71,118-121). Additional literature was reviewed for actual compliance with conditionalities and their effects. Results from the document analysis were used when analyzing the interviews and group activity in order to match conditionalities with experiences.

### **3.7 Quality, Social Justice, and International Research Concerns**

There is concern that when researchers from countries with a larger share of the world's wealth engage in research in less wealthy countries, the benefits of that research often stay with the wealthy researcher (122-124). There is a need to address this concern and how I tried to minimize the possibility for this outcome in my research. I refer to Lincoln's set of criteria for quality in qualitative studies as a guide for conducting my research. They are: voice, critical subjectivity, reciprocity, sacredness, and sharing the perquisites of privilege as a set of criteria for quality in such studies (125). Positionality or standpoint judgments are also on this list of criteria and will be addressed in section 3.7.2.

Lincoln characterizes voice as "resistance against silence...resistance to disengagement...[and] resistance to marginalization" (125, p282). "Attention to voice - to who speaks, for whom, to whom, for what purposes" and the extent to which that is a hallmark part of the study will determine its "openness, engagement, and problematic nature" (125, p282). I addressed this criterion by setting up a project that sought out the voices of a traditionally marginalized population. In addition, I allowed the voices of my participants, through the results, to dominate and direct the description of their experiences.

Critical subjectivity is another name for reflexivity, which is “the ability to enter an altered state of consciousness or ‘high-quality awareness’ for the purpose of understanding with great discrimination subtle differences in the personal and psychological states of others” (125, p283). The key is to heighten one’s self-awareness in order to create personal and social transformation (125). This is a tall order for any researcher; even Lincoln admits that “there is no general agreement on what the various forms of subjectivities or reflexivities might be” (125, p283). Reflective journaling and field notes as well as discussions with committee members, other graduate students in my program and members of the *Red* in Nicaragua were the techniques I used to enhance my critical subjectivity.

Reciprocity speaks to the relationships in researching where “parties to the research effort [are] marked by a deep sense of trust, caring, and mutuality” (125, p284). Sacredness is also related to relationships, but on a deeper level. It is about a “profound concern for human dignity, justice, and interpersonal respect” (125, p284). Sharing the perquisites of privilege is acknowledging that we, as researchers, owe the prestige (and resulting monetary compensation) that comes from our work to the people who shared their lives with us. Lincoln cites two examples of researchers who have either returned direct profit to participants or negotiated power over the publication in favour of participants (125).

The idea of community as the arbiter of quality is reflective of the fact, according to Lincoln, that “research takes place in, and is addressed to, a community” and that it has “much broader implications and uses than those to which most research has been directed in the near and far past” (125, p280). It is fitting that one way to describe how this idea establishes quality comes from Nicaragua, called “neighbourliness,” and acknowledges the “close connection between knowledge and the community from which it springs” (125, p281). I attempted to fulfill the requirements of this criterion by providing preliminary results and final results of my study to the *Red* both in an academic context and in lay

presentations. I presented preliminary results to a number of participants, students, academics, and government officials before leaving Nicaragua in October 2005. On concluding my analysis, I again presented a more synthesized version to similar groups of people in July 2006. The *Red* will receive a translated copy of my thesis following a successful defense. The *Red* will also be acknowledged on all presentations or publications of any or all of my thesis results, analysis, and discussion.

### **3.7.1 Rigor**

Rigor is a vital element in enhancing the credibility of any research. Research in an international setting poses additional challenges in ensuring rigor. Meleis offers eight criteria to ensure rigor and credibility in the scholarship of developing culturally competent knowledge: contextuality, relevance, communication styles, awareness of identity and power differentials, disclosure, reciprocation, empowerment, and time (126).

Contextuality calls for “knowledge of research participants’ lifestyles and situations” in order to “provide a context for the phenomenon” (126, p10). This is necessary in order to avoid marginalization and stereotyping of groups (126). In my study, this criterion is partly addressed through my understandings shaped by personal experiences traveling and studying in Nicaragua and other Latin American countries, as well as an academic background studying the Latin American context. Context, according to Meleis includes, “sensitivity to structural conditions that contribute to participants’ responses and to the interpretations of situations informed by experiences, by validation of perceptions, and by a careful review of existing knowledge” (126, p10). The framework of this study (placing the experiences of women in the context of globalization phenomena) complements my personal understandings in addressing this criterion.

Relevance is “whether the research questions can serve a marginalized population’s issues and interests in improving their lives” (126, p10). It is important that the research questions were not developed based on stereotypical images of a population and that the results not reinforce or further enhance stereotypes (126). I feel that this is not the case, since much of the information used in determining the research questions came from studies carried out by international organizations operating locally in Nicaragua (the International Labour Organization and the International Organization for Migration), and which were concerned specifically with the phenomenon of migration. The extent to which the study population participated in my research process provides evidence of the relevance of the study (126).

In response to this, the *Red de Migraciones* has had a considerable interest in my project from the beginning. They facilitated almost all aspects of carrying out the project and even requested permission to allow an external researcher to use my study design to augment my work for their purposes. In addition, they have shared my work with a representative of the International Labour Organization, Milagros Barahona, who participated in some activities in San Marcos. Although the *Red* lobbies the Nicaraguan government on an on-going basis advocating for better conditions and the rights of migrants, the government response is often given that the *Red* relies only on anecdotal evidence, instead of credible studies. The *Red* feels that my work can contribute to showing credible evidence to the government.

The criterion of communication styles refers to whether the interpretations of the data demonstrate a “critical understanding of the preferred communication styles for the research participants and their communities, including the most congruent design for the population’s communication style” (126, p11). The tools used for data collection in a population and evidence of understanding of the “subtleties and variations inherent in

language as well as symbols” demonstrates if the researcher rigorously incorporates this criterion (126, p11). The use of conversational (semi-structured) interviews is one way in which I attempted to meet this criterion, as was the use of popular education for the group activity, as popular education has been widely and successfully used in Nicaragua since the 1980’s (114). I also addressed this criterion by taking a four-week class in Nicaragua in colloquialisms and idioms. Presenting the results to the *Red* and participants in a manner that was understandable (and approved by the *Red*) also constituted complying with this criterion. This presentation took both oral and written forms. Written results were put into common language and made into a booklet for dissemination to participants and others.

Meleis recognizes that there cannot be an assumption of power equity in research with marginalized populations (116). However, being aware of identity and power differentials is essential in order for participants to have a reasonable chance “to exercise the power to dictate the research questions or to refuse to participate in the research project” (126, p11). Establishing rigor with this criterion requires the researcher to acknowledge the power differential and provide evidence of how she was able to establish a more horizontal relationship and develop shared ownership of the data (126). Having consent forms and making sure participants understood them ensured that they knew they could refuse to participate at any time. The section “Quality, Social Justice, and International Research Concerns” demonstrates an acknowledgement of the power differential in this study. In addition, I volunteered with the *Red* outside of the study so that I had the chance to interact with the participants outside of the research setting, and hopefully this allowed for a more horizontal relationship.

Uncovering “marginalized populations’ experiences in ways that are authentic to the narrators and understandable to the audience” (or disclosure) is important to the authenticity of data in a study (126, p12). This can only be done if participants trust the



researcher. Demonstrating evidence of trust-building and assessing the extent to which participants are able to respond to or decline questions are ways to establish that this criterion for rigor has been addressed (126). I spent time with the *Red* as a volunteer between May and September 2005 in order to get to know participants and build trust. The ability to participate, withdraw or decline all or partial participation was guaranteed in writing on the consent form and reaffirmed verbally with all of the participants. I believe that participants trusted me and felt open in their responses. I shed tears with many women throughout their retelling of their experiences. There were a few instances where participants shared personal information beyond the scope of my research questions that they later asked not to be included; I felt privileged to have gained that level of their trust.

Reciprocation refers to identifying the goals of research collaborators and participants, and making every attempt to address them (126). Demonstrating rigor in addressing this criterion requires

recognition of the diverse goals of the research members' team and participants, demonstration of strategies used to meet the goals of each collaborator and participant, and demonstration of awareness of other goals that are related to the population under investigation (126, p12).

My own goals are scattered throughout this Methodology Chapter, as well as reflected in the rationale and research questions. The *Red de Migraciones* indicated their goals by showing interest in collaboration with me after seeing my goals and some background information. The results of my research and the *Red's* acceptance of them represent a successful attempt to meet both sets of goals.

Empowerment is "a process of working together to increase control over one's life events" (126, p12-13). The responsibility of the researcher is to raise consciousness and empower participants to "participate in dealing with their health care issues or in answering their own questions" (126). A possible outcome of the interviews is that in talking about

their experiences, women became more conscious of how migration is affecting their lives. The popular education session had a more direct purpose in fulfilling this criterion. In that session, participants had the opportunity to explore directly the impact of migration and to look for ways to address those impacts that are empowering.

Meleis argues that a culturally competent researcher must have a flexible approach to time “to establish trust, to identify reciprocal goals, to develop maps of action, and to complete the research process” (126, p13). I spent five months in Nicaragua for this exact reason. Experience has shown me that North American concepts of time are different from Latin American concepts. Conducting my research in a Latin American country calls for an understanding and engagement of their concepts in order to successfully learn from women’s experiences.

### **3.7.2 Personal Statement**

This section addresses positionality, as called for by Lincoln (125). One sense of positionality, described by Caelli, Ray, and Mill, calls for an explicit rendering of the “researcher’s motives, presuppositions, and personal history that leads him or her toward, and subsequently shapes, a particular inquiry” (127, p9). A personal statement is also necessary since Interpretive Description recognizes the researcher as the instrument of analysis, and “must explicitly account for the influence of bias upon the research findings as much as possible” (105).

I am a graduate student in Community Health and Epidemiology, with a Bachelor’s degree in International Studies. I have traveled to Israel, Egypt, Guatemala, Nicaragua, Honduras, Belize, and Mexico, as well as various locations throughout the United States and Canada. Throughout my undergraduate studies and travels, I have come to see the world as structurally inequitable in distributing wealth, in accessing opportunities for

bettering one's position, and in ensuring equality of health outcomes. I take the position that health determinants are primarily socio-environmental.

The decision to undertake research in Nicaragua came after spending the summer of 2002 as part of a class abroad, where I lived for a few weeks with a family who had a fairly low standard of living (even by Nicaraguan urban standards). It was my first experience spending an extended amount of time around poverty and I came away with a profound conviction of its injustice.

I feel that one way to address the unjust imbalance in health that the current trend of globalization has created is through equitable research that calls attention to globalization's failings, while creating reciprocal relationships with 'the researched' and providing them access to that research (which should benefit them). I hope that this research project has achieved those goals. Because I am strongly attracted to making connections with people, qualitative forms of inquiry best suit my interests. This is the background with which I approached my research.

## 4. Results

### 4.1 Introduction

In presenting the results I will first present a more detailed description of participants, then move on to explore the migration motivations of migrants, how the migration experience is different for women due to gendered societal and employment roles, as well as their perceptions of what they experiences as different men's experiences, and what migrants and their family members perceive as benefits and disadvantages of their experiences. Quotes are attributed to individual interviewees as well as to anonymous responses from the group activities in Estelí and San Marcos. Some interviewees have been given pseudonyms to maintain confidentiality, however some refused, maintaining that they did not want to be anonymous contributors. The reader may notice that group activity responses tend to be more abstract (less personal), shorter and more analytical in relation to interview responses which evoke more personal 'I' statements and stories without necessarily an analytical component. This can be directly attributed to the two different data collection methods used. Using these two methods together has allowed women a way to both share their stories (descriptive) and explore their meanings (analytical) in order to express their understanding of how globalization-induced, labour-seeking migration from Nicaragua to Costa Rica affects their lives.

I then turn to the document analysis of structural adjustment agreements, and poverty reduction and growth agreements, which provide a description of conditionalities in terms of privatization, liberalization, deregulation, as well as other reforms required in particular sectors. Only structural measures and reforms that are connected to social outcomes (by which I mean pathways of social determinants of health) are presented. Information on the actual implementation of these conditionalities is also provided. A

discussion of the context of these agreements as envisioned by their creators, as well as a critique of their assumptions, concludes this chapter.

#### **4.2 Description of Participants' Contexts**

The purpose of this section is to distinguish further among the different participants (interviewees vs. other participatory group participants; Esteli vs. San Marcos) and also to give a more detailed description of the average context and conditions of participants' lives in terms of housing, food, everyday stresses and strains, financial condition, and family situations. This description is based only on my observations.

In each location, all interviews (12 in total: 6 from each location) took place before holding the group activity. An open invitation to attend the group activity was extended to all local *Red* women members, as well as a personal invitation extended by me to all interviewees. As a result, some interviewed participants attended the group activities (but not all), and additional women from the *Red* also attended. The total of additional women (non-interviewees) who attended the group activities numbered 15, bringing the grand total number of participants to 27.

The main difference between interviewees in Esteli compared to those in San Marcos is the designation of migrant or family member of a migrant. Most interviewees in Esteli were family members of migrants, whereas all in San Marcos were returned migrants. I did not ask group activity participants to declare their migration status, I simply asked them to respond based on their own experiences with migration (whether a returned migrant or a family member of a migrant).

My observations of participants' living conditions and contexts are based on visits to most of their homes and conversations with them both inside and outside the confines

of the interviews. In addition, my experiences during a number of months spent living in Nicaragua add to the description.

Most participants live in simple houses made of wooden planks or concrete. Wood is the lower-valued building material since the heat and humidity in Nicaragua permits faster degradation due to insects and rot. Houses often have a small number of rooms, including a kitchen and common area, and one or two sleeping rooms. Some houses have a bathroom built in, while others have a latrine outside the house. All houses in urban areas have running water (as long as the bill is paid and there is no service interruption: both common problems). Floors vary between dirt and concrete; few have tiled floors. A roof is considered a separate unit from the house, especially since walls do not often reach to the roof. Roofs of the average participant were made of corrugated zinc (metal). A sloping roofing frame usually holds the roof to allow for rain runoff, although sometimes roofs are set right on top of the house with bricks or cement blocks between the tops of the walls and the roof to allow for ventilation. The roof always extends past the outside walls of the house. Inside walls of wood houses are not usually wood – they often consist of curtains, plastic sheeting, or a wooden frame covered in newspaper. Cement houses usually have cement walls. Kitchens consist of a sink or small *pila* (see below) and a stovetop (no oven) with one or two burners sitting on a table or counter structure that is connected to a 100 lb. or 50 lb. gas tank. Not all families were able to afford a refrigerator. Bathrooms have a toilet and a shower that usually consists of a small, unenclosed pipe running up the wall with an elbow joint to allow for water to come out above one's head. Houses with latrines usually have a similar shower setup outside the house. None of the houses I saw had a bathtub. Houses have a space for washing clothes that often serves as the common sink. A cement structure called a *pila* has a deep basin on one side and on the other a slanted, shallow ridged surface with a hole on the low end to allow for water to run out is used for

washing clothes and sometimes dishes, pots and pans. The deep basin is filled up with clean water and a small dish is used to transfer water to the shallow side to for washing. Almost all houses have a small garden/open area either in the front or back where flowers or trees grow and the space is used to dry clothes in the sun.

The common Nicaraguan diet is rice, small red beans, eggs, avocado, and corn tortillas. The national dish is called *gallo pinto* and is a mixture of rice and beans together lightly fried with oil or lard. Depending on the season, a variety of fruits and vegetables are also added to meals. Fruits are commonly pureed with water and sugar to make a variety of *fresco* beverages. Meat is often too expensive to eat everyday.

There are a number of everyday stresses and strains that were common to my participants. Meeting immediate needs seemed to be the most important: providing three meals a day, every day for themselves and their families; and being able to pay for electricity and water services. The widespread lack of refrigeration capacity means that most people do not stockpile perishable foods; they must buy these items every day. Vendors selling these items constantly walk the streets yelling out what they have for sale. Supermarkets and open markets also offer perishable goods for sale every day. Inconsistent water and electricity services are common in Nicaragua. Many participants faced frustrations in getting ready for the day, preparing meals, housing upkeep, and the ability to allow their children to study in the evenings with frequent power and water outages (the sun is down by 7:30 pm). General worries about keeping the house from falling apart, and keeping flies, roaches and rats away from food were also apparent.

Most participants' financial conditions were very poor, reflecting their turning to migration as a means to resolve their difficulties. In Nicaragua, participants worked as typists, domestics, piñata makers, cigar factory workers, or homemakers. Some participants had very small, family-run businesses such as a one-dish restaurant or corner store. These

businesses were operated out of their homes and were in competition with myriad other similar operations. Money worries and steadily increasing prices are a constant source of stress.

All participants were mothers and many were single mothers with approximately 3 children each. Marrying and having children in one's late teens and early twenties is common, but marriages do not always last and in Nicaragua's *machismo* culture men often leave responsibility for their children with women, both within marriage and after, reflecting the cultural understanding of women's role as primary caregiver. Motherhood is therefore an integral part of the migration experience. Households are often made up of two generations: parents and grown children with their own families and children. In some cases households also had other members, such as when participants were caring for other migrants' children.

### **4.3 Causes of Migration**

The Nicaragua to Costa Rica migration demonstrates motivations of necessity and crisis that deal with immediate concerns, both personal and structural. In addition, there is a more forward-looking anticipation for a better life and desires to learn about a new place. These are all classic characteristics of international migration (67). All represent negative valuations of the current situation, but the first set seems borne more of desperation than hope. The interview data bear this out.

#### **4.3.1 Personal Level Need**

On a personal level, some need was starkly and broadly expressed as directly related to poverty:



*If you want to know why I went to Costa Rica, it's because I am a single mother, a widow for eight years, and I am struggling alone with my children. There's no salary here. I can't pay for health care for my children because you have to pay for everything here. (Angela)*

*So I decided to go to Costa Rica to work in order to earn money, and then later to support my sons because their father didn't stay with me very long. He abandoned me with the two boys. So, I went to Costa Rica out of need - yes, poverty. (Leticia)*

Similarly, when asked in group activities what are the causes of migration, many gave very brief answers also broadly demonstrating need such as *poverty, to get ahead, or economic instability*. (Estelí and San Marcos) Often, need was expressed in more specific terms. Some spoke explicitly of the need to pay debts.

*I had debts and I was suffocating and there was nothing to do about it, so I said, 'I'm going to go.'* (Ana Cristina)

*So [my daughter] said to me, 'Mama, I want to go to work and pay off this debt I've run up. I'm going crazy,' she said, 'I can't sleep,' she told me. So she made the trip. (Flora)*

Sometimes the debts were blamed on what could best be described as government negligence if not criminality.<sup>2</sup>

*My sister was in Costa Rica because of a problem. We had taken out a bank loan. I had a brick factory, but at that time they closed all the brick factories because they said they were going to reforest along the river and the brick factories were damaging this. They said they were definitely going to relocate us in another place and replace our lands, but it turns out it was just city politics and they took our brick factories and left us hung out to dry. I was stuck with the bank loan debt and since we paid it together, there was no alternative, so she decided to go. (Lorena)*

For others, their need was explicitly linked to lack of affordable housing, logically a consequence of the demise of public assistance for housing.

*My mother said she wanted to go so she could buy a little house here because we were just renting and renting, and always paying the rent. (Lesbia)*

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<sup>2</sup> In keeping with the methodology of this study, no attempt to validate the statements of fact made by the women was made. This does not imply acceptance of these statements as factually true. Apart from the document analyses that follow, the study concerns how women express and understand their own experiences.

*“It’s the only way I can save my house from being repossessed. If I stay here in my country, I run the risk of losing my house.” (Aurora B)*

Necessity was also bound up in the desire to invest in their children’s future through improved education.

*Here in Nicaragua I could never give my children a better education. I’ve had to stop paying for two to study and I just have two left still in school so that they can at least learn how to read.” (Angela)*

*It’s the only way I can save my house and send my children to university. (Aurora B)*

#### **4.3.2 Personal Level Future Desires**

Desires for the future were expressed in hopes of making life better for themselves and their children or wanting to get ahead. Many of these responses come from the group activities:

*I wanted to give my children better opportunities in life and a chance. (San Marcos)*

*I wanted a better quality of life. (San Marcos)*

*They want a better future for their family. (Estelí)*

There was also a sense of exploration in getting to know Costa Rica -- *“I’m curious”* (Estelí) -- sometimes expressed in the sense of feeling like there’s nothing left to lose:

*I want to go to Costa Rica...to stay and see if life there is really like they say. (Blanca)*

*My brother decided to try it out too. He used to work in an office, but after one of those personnel cut backs he found himself in the same situation as everyone else. He didn’t owe anyone, but he didn’t have a job and couldn’t find one, so he went too. (Lorena)*

Two other personal motivations emerged, but were not widespread among participants:

The first was the desire to escape family problems.

*One day my son spent the whole school day playing cards and he bet his backpack since he didn’t have any money, and they won it from him. They told him, ‘when you get home your mother will punish you.’ They even told him, ‘if you have some shoes you don’t want, bring them and we’ll take them too.’ So, he left without saying anything to me and without taking any clothes, just what he was wearing.” (Aurora A)*

*When my daughter decided to go, well, she had been really badly treated by her partner. He hit her, he treated her badly, he pulled her hair and everything. She would always come here crying, telling me what he had said to her. She told me, 'look, he's threatening me. If I leave his house he will come here and bring me home.' She left me a note saying that she went in order to rid herself of him. (Blanca)*

In both cases, the person left without saying goodbye, possibly suggesting impulsive actions or feelings of guilt. In a second instance, one participant was offered a job paying a salary she felt she could not refuse.

*I told her, 'if you pay me \$600 a month, I'll go.' She said, 'No, look, this is what my husband and I have arranged that we can pay.' 'Well, I can't then,' I said, 'because I too have continuing needs here.' But it was all lies, because I was looking for a pretext not to go. After, she was quiet a minute and she told me, 'look, I can offer you \$550.' So, she was the one who blocked me in, because now I couldn't say no. What was I going to say? Now I had no escape, but I thought too, \$550 is pretty good. There are things I can do with that that I would never be able to do with what I make here. (Luisa)*

#### **4.3.3 Structural Level Crisis/Need**

Considerable concern over the economic situation of Nicaragua was expressed in both focus groups, either as crisis or as widespread poverty. The lack of employment, dignified work, or salaries that pay enough to live were intimately connected to this economic situation and is one of the strongest reported reasons why people go.

*There's no work. (Estelí)*

*You can't find dignified employment with a good salary in our country. (San Marcos)*

*I had looked for work here and no...I didn't find work and if one time I found work, they pay you such a misery that it's not good for anything. (Leticia)*

Women keenly feel the widespread gender and age discrimination in employment opportunities. This effect was frequently seen in the few classified employment ads in Nicaraguan newspapers which specified gender and age requirements of job applicants. Many women are also aware that their low levels of education combined with their gender put them at a high disadvantage in the labour market.

*Women go because they have reached a certain age and they have no other option. (San Marcos)*

*There's a lack of work for us, women who don't have a high level of education. (San Marcos)*

#### **4.4 Explanation of Causes**

Several reasons were offered as to why these migration causes exist. Structural reasons were the chief explanation however cultural rationalizations were also invoked to explain the situation.

##### **4.4.1 Structural Explanations**

Several structural explanations ranged from perceived corruption and unfair wealth distribution, to globalization and free trade, to a simple lack of interest in the plight of migrants from government officials. Politicians generally are perceived very negatively and government is held responsible for many of the problems facing migrants and the causes of migration. There is a sense of a high level of corruption, a lack of interest or political will on government's part to address migration issues.

*There's poor organization of government, there's money laundering, and the laws make corruption easy. (Estelí)*

*There's a lot of exploitation on the part of politicians and businessmen. (San Marcos)*

The distribution of wealth between those who run the country and the rest of the population doesn't seem fair to participants, and again is often linked to political elites.

*The politicians earn their salaries in dollars and make 100 times more than what regular Nicaraguans make in córdobas. (San Marcos)*

Participants in San Marcos were able to understand and identify different elements of globalization -- *because of foreigners, free trade and neoliberalism* (San Marcos) -- while the concept

seemed foreign to Estelí participants, although it was recognized there that the Free Trade Zone was part of the problem. This may have to do with the nature of how the *Red de Migraciones* works throughout the country. In San Marcos, they are affiliated with a national women's organization where members have the opportunity to explore these issues. In Estelí, the Red is coordinated through one volunteer who has a separate full-time job. But it was a perceived lack of interest on the part of government officials that was most often referenced by the study participants.

*As emigrants [in Costa Rica] we feel unprotected. Our government can't take care of poor people. They're not interested. In general they only care about their personal interests and they're all the same. They just go around fighting between themselves. (Angela)*

*We have to hope for a change in government, but in economic policies, there's no change. A poor Nicaragua can't afford to eat a pork chop. The ministers eat them, or deputies (elected officials), the university graduates can. But a poor wage earner will never eat pork loin or beef loin or ribs. (Aurora B)*

#### **4.4.2 Cultural Explanations**

Cultural explanations invariably dwelt on family life or gender relations.

*We have big families, early pregnancies, and a lack of information about birth control. (Estelí)*

*We have a lot of children and we are single mothers because of "love" and sometimes we are stupid. (San Marcos)*

*It has to do with machismo. (Estelí)*

A concern with such responses is that women seem to blame themselves for their situations, even though they identify *machismo* and a lack of knowledge and education about family planning issues. Efforts to probe this question further were hampered by the assertion *that's just how it is* (Estelí), revealing the ingrained nature of cultural practices and the difficulty of looking at them with a critical eye.

#### **4.5 Migration is Different for Women**

Women have a different experience of migration than men. This was attributed to stronger psychological effects felt in women as well as aspects of migration that men just cannot understand. Part of this is related to gendered roles such as responsibility for children and childcare, which in most women results in deep attachments to children and family, producing deep emotional pain when separated. Gendered employment and discrimination are other sources of the different ways women experience migration.

##### **4.5.1 Strong Psychological Effects on Women**

At the San Marcos group activity I asked why women suffered so much compared to men. The participants replied that it is not that men don't suffer; it's just that *men suffer more physically and women suffer more emotionally*. (San Marcos)

*In the problems of our family and our children, women are most affected. The men feel it, but not like women.* (Blanca)

##### **4.5.2 A Mother's Pain at Being Separated from Her Children Because of Migration**

Going to work in Costa Rica nearly always means that women are separated from their children in Nicaragua. This causes immense pain. This was prolifically expressed by so many of the women, and in such evocative terms, that several examples from the data are included below.

*May God wish that when you become a mother, your children never leave. This is the most sad and most painful thing that can be because you become psychologically ill. It is a horrible, horrible, horrible pain.*" (Aurora A)

*In terms of family, I thank them very much for what they did for my son and for me. The saddest thing for me was to have left him at 8 months* (Janeth)

*So I went [crying], with the pain of my soul I went and left my daughters. My god, that was terrible for me, horrible to know that I was going to be gone a year without them.* (Ana Cristina)

*The day that I left for Costa Rica my children stayed here crying and crying for me not to go. It was really sad. (Leticia)*

*The bad part was being far away because I couldn't breastfeed my children. I didn't give them the milk they really needed, mother's milk, but they got milk from a bag or dried milk. (Angela)*

*I looked at everything that day on the bus on the way to Costa Rica and I was sad because I had left my children." (Luisa)*

#### **4.5.3 Having to Take Care of Other Women Migrant's Children**

Children left behind are often given to the care of other women, as one participant describes in some detail.

*This boy, I took care of him since he was little because my sister had to work so much her whole life and while she left [to Costa Rica], I took care of him. Now he's twenty. In cases like this when people go away you have to assume the role of both mother and father. Although this doesn't ever substitute for a real mother, it helps. (Lorena)*

#### **4.5.4 Working as a Domestic**

More than half of all women who migrate to Costa Rica work as domestic employees, whereas there are no men who do these jobs (81). Cooking, cleaning, washing, and taking care of children often for 12 hours a day or more is a typical job description. This job reinforces gendered stereotypes of women's work and women's roles, and makes women vulnerable to overwork and underpay.

*In my first job in Costa Rica they paid me so little and I had to work from 6 in the morning and I went to bed at midnight. I only stayed at that job for a month. (Leticia)*

*I worked and took care of everything, including in the garden, cleaning, washing, ironing, I cooked, and even served as guard. I went to bed really late at night. (Aurora B)*

Most domestics live in the home of their employer, but do not have any rights beyond those of employee. For example, they often cannot use the telephone. One participant was required to find alternate sleeping arrangements on her one day off (Sunday), which

involved renting an apartment with a group who crowded in for one day's use, while the apartment sat nearly empty the rest of the week.

#### **4.5.5 Discrimination in Costa Rica against Nicaraguan Women**

Nicaraguans in Costa Rica endure a phenomenon of strong discrimination against them in general due to the sizeable number of immigrants in the country (irregular migrants numbering over 350,000, plus permanent immigrants). This discrimination is sometimes expressed in gender-demeaning ways, with reference to women émigrés only being interested in or able to work in the sex trade.

*They say that (Nicaraguan) women just go there to be prostitutes, but in my case that wasn't true. There were a lot of people who asked me if I wanted that kind of work. In no way would I ever accept that kind of work. (Janeth)*

The general perception is that Nicaraguans are taking jobs from Costa Ricans and that they only bring trouble with them. It is similar to the Mexico-US migration issue. This discrimination is hurtful and felt deeply. One woman I spoke with in casual conversation said that the way she was treated in Costa Rica made her feel low and despicable *like a worm*. Or, as one participant expressed about how she was treated at work: *The people look at you sideways and they treat you badly. They don't trust you. They walk right behind you seeing if you're going to take something. It makes you feel bad. (Ana Cristina)*

#### **4.6 Beneficial Effects of Migration**

Reflecting what other research evidence asserts about the benefits of migration, women in this study described several beneficial effects of work in Costa Rica. Remittances are the biggest benefit. Through remittances, migrants are often able to fulfill their immediate needs and mitigate the crises that drove them to seek out migration in the first



place: finding a job, paying debts, providing for children, providing education, and fixing up the house.

*There are better salaries there and better working conditions for women (San Marcos)*

*Some friends helped me find a job that wasn't too bad. I worked Monday to Saturday. They didn't treat me badly and I what I earned was so-so, not bad. (Leticia)*

*I was able to pay my debts off ahead of time. (San Marcos)*

*On my first trip, I was able to pay off my mortgage. (Aurora B)*

*My children ate more; they ate better. They got their three meals a day and things went better for them. (Leticia)*

*While I was in Costa Rica I could send money for my daughter to go to university. (Aurora B)*

*I was able to get a little bit of money together to get a better roof. That was the good thing that I got from Costa Rica. (Angela)*

The migration process also allows time for reflection. Some people find that they took relationships for granted. They find themselves more connected than ever to those around them and to returning migrants. Self reflection can also result in valuing oneself more.

*I value my family more. We are closer now. (Estelí)*

*It seemed like we were isolated from each other before. Now it feels like we have a better bond. (Ana Cristina)*

*I learned how to be independent and value myself too. (Janeth)*

It is important to note, however, that these benefits – as well as the costs discussed in the next section below – are not universally perceived by all the women participants.

#### **4.7 Harmful Effects of Migration**

Even though migration may have strengthened family bonds in some instances, the single most cited harmful effect is precisely in migration's emotional costs to the family. It was shown earlier that women feel their suffering is concentrated in emotional and

psychological dimensions. Most distressing for them, then, is the internal suffering as a result of being separated from their families. This includes the deterioration of family relationships, worrying, grief at not having loved ones close, and an overwhelming feeling of sadness. Much of the separation effect is due to unstable lines of communication, a particular difficulty given the lack of access to technology as a result of poverty, working conditions in Costa Rica, and poor infrastructure. Strongly implied in participants' responses is the central self-identifying dynamic of the family – without family, one is alone and virtually without support in the world. Even if other sources of support are found, nothing replaces the family relationship.

#### **4.7.1 Sacrifice**

Interview data show that most women feel that migration is a necessary sacrifice in order for the family to survive. *Sometimes the sacrifice you have to make in going away to work is bad. In working towards getting ahead, like in economic problems...definitely it is difficult because in order to be close to your family you have to go away to earn just one peso more.* (Lorena) It was difficult for people to give up certain things, but many women saw it as their only option.

*With my sacrifice, I have supported my children. I improved my house. I helped my sister. I helped my relatives. It was painful and a sacrifice that you make in order to satisfy other things, other material things that you need.* (Luisa)

*It's not that I wanted to go away from home, but I did it out of necessity.* (Leticia)

#### **4.7.2 It is Difficult to be Far Away from Your Family**

*The most important thing is being close to your family.* (Lorena) Family is the center of most Nicaraguan's worlds. Almost all women spoke of family as a vital necessity -- *A person really needs their family, to be with them* (Flora) -- almost to the point where it was seen as a cultural characteristic:

*We Latinos have, I don't know if it's a defect or the strong love of the family, but when someone says that something has happened to our family, or to a son or daughter, we get really desperate.* (Aurora B)

Many Nicaraguan households are composed of nuclear families plus parents or children who are starting their own families. Unlike in North America, the idea of independence in late adolescence and early adulthood is unusual. This might be explained by cultural norms as well as logistics, since lack of material resources makes it difficult for adult children to live on their own. This same lack resources means that a person who is as far away as Costa Rica is virtually inaccessible. This is a difficult transition to make and one that most people don't get used to, whether the migrant -- *Being far away from your family is horrible* (Lorena) -- or the ones left behind -- *The family unit is not the same if [my daughter's] not here* (Blanca). Many people express a powerful sense of loss at being separated

*It's sad because I live dreaming about my daughter. I need her.* (Flora).

*It hurts me that my mother is there because I need her. We are the only women in my family -- all the rest are brothers -- so we are really close... What I wouldn't give to have my mother with me.* (Lesbia).

#### **4.7.3 Long Distance Makes it Worse**

Many people find it difficult to maintain loving relationships over such a long distance and family cohesions is often lost over the course of the separation. The sense of connection seems lost when the person is gone. People feel like they don't exist any more for the person who is far away. This can result in bitterness: *Sometimes you regret that you supported these people that left their country* (Lorena). Overall, migration means that families can no longer share in day-to-day events and experiences.

*It was difficult for me because my daughter left a five month-old daughter. Now she's big, almost 11, and she doesn't know her mother because she was only five months. She only remembers her a little. Her daughter needs her affection. I told her to come here as soon as possible because she is losing the affection of her daughter, the family love. For me the bad part is not having that relationship; that close communication. To be far away is a homesickness I feel.* (Blanca)

*My daughters became distanced from me because I didn't have time to come home. That was sad and hard. (Ana Cristina)*

#### **4.7.4 Unstable Lines of Communication**

Part of the reason for this difficulty in separation and loss of family cohesion are unstable lines of communication. Depending on the income level of the family, having a landline phone may be impossible. In any case, landline phones are only useful for making local calls, given that the long distance services offered by the phone service are very expensive. At-home long distance is a luxury only for the well off. Many Internet and phone service businesses exist that charge cheaper rates, but privacy is not often possible. These services operate from about 7:00am to approximately 10:00pm, which are often the same working hours of domestics. Cellular phones are prolific, but monthly payment plans are virtually non-existent. Minutes are purchased in increments of approximately US\$1, \$5, \$10, and \$20. A US\$1 card is worth about 4 minutes; a \$20 card, a little over an hour. Accepting calls on a cell phone does not use up minutes, but with high per-minute rates, people do not use cell phones for long conversations. If a person changes cell phones (which is not uncommon) they will have lost communication with anyone they cannot reach to inform them of the new number. Changeovers of phone book information on cell phones are uncommon since buying and selling of phones is often done in the informal sector. Maintaining communication, then, between Nicaragua and Costa Rica is often very irregular, and, as the interviews show, there is often a sense of desperation when contact is lost. Maintaining communication is a high priority, sometimes even above work rules:

*In the middle of the week my mom calls me in the [tobacco] factory, but since I can't have my cell phone on at work, I put it on vibrate. When it vibrates, I answer it carefully and go to the bathroom to talk to her. Sometimes the calls don't come through to my cell. (Lesbia)*

Total loss of communication is not completely uncommon. It is devastating:

*When she left I cried and cried and cried. Finally after almost 10 months I found out about her. And after that we lost communication for two years. I keep suffering because I am not with my daughter, because I don't have close communication with her. The truth is we don't know for sure where she is. In the 10 years that she's been in Costa Rica, I have had very little communication with her. She doesn't feel safe to write or call because she's afraid of persecution or that [immigration] will find out where she is and she'll still be working when they get there. I tried to communicate with her, but it was hard because her number wasn't in the phone that I had, and she had changed cell phones. (Blanca)*

*My son went away when he was 17. Since then I haven't heard his voice. Ah, well, he did come back after the first three months, excuse me. But after that he has never been with me again. ...[he sends] nothing, nothing, nothing. Not even a call, a letter, absolutely nothing. As if I don't exist." (Aurora A)*

#### **4.7.5 Women Worry about what is Happening to those who are Far Away**

The mental and emotional suffering of women can be characterized in one way as the worry they feel for family members who are far away, especially if the person is a son or daughter. There is a sense of impotence in the situation: *It's horrible knowing that there's nothing you can do to help the person who is so far away, who may be sick or having some other kind of difficulty.*

(Lorena) Worry is a significant source of stress and extreme anxiety for women, many of whom identify themselves as worriers. *You don't know what is going to happen. And sometimes I am just thinking of an accident, of...my god, so many things come to me. (Flora)* Fears of death or a loved one dying alone are common.

*As a mother, I am worried because, you know, what if someone died? As much her as us. In case of an emergency. For example her father, or me, or a brother. How would we notify her right away if someone died? She worries about the same situation. So we don't know what to do. (Blanca)*

*I know of a woman who was killed. She was in a morgue and they sold her to a hospital for use as a cadaver. She was my mother's sister-in-law and we didn't find out for a month. She just disappeared... There are so many things that one imagines can happen." (Lesbia)*

There is a significant amount of worry for family members' well-being while crossing the border and getting established in Costa Rica. Parents, especially, ache at contemplating their children's suffering:

*So she left and I'm left here thinking 'She's being eaten by mosquitoes, she's dying of hunger, she's on her period,' because she didn't take anything when she left except two dresses.*  
(Blanca)

*My son suffered so much. He went through so many difficulties because he left without any clothes, and, imagine it, begging for a change of clothes. So many difficulties that they told me happened to him.* (Aurora A)

#### **4.7.6 Being Far Away Makes You Unable to Protect Your Children at Home and Unable to be Present for Significant Moments in the Family's Life**

Two stories stand out from the interviews that merit a somewhat lengthy repeating here. Both of these women were tremendously affected by their experiences. Sharing their stories with me caused tears both for me and for them. Abbreviating their experiences for the sake of space here would not do justice to communicating the impact they both felt.

*I am so sorry about what happened to my daughters. A man who lives here tried to rape my daughters, and I didn't know anything. I was in Costa Rica no more than a month and they called me on the phone and I came home right away. So many things this man did, horrible things to my daughters and my niece. He got into their bedroom. They know him. One time, my older daughter was looking for some beans and he pulled his pants down to his knees, showing my niece everything. My niece got him back by letting us know. We said to ourselves, 'Why does she hate that guy so much?' and he even made my daughter cry. Well, my sister found him in the house and my little girl told us that he grabbed her tight and was touching her face. Finally she vented and finally let it all out what had happened with him. I went to the police and after, he still came by. He tried to get in again. He said, 'Call the police and I'll just sit here waiting for them. Sure, call them.' He knew they weren't going to do anything. This all happened when I came home from Costa Rica. I went to his house and I made a big fuss because the police had only chased him away from here. I went to the police and they said that if he does it again or comes by again they'll arrest him. He hasn't come by again. I feel so bad because I left my daughters imagining that nothing would happen to them. So I say I will see how to get ahead from here with my daughters. I mean it. I'm not going back. Even if my daughters and I only ever eat beans, I will always be with them.* (Ana Cristina)

*Something that happened that pained me deeply was the death of my brother. She [my boss] wanted to go to the US with her husband two days before he died. I had stayed alone in the house with the baby and the maid. When my daughter called me, she said, 'My uncle died.' I remember I said to her, 'My girl, what do I do? What do I do? I'm alone with the baby. What do I do?' I couldn't do anything. They were somewhere in the States and I couldn't leave the baby alone, I couldn't. It was my responsibility, I told myself, and I couldn't leave that baby. I could have. I would have left him with an aunt. But I told her, and if she had wanted to help me, she would have said, 'Luisa, go, we'll take care of the baby,' but she didn't say that to me and I didn't say anything else to her. One of the baby's aunts was there, but the señora didn't say, 'If you want to go to Nicaragua, go, and we'll take the baby home.'*

*That family didn't say anything to me, and I couldn't get in touch with them in the States. I tried, but I couldn't. So my brother died and they buried him. He died at the beginning of November, and I came home on the 31<sup>st</sup> of November to only memories. That was hard to take while I was there, that in finishing my work, I had that catastrophe in my family and I couldn't be with my brother. (Luisa)*

#### **4.7.7 Women Suffer Overwhelming Feelings of Pain and Sadness**

As can be seen from many of these women's stories, the migration experience is full of feelings of profound sadness and suffering. This sadness can be infectious: *What sentimentally affects one, especially depression, affects the other too.* (Lorena) This comes across in an overwhelming way when taken as a whole. Participants poignantly and directly expressed these feelings.

*I really don't know if it's something psychological, but I suffered a lot there, in the sense that now I don't have the same happiness that I had before. Maybe it's because I'm the youngest and I've always had my parents at home. I've never suffered like I suffered there, not protected by anyone. (Janeth)*

*In getting established in that country, I suffered. Like when news from here in Nicaragua, or around Christmas time, whoosh, that was something tremendous [crying]...when I heard a Nicaraguan song...it's hard. It's little things, simple things. When I would eat, I always cried because I said, 'I could be eating with my children.' ...you feel sad, very sad. (Luisa)*

#### **4.7.8 Documentation**

Another negative aspect of migration is documentation. The process is cumbersome and costly and migration's causes make it difficult to go as a documented person (legally). Many decide to forgo the difficulties, but in doing so risk their personal security in order to avoid the authorities. The *Red de Migraciones* is making a concerted effort to change the language of migration away from criminalizing those who do not document themselves. They have worked hard to reinforce the understanding that labour migration is not a crime, and to educate migrants about their rights; yet, as one participant noted, there is still a lack of knowledge.

There is a severe lack of education about what one needs to self-document, and how to do it. The requirements of documenting oneself are part of this problem. The process is very bureaucratic and has many costs in terms of money, time, transportation, food, and possibly lodging. In order for a Nicaraguan to go as a documented person to Costa Rica, she must hold a passport and either a *salvoconducto* (allowing 30 days for passage through any Central American country) or a visa, which is the equivalent of a 30-day tourist permit. In order to obtain a passport a person must show both a birth certificate and a national identity card (*cedula*). This in and of itself can be difficult because the process of being issued an identity card does not take place at the hospital at birth. Parents have one year from the time of birth to register their children. Registration means going to the Supreme Electoral Council in Managua to put one's child's name in the civil registry, incurring time and money costs for those outside the capital. This is not the same as getting a birth certificate. While a person can get a birth certificate at that time, it is a separate process from entering a name into the civil registry. Birth certificates can be obtained from a number of sources, but the cost is US\$6 if the name is in the civil registry and US\$29 if the name is not. Birth certificates are required to obtain a *cedula*, which is free (but can take months to be processed). Keeping documents (like birth certificates) in a secure location away from damage can also be difficult with high humidity and the challenge of pest and insect control. The only secure place to obtain a passport is the migration office in the capital city of Managua, again requiring travel time and money expenses. Application forms themselves cost money along with the fee for the documents. The cost of a passport is approximately US\$25 (C\$400) and the cost of the *salvoconducto* is approximately US\$5 (C\$70). Visas are US\$20 and not advertised in *córdoba* prices. For a Nicaraguan, there is no difference between the two except the price. Getting enough money for documentation can be a burden. Many borrow it from a variety of sources. Many others forgo the



difficulties, and decide to go undocumented or ‘wet,’ but sometimes must still pay for *coyotes*, or people smugglers. (While I heard stories during my fieldwork of people who had used *coyotes*, none of my participants had any experiences of that sort.) The *salvoconducto* or visa is only good for 30 days. After this time, a person becomes undocumented and can be deported. Being documented is a great benefit, while the dangers of being undocumented, crossing the border and living in Costa Rica are many.

#### **4.7.8.a Crossing the Border**

Stories of crossing the border into Costa Rica without the proper documentation involved arduous circumstances.

*My daughter went undocumented and she said that her money didn't last for the whole trip, so she said she had barter to sell her pants to a friend. She crossed the border on a boat and she said it was over full with people and that she threw up because she was so dizzy. She was begging God to get her through. (Flora)*

Obtaining the proper documentation to get in makes border crossing much easier, but overstaying one's time requires returning to Nicaragua in a covert way in order to avoid the Costa Rican police who patrol the borders looking to catch undocumented Nicaraguans.

*I went to Costa Rica 15 years ago. I went with my salvoconducto for one month, but the truth is I stayed three months. It cost me a lot to leave Costa Rica because I didn't have the right papers to leave. We had to cross the river at the path and we were mosquito food. Our legs were covered in sores and suddenly a patrol comes across us and threatened us. They said if we wanted to cross, we had to pay. If not, they would deport us. Between 10 of us we got together about \$400. We got across, but without even five cents to our names. You don't know what can happen if they catch you and turn you in. They say that they rape people; they hit them. (Blanca)*

#### **4.7.8.b Living and Working Undocumented in Costa Rica**

Part of the benefit of being documented in Costa Rica is that *if a person doesn't like the work at least has the option of looking for another job, whereas an illegal person has to be hidden away there because if you go out they'll catch you.* (Lorena)

There is a serious threat of being caught by Costa Rican immigration and police authorities that undocumented migrants keenly feel, and with reason:

*It was the first time I ever went out by myself and the first time I ever got lost. I was going to the migration office and they stopped me, asked for money, and luckily I had some, so I paid them. After I paid them, they stopped me again. I was so angry inside, but I didn't say anything.* (Janeth)

Even obtaining the proper documents to legally reside in Costa Rica, does not guarantee the same in employment situations. One participant encountered resistance on the part of her employers to do the necessary paperwork even though she was otherwise documented and well paid to do her job (i.e. there seemed to be no overt attempt to exploit her labour).

*One thing they never gave me was a labour permit. I struggled for them to give me one, but they had to go to the migration office with my passport and say I was working for them so that migration officials wouldn't bother me. Thank God migration never bothered me. They say there that it's rare that they harass people of my age. Everyday I went by the police but they never said to me, 'Give me your passport; give me your papers.'* (Luisa)

#### **4.8 Is it Worth It?**

Many question whether the economic benefits of migration are worth the emotional costs. Some even doubt if the economic benefits of migration to Costa Rica are themselves that great, and feel that they are diminishing: *The situation in Costa Rica is not the same as it used to be. I can't earn as much.* (Angela) Sometimes people find themselves in the same situation as in Nicaragua.

*The Costa Rican currency is worth less now and it's almost not worth it to work there anymore. In Costa Rica we're starting to find ourselves in the same situation as Nicaragua.* (Aurora B)

Some people feel exploited as labourers: *In general, as a Nicaraguan immigrant it's hard to find work, and if you have a job you are excessively exploited.* (Janeth) And not everyone feels that you can go there to get ahead:

*My mother told me that this December she wasn't going to come home because she's thinking of another place and thinking of saving money. She definitely wants to come home, although it's to buy a little plot here. But she's never going to be able to buy the house.* (Lesbia)

For those that have had success, it seems that migration is the only option to meet their needs. The negative economic and social conditions in Nicaragua can only be mitigated if someone is migrating (working abroad). When migration stops, people find themselves once more in the same conditions as what caused them to go in the first place.

*Yes, my life got better. Do you know why? Because when I came back here, my brothers decided to go to the United States to work. Thank God they got there and they are working and sending money to help me.* (Leticia)

*I had to mortgage my house again. I had to do it again to pay for my son's operation. Insurance doesn't cover it. 'Now I tell my older ones, 'Well, there's no other alternative. Either you go, or I go so we can save our house.'* (Aurora B)

The total cost of migration in all senses is very high.

*Definitely your suffering and the sacrifice of the other person don't cancel out or make up for lost time. The one peso more that you earn is not going to get back the love you've lost with your child, the love of your family, the husbands that have left their wives.* (Lorena)

Some found it difficult to say with certainty that advantages outweigh benefits or vice versa.

*For me, I don't know where the better place to be is. Here there's no work, there's nothing. We don't have a future but if you leave your kids, you don't know what will happen to them.* (Ana Cristina)

#### **4.9 Section Summary**

Several main themes emerge from this data. There are personal and structural causes of migration that involve immediate crisis and need as well as future desires. Similarly, participants explained why these causes exist in personal (albeit self-blaming) and structural terms. In addition there are particularly gendered ways that women experience

migration. Migration has both positive and harmful effects. Positive effects dealt most directly with the economic benefits of remittance. Negative effects were numerous and focused on family separation and the emotional suffering it caused. While the question of whether the sacrifice is worth the price is really left hanging, there are indications that emotional costs may outweigh the economic benefits in many cases. The data revealed rich information about how participants are affected by globalization-induced labor-seeking migration from Nicaragua to Costa Rica. Responses were poignant and evocative, providing both descriptive and analytical perspectives by way of both interviews and group activities.

#### **4.10 Introduction: Structural Adjustment and Poverty Reduction and Growth Agreements (Globalization in the form of neoliberal economic plans)**

Most of the women's experiences of migration start from economic causes (poverty, debt, unemployment, lack of opportunity), which are compounded by culturally held notions of motherhood and maternal care. On a structural level, the context of the economic causes can be linked to processes of globalization (free trade, neoliberal economic policies). National restructuring has created an environment in which Nicaraguans in economic desperation find it necessary to search elsewhere for labour and employment opportunities, negating the possibility of characterizing migration as a completely individual decision.

This section will elaborate on the content and context of the Nicaragua - IMF loan agreements, and examine their impact on the 'push' for migration. A presentation of their conditionalities will be accompanied by an examination of the theoretical rationale and arguments surrounding them. Supplementary information on their actual implementation will be given along with a general picture of their impacts by way of a table of

macroeconomic and social indicators. As well, reflections from primary and secondary sources will be provided to maintain the context of their impacts on gender and health.

#### **4.10.1 Structural Adjustment Policy Agreements**

As the Literature Review recounted, Nicaragua faced a number of economic crises (shared with many low-income countries) in the 1980s due to oil price shocks, declining global commodity prices, profligate lending of ‘petrodollars’ by rich country banks and interest rate surges, all of which gave rise to a ‘debt crisis.’ These economic/debt crises led to interventions by the international financial institutions, especially the IMF in Nicaragua, which attached to their loan agreements numerous macroeconomic conditionalities. In Nicaragua's case, these agreements came a bit later than in other low-income countries, a result of the turbulence created by the Sandinista revolution and the efforts to undermine it by the US-backed *contras*, eventually leading to an electoral defeat of the Sandinistas and entrenchment of a conservative government in 1990.

A critical examination and analysis of the economic philosophy behind these agreements, specifically in understanding the strategy of poverty reduction, was undertaken by Hansjorg Herr and Jan Prieue of the Berlin School of Economics (10), who reviewed Chapter 6 of the Poverty Reduction Strategy Paper (PRSP) sourcebook from the World Bank. This sourcebook, which underpins both World Bank and IMF loan and grants agreements with developing countries, is entitled “Macroeconomic Policy and Poverty Reduction.”

The sourcebook makes clear that economic growth is the key to poverty reduction and that improved allocation of resources is *the engine of growth and* poverty reduction, claiming that

Growth associated with progressive distributional changes will have a greater impact on poverty than growth, which leaves distribution unchanged. Hence policies that improve distribution of income and assets within a society...will form essential elements of a country's poverty reduction strategy (128, p3).

Conditions for such growth require particular macroeconomic policies, what the source book calls "a stable macroeconomic framework" (128, p19). Herr and Priewe agree conditionally about the relationship between growth and poverty reduction, but diverge with the sourcebook on its simple causal explanation. In addition, they question the assumptions of the sourcebook's economic philosophy, noting that its propositions are highly controversial in economic discourse (10). From this unstable base comes a poorly defined and limited understanding of the concept of macroeconomic stability which Herr and Priewe argue is too far removed from reality to truly affect growth. They outright reject the sourcebook's answer of structural measures to effect growth (10). According to the sourcebook, "In most cases, sustained high rates of growth also depend on key structural measures such as regulatory reform, privatization, civil service reform, improved governance, trade liberalization, and banking sector reform" (128, p2). Herr and Priewe also make many observations that employment and labour market strategies are lacking in the sourcebook.

Results of the document analysis of IMF's agreements under its Enhanced Structural Adjustment Facility (ESAF) (the IMF division that administered loans to low and middle income countries) and the Poverty Reduction Growth Facility (PRGF) (which the IMF renamed the ESAF in 1999 to distance itself from critiques of the neoliberal conditionalities associated with the term 'structural adjustment) reveal a program completely in line with the sourcebook's rationale.

*Italicized quotes come directly from the text of the agreements.*

#### **4.10.1.a Broad Goals**

The evolution of the focus of the agreements can be seen through their stated objectives and goals (71,118-121). The first seven years could be described as ‘Neoliberalism on steroids’ due to their hard line implementation of the classic prescription (privatization, liberalization, and deregulation) to restructure and reorient the economy. There is a clear shift beginning in 1998 to move away from more a forceful adjustment toward a more tempered approach focusing on reforms with poverty reduction in mind, especially so in 2002. The IMF officially switched courses in 1999 to PRGF loans and a Poverty Reduction Strategy Paper (PRSP) requirement while Nicaragua was still under the 1998 agreement. This explains why it was not until 2002 (at the expiry of the 1998 agreement) that a major shift in IMF loan conditionalities for Nicaragua occurred. Leading up to the 1999 change was a large outcry by international NGOs and advocacy groups including Oxfam and Jubilee 2000 to abandon the ESAF model due to its fiscal austerity, failure to account for its social impacts, and externally imposed conditionalities. Their arguments claimed that the programs were failing the poor. In addition, an external evaluation in 1998 commissioned by the IMF revealed some similar weaknesses. These external forces account for the more nuanced approach taken by the IMF in 1998.

In 1991, the objectives were simply stated: *to lower inflation to single digits and strengthen the balance of payments so as to create conditions for real GDP growth of 3-4 percent by 1992*. By 1994, more detailed plans were outlined:

- *Consolidate stabilization gains by intensifying structural reform required for the functioning of a competitive economy and moving further toward external viability (defined as a decline in debt-service burdens and reduced reliance on exceptional financing--that is, arrears, debt rescheduling, and official balance of payments support) (129).*
- *Emphasis placed on appropriate climate for private investment and expansion of employment in productive activities.*
- *Reduction in size of public sector.*
- *Improve living conditions.*

- *Sustained growth in real per capita income of 1 to 1 1/2 percent by 1996 (with real GDP growth of 2% in 1994, 3% in 1995, and 4 1/2 to 5% in 1996)*
- Reduce inflation to single digit levels over same period

A partial shift can be seen in 1998 with the importance placed on intentions *to alleviate poverty and reduce unemployment through sustained high rates of economic growth, focused social policies and progress toward macroeconomic stability*. With the focus placed on poverty reduction, less detailed objectives followed, possibly reflecting the transition period of the Fund itself. The program for 2002 was developed fully within the new framework, proposing *the long-term goal of permanently eradicating poverty*. Although the stated objectives were again general, this time there was a well thought out rationale behind them: *provide a proper stable macroeconomic framework to foster growth in a context of low inflation and expand job opportunities to all Nicaraguans, mainly through private sector investment, production and exports*.

#### **4.10.1.b Conditionalities**

The core of these programs is seen in their conditionalities. Again, the earlier years (1991-1998) are marked by austerity and a somewhat checklist approach to requirements following the privatization, liberalization, deregulation formula. More broad reforms are the characteristic features in the two most recent agreements (1998 and 2002) although in some senses the 1998 agreement still follows the checklist approach. The social implications for these conditionalities have been huge.

#### **4.10.1.b.i Privatization Requirements**

The privatization program began in 1999, enduring even until 2002. It encompassed nearly all facets of the economy: all state-owned enterprises, fisheries, the banking and financial sector, telecommunications, transportation, port services, the energy sector, mining enterprises, the agricultural sector, and some education and health services. As



mentioned previously, a well-known effect of privatization is a quickly following high rate of unemployment. Complaints of unemployment and the inability to find decent work is a leading push factor for migration.

A privatization law was passed in 1994, and all new regulations gave economic priorities to private investment. In particular, the privatization of the banking and agricultural sectors combined to produce disastrous results for small agricultural producers. While credit restrictions were a first blow, the closing of local branches and the privatization, and finally closing of extension (technical) services in rural areas was devastating. This was especially so for former soldiers who had been given land in the changeover to a peacetime economy, but who had no farming experience. Making a bad situation worse, the state-owned grain marketing board was privatized and grain prices dropped (130). Chavez-Metoyer interviewed men and women about these changes and found that women discussed how their families were affected, whereas men talked about changes to their economic position in relation to the market (19).

In education, privatization of services led to large dropout rates due to user fee requirement, representing structural discrimination against investment in female human resources. Indeed, many of the research participants had low levels of education and little opportunities to study. Given that under the Sandinista government, illiteracy had been reduced from 50 to 12 percent, this change undermined the gains made in the 1980's (84). In health, gains made under the free program of the Sandinistas in infant mortality and prevention programs against malaria, dengue and cholera began to reverse themselves due to the drop in government spending and inaccessibility of now private and expensive health services (84) (See Table 1). Women's roles as caregivers and a retreat of state support means that they have assumed this burden as extra, unpaid work (19).

#### **4.10.1.b.ii Liberalization Requirements**

The liberalization conditionalities moved to open trade and market operations as much as possible. Import protections (tariffs, or duty taxes) and export subsidies were virtually scrapped. Non-tariff barriers to trade (such as quotas on the volume of particular imports) were eliminated. In 1998, reflecting and promoting the growth of free trade zones, firms producing for export had duty free access to imported machinery, equipment, and intermediary goods through regimes of either temporary entry or export processing zones. All directed credit policies, including those aimed at small farmers and local business, were eliminated and open market operations were begun in 1995 as an instrument of the Central Bank for monetary control. This allowed for more free movement of capital. While all Nicaraguans were affected by credit restrictions, women were hit especially hard because there are more poor women than poor men in Nicaragua (19).

#### **4.10.1.b.iii Deregulation Requirements**

The essence of these conditionalities was to continue to reduce state regulation of the economy as much as possible. In 1991, price controls were removed from all but bus fares, petroleum products, public utility services, and products subject to excise tax, including the cessation of setting of support prices for certain basic grains by the end of 1991. The privatization efforts eventually eliminated price controls on public utilities and petroleum, along with the sale of state-owned enterprises in those sectors. The government maintains a minimal subsidization of transport costs which is protested every year, especially by university students and bus owners, as being far too small. Deregulation is another tool used to stabilize inflation. However, it leads to a government's declining ability to promote structural change since it takes a hands-off approach. Women are

intensely vulnerable where there are no protections built-in, such as is established with deregulation.

Foreign investment laws and regulations were revised by late 1998 in order to improve the environment for private sector activity, and new labour codes allowed temporary contracts to help reduce entry/exit barriers, reduce severance payments, establish more balanced regulations on strikes that protect interests of workers and owners, and gave power to the Ministry of Labour to pronounce on the legality (more accurately, the putative illegality) of strikes.

#### **4.10.1.b.iv Shrinking of the Public Sector**

Along with the above conditionalities, the public sector was drastically reduced through layoffs (including military personnel), streamlining of 16 ministries and 20 government agencies, and withdrawal of state involvement in infrastructure provision and agricultural support. Between 1990 and 1993, 183,000 people had been laid off due to privatization, public sector layoffs, and downsizing of the military. Between 1994 and 1999, a voluntary retirement program removed a further 17,800 positions. The newly restructured labour market was unable to absorb so many workers all at once and unemployment drastically increased overnight. As Table 1 shows, the overall picture of under- and unemployment has only worsened since this time, and interview data bear out the widespread experiences of participants and their family members in the difficulty of finding a job.

A short-term effort in the mid-1990's by the Ministry of Social Action to mitigate massive unemployment created 160,419 temporary jobs (although it is unclear if there were actually the same number of employees) (84). Compensation for this work was very poor and was paid out in one of the following: *córdobas*, *córdobas* plus a food stipend, or only the

food stipend (84). The majority of workers were on the food-for-work plan. This effort was crisis-based and temporary, which only served to increase economic inequality, hinder reform, and damage local agricultural markets (84).

#### **4.10.1.b.v Currency Devaluations**

Enormous inflation in the late 1980's and early 1990's (up to 33,000 percent) caused significant economic instability. To combat this, the old currency was massively devalued by 400% in 1991. At the same time a new currency (*córdoba oro*) was introduced at par with the US dollar, followed by devaluations of C\$1 to C\$5, then to C\$6 per US dollar. An annual depreciation of 5 percent was initiated, which accelerated to 12 percent in 1993, and finally a crawling peg system thereafter, which is currently maintained. The scheduled devaluations and exchange rates are published by both the Central Bank and mass media. The massive devaluation in 1991 of the old currency served as an incentive to discontinue its use. The constantly devalued new currency is what affects debt servicing costs (as the currency is devalued, debt service is more expensive since loans are made in US\$).

Participants in my study keenly feel the effects of devaluation on a constant basis. A common complaint by both participants and Nicaraguans on the street is the never-ending price increase on almost all basic necessity items. Wages do not often rise to account for the devaluation. Women are hit hard in a number of ways. Women heads of household are usually single mothers and will provide for their children first before tending to their own needs. Women who are not heads of household do not often control the household finances and men spend more of their share of income on themselves than women. Thus an ever-smaller share of men's incomes is going toward household costs, which are steadily increasing.

#### **4.10.1.b.vi Payment Requirements (Debt Service)**

Nicaragua's debt situation at the beginning of the 1990's was one of the worst in the world, with external debt reaching over US\$11.5 billion in 1994. This was the *raison d'être* for the entry of the IMF into Nicaragua. In addition to structural reform, requirements were made of the government to confront its debt problems and follow a program of manageable scheduled payments.

In 1991 the government requested a rescheduling of most of its arrears and current debt service: a total of US\$3.1 billion. A constantly devalued currency contributed to difficulties in servicing the enormous debt. Nicaragua was not allowed to incur new arrears within the 1994 program period. A total of US\$590 million in cash debt service payments was required between December 31, 1993 and June 30, 1995. In 1998 the program called for pursuing grants and highly concessional loans to cover external financing requirements. (A concessional loan is one that has very low or no interest charged on it.) The 1998 program also required Nicaragua to secure comprehensive rescheduling of eligible debt on Naples terms (up to 67% cancellation of existing debt) from Paris Club creditors (a formal network of 19 high income countries) and to pursue similar agreements with non-Paris club creditors for debt and debt-service reductions. The program period (1998-2002) required a total of US\$724.4 million in debt service obligations, after debt rescheduling (debt rescheduling is essentially deferring debt service obligations on some portion of the total debt into a future time, without adding additional interest penalties).

Priority for debt payment was put ahead of all others, while poverty and unemployment grew. The Nicaraguan government's ability to address key development strategies and issues has been severely curtailed due to the emphasis on debt payment, and women's subjugated positions in society and the economy have not improved. Some

participants strongly criticized the government for a lack of support and leaving them feeling unprotected.

#### **4.10.1.b.vii Spending Limitations/Caps**

In order for a heavily indebted poor country, such as Nicaragua had become, to meet its debt payment requirements, strict spending limits are placed on the government. The checklist formula can be seen in the 1991-1998 period. The lists below come directly from the agreement documents. These limitations severely hamper a government's ability to mitigate the negative social effects of conditionalities. Some of this can be seen from data presented in Table 1. Unless otherwise stated, the assumption is that these conditions were implemented.

1991:

- *Total central government expenditure (including external interest payments) is to be contained to C\$1,840 million in 1991. In 1992, total expenditures are to be held to C\$2,450 million (equivalent to US\$375 million or 20% of GDP).*
- *Public sector wages to be restrained for the remainder of 1991 and wage adjustments will be limited in 1992 to between 10 and 12 percent. (While inflation in 1991 was still very high, introduction of the new currency stemmed this problem by the next year as can be seen in Table 1. The restriction on public sector salaries, then, while onerous, did not overnight drastically impoverish the people affected by the wage salary cap.)*
- *Outlays on goods and services to be closely controlled.*
- *A prudent public sector wage policy is central to the success of the program as it should contribute to the moderation of wage adjustments freely negotiated in the private sector and thus strengthen the conditions for the recovery of employment and output.*
- *The government will not impose new, or intensify existing restrictions on payments and transfers for current international transactions; introduce new multiple currency practices; impose or intensify existing import restrictions for balance of payment reasons.*

1994:

- *Freeze on public sector wages and salaries (with the exception of selective adjustments for a small group of Central Government employees) (Given the wage caps required in 1991 and a greater than 12% inflation rate in 1994, this was a further blow to public sector workers' earnings capacity.)*

- *Containment of wage expenditure and pension payments.*
- *Lowering of expenditure in some ministries, defense and general services and administration.*
- *Review total education expenditure, giving priority to primary education and reducing subsidies to secondary and higher education.* (While there are some potentially very strong health and gender equity gains in ensuring universal access to primary education – which this conditionality does not call for, only to give funding priority – there are long term economic development/growth losses in under-subsidizing investments in human capital formation via secondary and tertiary education)
- *Reallocate expenditure from wages and salaries to operation and maintenance* (This was given as a general demand, presumably meaning in all ministries. It complements calls to freeze public sector wages and promotes supposed efficiency.)
- *Reduce operating costs of two state banking institutions Banco de Nicaragua and Banco Nacional de Desarrollo (National Development Bank).*
- *Reduce severance payments to public workers.*
- *Limit of C\$2,521 million Central Government expenditures in 1994.*
- *Limit of C\$1,323 million Central Government expenditures through June 30, 1995.*
- *Limit of C\$621 million on net domestic financing of combined public sector in 1994.*
- *Limit of C\$72 million on net domestic financing of combined public sector through June 30, 1995.* (These latter two points refer to the extent to which Nicaragua could borrow domestically to finance its public sector spending)

1998:

- *Tax incentives to promote nontraditional exports in the form of negotiable tax certificates are ended.*
- *Current outlays of central government are to be reduced by 4 percentage points of GDP by 2000.*
- *Capital outlays and net lending of public sector are to be reduced to 12.5% of GDP by 2000.*
- *Maintain expenditures in health at 4% of GDP in 1995-6 and 5-6% of GDP in 1998-2000.* (Health spending has never even reached 6% in Nicaragua. This conditionality is appalling considering major shareholding countries in the IMF such as the US and Canada spend approximately 14.6% and 10.1% respectively of their GDPs on health. It is also inexcusable considering that the burden of disease in low-income countries such as Nicaragua compared to these countries is much higher.)

Low wages, economic barriers to accessing education and medical care, and low social spending, as the participants' stories reveal, are major factors that create push conditions for

migration. Women's culturally understood positions in society and the economy make them vulnerable under these conditions. As can be seen from this list, the IMF stipulated implementing such conditions as part of loan agreements, creating the structural conditions for migration and its resulting health consequences.

#### **4.10.1.c Poverty Reduction Efforts**

While not the official focus, the 1991-1998 programs also included efforts at poverty reduction. Endeavors included the creation of the Social Emergency Investment Fund (FISE) and its food-for-work programs, resolving land titling issues, social security reforms, externally financed poverty alleviation programs, improved provision of basic education and health care services, with a focus on reproductive services, and a small increase in social spending. No early efforts directly acknowledged gender in any way other than in a reproductive capacity. In fact, in 1991 a simple prescription of *strong financial policies* was considered adequate to *bring about a rapid decline in inflation and halt the erosion of earnings of the most vulnerable groups while arresting the deterioration in the social conditions.*

#### **4.10.2 The New PRS Approach 2002**

The new PRS approach, which yielded PRGF loans, PRSPs and entry into the HIPC (Highly Indebted Poor Countries Initiative) started in Nicaragua in 1999. Successful interim and final PRSPs allowed Nicaragua to reach the HIPC completion point in 2004. Under this program, approximately 73% of debt has been forgiven (89). See the Discussion Chapter for more on this process.

The 2002 PRGF loan agreement dropped its checklist approach to focus on sector-wide reforms. Targeted sectors are the national financial system, the public sector, and governability and transparency. Structural reforms have affected health and social spending



and, in an egregious intrusion on national sovereignty, virtually required entry into the Dominican Republic and Central American Free Trade Agreement (DR-CAFTA) with the United States. The timing of entry into the HIPC and ratification of the CAFTA agreement were closely associated, with a tacit understanding that a favourable report from CAFTA negotiators would positively benefit Nicaragua's case with the IMF (131). Requirements to maintain privatization, liberalization and deregulation conditionalities are embedded within these reforms.

#### **4.10.2.a Structural Reforms**

Some important requirements that have implication for health include:

- *Maintenance of macroeconomic stability through satisfactory compliance with the agreements contained in the Poverty Reduction and Growth Facility (PRGF). (Chapter 6 of the PRSP Sourcebook)*
- *Increased social spending in education and health, with protection for the most vulnerable population groups. (The details are vague, but have the Millennium Development Goals in mind.)<sup>3</sup>*
- *Approval of a general health law to strengthen the regulatory and normative roles of the Ministry of Health, and to establish a solid legal basis for the program for the modernization of that sector, granting more autonomy to hospitals and local health systems.*
- *Adoption of an action plan for introducing an effective social protection program, based on the results of the pilot program begun in 2000.*
- *Poverty-related expenditures to reach about 17% of GDP by 2005 including: poverty-reducing expenditures and public investment in infrastructure and human capital*

#### **4.10.2.b National Financial System Reforms**

These reforms focus mainly on banking norms and attempts to establish transparency and efficiency in the banking sector.

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<sup>3</sup> In the year 2000, eight goals, known as the Millennium Development Goals, were adopted by all world governments. The goals range from halving poverty to halting the spread of HIV/AIDS and providing universal primary education. The target date to reach these goals is 2015.

#### **4.10.2.c Public Sector Reforms**

The focus in the public sector is on tax reform, establishing new regulations for Central Bank financing, and inaugurating a new pension system.

#### **4.10.2.d Governability and Transparency Reforms**

These reforms call for a reform of the Civil Service Law that would promote efficiency by pairing the skill profile of personnel with competencies required for each position (possibly in contrast to practices of cronyism); a new management and inspections system for government bidding; a technological modernization of the Comptroller General's office; and a strengthening of the Judicial Branch based on recommendations made in 2002.

#### **10.4.2.e Women's Place in PRSs**

Around the same time as the switch to PRSs, gender equality also came to be officially acknowledged as necessary for economic growth. Attention to increased social spending, a social protection program, and poverty reduction spending indicate a commitment to address gender. This shift, however, seems to see gender in terms of its efficiency rather than an element for equity (132). "Such an approach may use women to gain macro level growth goals, while not improving women's micro level situations, or while reducing their well being, as was the case with the Structural Adjustment Programmes of the past" (132). It is important to recognize that women's relative poverty is a social and not just economic experience, which means that improving the economic situation will not automatically address all aspects of poverty for women (132).

Participants did not indicate any difference in their experiences from under SAPs from that under PRSs other than to indicate that some aspects of migration to Costa Rica

are harder now because so many more people are going. Although gender has been officially acknowledged, women's experiences do not seem to have changed, possibly another example of the cultural recalcitrance described by Whisnant.

Table 1. Macroeconomic and Social Trends in Nicaragua while under IMF Programs (see Appendix B for list of sources)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Population	3,937,367	4,054,375	4,174,860	4,298,926	4,357,099	4,548,755	4,674,199	4,803,102	4,935,559	5,071,670	5,205,022	5,341,833	5,482,340
Population growth (%)		3	3	3	1	4	3	3	3	2.7	2.6	2.6	2.6
GDP (millions of US\$ - 2000-4 in constant 1990 prices)	1,604.6	1,792.8	1,756.3	1,780.9	1,840.1	1,920.9	1,968.8	2,067.8	2,212.4	5,028.0	5,177.0	5,230.0	5,351.0
GDP per capita (US\$)		442.2	420.7	414.3	415.7	422.3	421.1	430.6	448.6	797	798	776	785
Inflation rate (%)	865.6	3.5	19.5	12.4	11.1	12.1	7.3	18.5	7.2	9.9	4.7	4	6.5
External debt (millions of US\$)	10,313.0	10,743.1	10,987.0	11,695.0	10,248.4	6,094.3	6,001.0	6,287.1	6,548.9	6,659.9	6,374.2	6,362.6	6,595.8
External debt (% GDP)	593.1	585.4	609.5	638.4	541.8	308.5	296.4	295.7	296	285.4	155.4	158	159
Debt per capita (US\$)	2,616.1	2,661.8	2,633.6	2,720.5	2,352.1	1,339.8	1,283.8	1,309.0	1,326.9	1,313.2	1,301.5	1,191.1	1,203.1
External debt service (millions of US\$)					405.5	335.8	450.9	318.6	292.6	313.3	179.8	184.4	101.4
Unemployment rate	14.0	14.4	17.8	17.1	16.9	15.9	14.3	13.2	10.7	9.8	10.7	10.7	11.7
Underemployment rate	14.9	13.8	13.1	12.2	11.8	11.6	12.2	11.6	12.3	33.1			35.9
Poorest 10% consumption							1.3	0.7			1.2		
Poorest 20% consumption				4.2			4.5	2.3			3.6		
Richest 20% consumption				55.2			51.3	63.6			59.7		
Richest 10% consumption							35.4	48.7			45		
Gini Index			58.2				58.4	60.3			55.1	57.9	
Poverty rate (nat'l poverty line % of population)			50.3					47.9			45.8		
Poverty in absolute numbers (thousands)			2,104.5					2,303.9			2,385.5		
Literacy Rate (%)	81		65		65.7		63.4	67.9	68.2	66.5	66.8	76.7	76.7
Combined primary, secondary, & tertiary gross enrollment ratio (%)	53		61	62	64		63	63	63	63	65	65	69
Education spending (% GDP)	4.8	4.7	4.4	5.0	4.0	4.6	5.1	4.9	6.6	6.3	6.5	3.1	
Life expectancy at birth (years)	66.1	66.1	67.1	67.3	67.5	68	67.9	68.1	68.1	68.4	69.1	69.4	69.7
Infant mortality rate (per 1,000 live births)	48.1	48.1	50	48.1	48.1	44	43	40	38	37	36		30
Maternal mortality rate (per 100,000 live births)	150	91	98	88	106	125	121	106	118	98	107	97	93.7
Health spending (% GDP):	4.2	4.2	3.9	4.4	4.1	4.4	4.1	3.8	5.4	5.1	5.5	3.9	
per capita (PPP \$US)								266			158	206	
Remittances (millions of US\$)				50	75	95	150	200	345	600			715
Remittances as % of GDP										25		29	

Blank spots in the table indicate areas where data were not available. Overall, I tried to use figures that were most widely published. As much as possible, I tried to use the same source for the variable across as many years as possible.

This table has considerable limitations. Serious data confidence issues require taking some of these figures with a grain of salt. Different official sources often show vastly different results for the same variable. Differing definitions and methods of collecting data can be confusing. Data on poverty levels is a serious issue. The National Statistics and Census Institute (INEC) data, which is what the IMF uses and is provided in the table, shows percentage levels of poverty at 50.3, 47.9, and 45.8 for the respective years of 1993, 1998, and 2001. However, the UN's Economic Commission for Latin America and the Caribbean shows drastically different levels of 73.6, 69.9, and 69.3 for the same years.

The difference between GDP figures in 1999 and 2000 is another good example. In one year GDP and GDP per capita nearly doubled. It is highly unlikely that this was due to economic performance. A more likely explanation is a change in methods of measurement and calculation. A jump in underemployment between 1999 and 2000 shows a similar trend. Conventional wisdom in Nicaragua, however, holds that the new methods are designed to make the poverty situation seem less serious. One example is in calculating the cost of the *canasta básica*, a list of basic necessities. One academic in Nicaragua shared with me that the government over time was reducing the list items in the *canasta básica* so as to show that its cost was going down. Using the cost of the list as of 2001 shows that 72.6 percent of the population cannot cover their basic needs and extreme cases account for a staggering 44.7 percent (65).

Maternal mortality is yet another example where official sources are not likely credible. The 2004 Human Development report published official and adjusted figures for maternal mortality; the adjusted figure representing a more likely picture on the ground, coming from data from UNICEF, the WHO, and the UNFPA, which differed drastically from national sources. In 2000, Nicaragua reported 98 maternal deaths per 100,000 live births. The adjusted figure was 230 per 100,000 live births. Overall, the general impression is that the reported data across the whole table paint a better picture than the lived experience.

Some interesting observations from this table include a relatively high literacy rate in 1991 compared to overall enrollment. The Sandinista government of the 1980s had implemented a literacy program that saw volunteers trained and dispersed throughout the country teaching people of all ages to read. It was very successful. In the first 5 months of the program in 1980 illiteracy was reduced from 50 percent to 12 percent (84). The new government in 1990 axed the program in addition to instituting user fees in education. Literacy rates tumbled as a result. The high literacy rate in 1991 likely reflects the tail end of the benefits of the Sandinista policy. It is interesting as well to note that literacy and enrollment did not significantly increase with increased education spending. This could possibly reflect that most of the spending went to elites, indicating a tertiary emphasis in cities. Because the IMF programs are associated with falling literacy, the self-blame comments of Nicaraguan women being 'stupid' and having large families has a deeper context. Health spending also seems to increase with 1998 reforms, which appeared to urge such increases. There is perhaps a more nuanced and potentially positive health outcome within the program, compared with previous years, reflecting increased maternal/child health spending, and more clinics as in the description of required the reforms. At same

time, health spending starts to fall post 2001/2002, and certainly per capita spending (even in the health high mark year as % of GDP of 2001) is much lower than in 1998, which has a comparatively low % GDP spending.

Falling or steady rates of social spending post-2000 may seem strange given that by that time Nicaragua had reached the entry point of the HIPC and had already begun to receive some debt forgiveness. Nicaraguan economist Nestor Avandaño has documented the forgoing of poverty reduction spending in favour of paying down internal debt, even though the purpose of HIPC and PRS programs is to specifically target poverty reduction (133).

#### **4.11 Section Summary**

Descriptive data from the IMF agreements encompass broad areas of the structuring of economy and society. Undertaking to reform these sectors has been ambitious, indeed! The IMF is right to recognize that former attempts were inadequate. The new PRS approach comes closer to righting these errors of the past. However, generally speaking, while the stated rationale and goals of IMF programs have changed, it seems that the basic prescription for both old and new approaches has not. The original intentions of ESAF programs were to “remove distortions, enhance efficiency, and redirect the role of government in the economy” (129) with the goal of economic stability and viability. According to IMF ideology, the way to do this was to lower inflation and encourage GDP growth by opening markets and promoting private investment. In the PRGF, poverty reduction (and long-term eradication) is the focus. Achieving this goal is to be done, once again, with low inflation, and economic growth promoted by private investment and liberalized markets. A significant shift in the two approaches is the change

in attention to gender. The PRS approach explicitly identifies gender equality as a necessary condition for economic growth. A problem with this point of view is that gender equality is seen as a means to an end rather than an end in itself, which may result in the reproduction of inequity and inequality.

Erroneous and arrogant assumptions (such as the “there is no alternative” or TINA syndrome), combined with small-minded concepts of the social effects of these programs, have produced drastic long-term negative economic and social conditions for the majority of Nicaraguans. These effects have serious implications for health. Many Nicaraguans have attempted to mitigate these circumstances through pendular labour migration. For an analysis of the relationships among these three elements, see the following Discussion Chapter.

Many aspects of the impact neoliberal IMF agreements have had on Nicaragua could be investigated with further research. One such area outside the scope of my research project would be to measure the total impact of servicing foreign debts compared to total health and social spending. Another would be to compare and contrast Costa Rica’s experience with Nicaragua’s. This latter analysis would provide a stronger comparative basis with respect to how two different countries are managing domestically the impacts of globalization on domestic labour markets, economic growth, wealth and income distribution and poverty rates. For purposes of this thesis, the differences in the two countries’ poverty and unemployment rates and average income level, cited earlier, suffice as indicators of the ‘push’/’pull’ for migration from Nicaragua to Costa Rica.



## 5. Discussion

### **5.1 Introduction**

Overall, the results of this study are consistent with those of other larger surveys of Nicaraguan migrants to Costa Rica (65,81). Specifically, the push and pull factors such as poverty, high unemployment and poor job prospects vs. better living conditions, the ability to find a job and work, and to be able to send home money are the same. Migrant participants' description of the social situation of Nicaraguans in Costa Rica is in agreement with other studies, and the impact of remittances is also mirrored.

Gender analyses in other studies reveal similar trends as this study in migration's impact on women. The particular contribution of this study, and the main purpose of this chapter, is to locate these experiences within the context of globalization, using both secondary data sources and the life-stories of women themselves.

The following figure is based on the presentation of results in the previous chapter and the literature review; it models the relationship between neoliberal economic globalization and health and frames the discussion that follows.

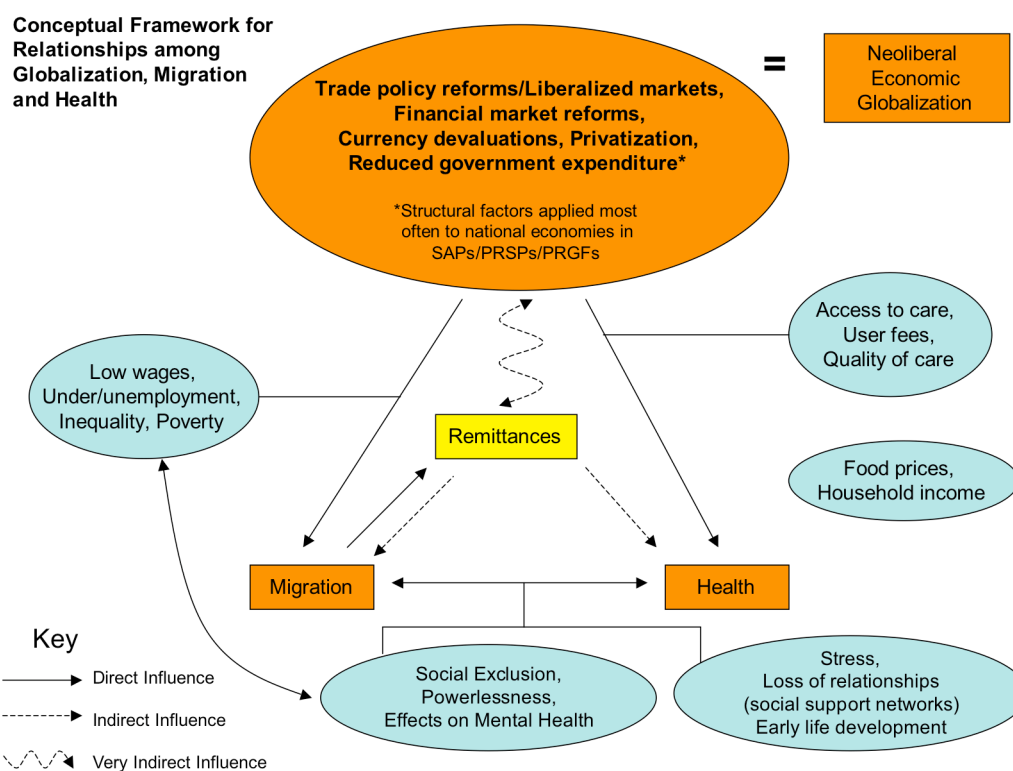


Figure 3

## 5.2 Migration and Health

An understanding of two wide contextual elements, social exclusion and powerlessness, are necessary in order to offer a more complete picture of the effects of migration on women’s health. These two elements are a background and are woven into the discussion of other health determinants that are related to the migration experience.

### 5.2.1 Social Exclusion

Likely the most important dimension that serves to contextualize the Nicaraguan migration experience within the overarching political-economic structure of economic globalization, principally in this study in the form of IMF agreements, is social exclusion.

Social exclusion offers a wider understanding of what poverty actually means on the ground, enriching its meaning beyond simply a synonym for low-income.

‘Social exclusion’ refers not only to the economic hardship of relative economic poverty, but also incorporates the notion of the process of marginalization – how individuals come, through their lives, to be excluded and marginalized from various aspects of social and community life...The term ‘social exclusion’ also relates to cultural aspects of exclusion and discrimination and refers to the relationship between the included and the excluded, the meaning and identity of the excluded. Social exclusion is about multidimensional disadvantage – there is not one ‘social exclusion’ but many ‘social exclusions’ and, as with social class and relative economic deprivation, there are degrees of exclusion (134, p222).

Levels of consumption of calories, electricity, and water as well as educational opportunities, social networks and supports characterize the experiences of the included and excluded. Shaw identifies four aspects of social exclusion (134, p223):

1. Exclusion from civil society through legal constraint or regulation.
2. The failure to supply social goods to a group with particular needs; for example: facilities for the disabled, language services, or accommodation for the homeless.
3. The exclusion from social production, not being able to be an active contributor to society; certain groups may be labeled as undesirable, unacceptable, or in need of control, for example gypsies and travelers.
4. Economic exclusion from normal social consumption – not having access to the normal perquisites, routines, and experiences of everyday life.

If ‘normal’ refers to the majority experience, in Nicaragua, the excluded majority has the normal experience. This, alongside the extreme difference of the minority with high levels of consumption, wealth, and resulting power, however, means that ‘normal’ social consumption is the definition of exclusion. The Gini indices and consumption breakdown between the lowest and highest 10 and 20 percents bear this out. In Europe it has been shown that the processes that lead to social exclusion include economic change (increased unemployment and widespread job insecurity), demographic change (increased proportion of single households, lone parents and elderly), changes to welfare regimes (cuts and withdrawals), and specific spatial processes of segregation and separation (stigmatization

and marginalization of certain groups, often leading to spatial segregation of minorities) (134). Social exclusion can affect a person deeply. Quoting British researcher, Richard Wilkinson, Shaw gives a stirring characterization of what it is like for those on the losing end:

To feel depressed, cheated, bitter, desperate, vulnerable, frightened, angry, worried about debts or job and housing insecurity; to feel devalued, useless, helpless, uncared for, hopeless, isolated, anxious, and a failure; these feelings can dominate people's whole experience of life...The material environment is merely the indelible mark and constant reminder of the oppressive fact of one's failure, of the atrophy of any sense of having a place in a community and of one's social exclusion and devaluation as a human being (134, p223).

In general, social exclusion impedes the acquisition of personal social capital, elements of which include parental socio-economic status and education, parental self-esteem and the degree of family accord, as well as area of residence (135). The combination of personal social capital, along with individual characteristics such as self esteem, coping strategies and cognitive and social skills determine the pathway into adulthood and the subsequent determination of health (135). These characteristics are also determined by degree of social exclusion. As will be described later, early life opportunities and experiences are keys to establishing successful outcomes. Feelings of social exclusion were evident in the results and revealed as dismay at the limitations of economic circumstances: *You have to spend everything you earn here and you just can't get used to it. You really have to stretch yourself as much as you can with what you make.* (Lesbia) In addition, women experienced frustration in attempting just to meet even basic needs.

*With what they pay a domestic here, my children can't eat. There's no salary here. I can't pay for health care for my children because you have to pay for everything here. I've had to stop paying for two of my children to study and I just have two left still in school so that they can at least learn how to read.* (Angela)

### **5.2.2 Powerlessness**

A complementary concept to social exclusion is powerlessness. The lack of control over one's destiny is now understood as a broad-based risk factor for disease. "The expectancy or belief that an individual cannot determine the occurrence of outcomes," powerlessness results in alienation, victim-blaming, learned helplessness, internalized oppression, or hidden injuries (136, p198). Part of the effect of powerlessness is that people begin to internalize their experiences as their own fault, rather than the result of an inequitable system, which produces psychological damage (136). Results reveal that this situation is occurring in Nicaragua: *We have a lot of children and we are single mothers because of "love" and sometimes we are stupid.* (San Marcos). In addition, *that's just how it is* characterizes women's own analysis of why they blame themselves for economic misfortunes that are related to cultural factors such as *machismo*. The basis for self-blame comes from the myth of equal opportunity (136), especially ingrained in neoliberal theory, i.e. the false assumption that a completely free market operates with all starting from the same place with the same opportunities.

Decision-making power and appraisal of one's own situation affect the level of control a person feels they have over their own life. Studies have shown that "interventions which attempt to increase the internal locus of control without changing the environmental conditions may increase frustration and lead to greater perceived powerlessness and ill health" (136, p200). A sense of entrapment and defeat are key factors in the origin of mental illnesses such as depression (69). Adequate resources to affect decision-making power, finances, or system access are critical to influencing feelings of powerlessness. Identified physical and social risk factors for powerlessness include: living in poverty, being low in the hierarchy, being subject to high psychological and physical demands, having low

perceived and actual control (i.e. external locus of control and learned helplessness alongside lack of decision-making, economic, and political power), chronic stress, lack of social support, and lack of resources (136). The results indicate that women, in general, experience these conditions: *Money is what the big politicians have. It doesn't circulate to workers like domestics because they only pay a salary that still leaves you hungry. Where can we go to complain?* (Angela)

### **5.2.3 Migration and Mental Health**

Dinesh Bhugra of the Institute of Psychiatry in London has conducted some of the only recent research looking at macro patterns of migration's effects on mental health (69,137,138). He draws on literature from the 1970s and 80s (when researchers last focused on this issue) and combines it with his own work and analysis.

Migration has a specific relationship to health that weighs heavily on the psyches of migrants and their families. It is a highly heterogeneous process that is a series of events influenced over a long period of time by many factors (69). It is the nature of the push and pull factors that determine the migratory forces, and the responses of both the migrant and those surrounding him or her (69)(68).

Bhugra identifies four stages of migration: premigration, initial stage, middle stage and final stage, each with their own stressors (69). These stressors can exacerbate a migrant's vulnerability, yet factors exist which can help in developing resilience. In the premigration stage, a person's personality, a deficit of skills, being in a situation of forced migration or persecution will increase vulnerability, whereas preparation and a voluntary decision to migrate will help with resilience (69). In the Nicaragua case, almost all migration to Costa Rica, while not forced in the conventional sense, can be considered non-voluntary

since most migrants feel compelled to go out of a sense of survival. For those who decide to document themselves, this process alone can be a significant life event, producing cumulative stress: arranging the visa, the process of transport, and clearing immigration (69). In addition, low levels of education and relatively little access to information on the rights of migrants, necessary documentation, and resources in Costa Rica leave migrants with little or no preparation for their journey. The *Red de Migraciones* is attempting to address the situation with brochures and education sessions on the necessary documentation needed for legal status in Costa Rica and on the rights of migrants.

The initial and middle stages comprise the acts of crossing the border and settling in to the new environment. Stressors increasing vulnerability at these stages include loss (including one's social support network), bereavement, (possible) post-traumatic stress disorder, culture shock, culture conflict, and discrepancy in aspirations or achievements (69). Many aspects of culture shock are reflected in the experiences of participants: strain, sense of loss and feelings of deprivation, rejection by members of the new culture, confusion in role and role expectations, surprise, anxiety, disgust and indignation, and feelings of impotence (69). The lack of social support in these stages "may keep the migrant feeling anxious, confused and angry, which may lead to apathy" (69). Factors that help resilience at these stages include social support, positive cultural identity, and socio-economic advantage (69). It would seem, however, that these resilience factors are hard to come by in the face of feelings of isolation in Costa Rica, especially of domestics: *I felt very bad, very alone, without anyone to talk to. Employers there don't talk to you. They don't want to know how you're doing or how your life is. You're not important to them. They just want you to do your work.* (Aurora B) In addition, there is a gendered demeaning of identity Nicaraguans face in Costa Rica that works against fighting vulnerability: *They say that (Nicaraguan) women just go*

*there to be prostitutes, but in my case that wasn't true. There were a lot of people who asked me if I wanted that kind of work. In no way would I ever accept that kind of work.* (Janeth) This discrimination is felt deeply. During a casual conversation, a woman who had worked in Costa Rica for a time revealed that this reaction to Nicaraguans made her feel *really low; like a worm*.

In the final stage, postmigration, the migrant may decide to permanently reside in their new home and achieve acculturation or assimilation, or they may face deculturation or alienation. While some Nicaraguan migrants decide to become permanent residents of Costa Rica, the majority participate in a pendular back and forth process (see section 4.2.5), making full acculturation or assimilation difficult. Factors affecting vulnerability in this stage (and can lead to mental disorders) include parental separation, low self esteem, discrimination, stress of adaptation, economic or material difficulties, and rootlessness (69). A positive cultural identity, social support, socio-economic advantage, and attachment to family will help with resilience in this final stage (69). Results reveal that these factors seem largely out of reach for most migrants. The one exception may be a strong cultural identity. While not directly investigated, my general observation was that most people I encountered in Nicaragua were proud of their culture (albeit disappointed in their current situation). However, it seems that most migrants don't benefit from strong social support or socio-economic advantage. Additionally, given what the results reveal about family attachment, there are serious implications for migrants' resistance to vulnerability. Descriptions of the loss of family coherence and suffering especially while separated from one's family indicate that this factor may be out of reach during periods of separation, when migrants need their family's support most.

Migration's impact on mental health is affected by negative or positive life events, bereavement issues related to loss of relationships/social support networks, assets, stress,



and the geographical distance traveled in the migration process (69). Understanding this impact requires examining, among other things, the different types of mental stresses migrants face (69).

### **5.2.3.a Stress**

The results indicate that migration is related to immediate crises, a desire for a better life, and self-blame. Deprivation, as the source of most crises, and an overwhelming need, expressed in many forms by participants, combine to produce a particular “organization of work, degree of social isolation, and sense of control over life” (139, p17) that results in psychosocial stress. Evolution enabled the body to react to short term stress with a fight-or-flight response. Short term, or acute stress can be exciting, stimulating and rewarding, however evidence shows that long term, or chronic stress, especially prolonged exposure to psychological demands produces increased risks of ill health (139). Biological mechanisms working on the body that react to stress include a cascade of stress hormones, increased heart rate, blood diverted to muscles and an increase in anxiety and alertness (139). The long term effects of sustained levels of such stress response include “depression, increased susceptibility to infection, diabetes, high blood pressure, and accumulation of cholesterol in blood vessels, with the attendant risks of heart attack and stroke” (139, p41). Social isolation, depression, anxiety, and low control at work have been implicated as causal factors. It is interesting to note how conditions such as anxiety and depression are both causal factors and results of chronic stress. These conditions contribute to the vicious circular nature of poverty and social isolation. Chronic stress is an integral part of both social exclusion and powerlessness. The internalization of personal failures and the litany

of negative emotions, as described by Wilkinson (134), results in high levels of psychosocial stress.

#### **5.2.4 Unemployment**

Disease and mortality are intricately linked to unemployment in a bi-directional relationship. A person may become unemployed because she is ill and cannot work, and a person may also become ill due to the effects of being unemployed. Studies have shown that longer-term unemployment causes deterioration in mental health and that mental health deteriorates most rapidly immediately following unemployment (140). A lack of social safety nets for the unemployed in Nicaragua means that unemployment usually results in low living standards and poverty. Long-term unemployment and borrowing are also risk factors for depression and deteriorating physical health (140).

Unemployment and job loss are significantly stressful life events. Working often provides a number of 'latent benefits' including a time structure to the day, self-esteem, the respect of others, using skills and physical and mental abilities, decision freedom, interpersonal contact, social status (depending on the job) and a reason to go on from one day to the next (140). Some jobs, however, can be just as bad as unemployment for mental health (140). Job insecurity seems to have a more severe effect on health, resulting in "increased psychological disturbance" and "increased consumption of medical care" (140, p90). In instances where it is known that job loss is imminent, such as in cases of privatization of public sector services, a general deterioration in health status has been noted in the 'period of anticipation' as well as increases in reported symptoms, long-term illness, and adverse sleep patterns (140). The pendular nature of migration to Costa Rica (a consistent back and forth movement) and widespread job insecurity in Nicaragua both

speak to the risks to psychological health, which are reflected in the data. Some Costa Rican employers allow workers to come home to Nicaragua every now and then: *I was there for four years. About every six months I would get permission to come home and then go back and work again.* (Leticia). Often however, the pendular nature of migration reflects short-term work and job insecurity.

*I went the first time because my sister had been there and she what she earned pretty good money, but she said she didn't want to go back, so I went. I had debts and I was suffocating. But after she spent some time in Nicaragua her business wasn't working out so she called me and said she wanted to go back. Because I was working her job from before, I came home and she left. Then, later, another lady where I had been working in Costa Rica called because she was going to have an operation and she wanted me to come help her. So I went again for the same reasons.* (Ana Cristina)

### **5.2.5 Early Life**

The consequences of the push factors and the results of migration on children are massive (65,81). Health is cumulative over the lifespan, and child health is the foundation for adult health (135). Even before birth, the mother's nutritional status and consumption of alcohol or tobacco will have lifelong effects on her child; similar factors of infection and malnutrition during infancy carry heavy consequences for adult health (135). The factors determining the child's health will also be dependent on the processes of the mother's history: her economic, health and educational status (135).

The social conditions of families are the strongest determinants of early childhood development. Poor family circumstances and function are less likely to produce good health outcomes (124). Risk factors include poverty, maldistribution of income, high rates of parental unemployment and family discord, gender biased and generally restricted opportunities for education, low levels of literacy (women, especially), and low levels of contraception and breast-feeding" (135). In addition, it seems that there are sensitive periods of childhood development, such as ages 6-8 months for core attachment to parents

and 12-13 months for intellectual and linguistic development, and that the accumulation of social risk factors (vulnerability) in childhood is associated with adult illness and health outcomes (135).

Early life experiences can also influence future employment possibilities. Those with childhood experiences of lower socio-economic status, lower levels of education, and a history of material hardship in their family of origin are more likely to be unemployed (140).

Results show that high levels of poverty and the inability to access good health care and education are among the push factors of migration. Clearly, this will have an effect on the youngest generation of Nicaraguans, with many children being born to mothers who have low levels of education and socio-economic status, and resulting poorer health outcomes. In addition, many women leave their children in the care of others, especially at young ages, in order to migrate to Costa Rica, which this discussion shows also has negative health effects. It is interesting here to look at the trends in infant and maternal mortality. Both rates have been steadily dropping over the past 15 years, according to official sources. However, there seems to be a disconnect between official government sources and data gathered by other international agencies. The 2004 Human Development Index, for example, gives an adjusted figure of maternal mortality (per 100,000 live births) in 2000 of 230. The government's reported number for the same year is 98. The UNDP decided to publish both figures because of the discrepancy between national sources and reports from UNICEF, the World Health Organization, and the UN Population Fund. (This is one indication of the problems with data reliability noted in the discussion of Table 1 in the previous Chapter.)

There is a serious social cost of family disintegration as a result of migration that children often bear. Many young Nicaraguan children are being cared for in Nicaragua by

people other than their own parents as a result of migration and a culture where men do not take responsibility for child-raising (81). This increases affective and emotional vulnerability of children and is often seen in emerging psychosocial problems (65). Some participants recognized this danger: *There's no work here, so what do I do? I'm afraid of my children becoming delinquents or thieves. This government is sidelining our youth and pushing them towards becoming gangsters.* (Angela) This situation frequently remakes the family unit whereby others (often grandmothers, aunts, or older sisters) must substitute as parents, although it is poorly understood how and to what extent this relationship works (65,81).

### **5.3 Globalization and Migration**

It is well known that the main causes of international migration are differences in wages, employment opportunities, and human security between countries (67,141). In addition, deteriorating social circumstances and the inability to ameliorate its negative effects (often a result of reduced government expenditures and currency devaluation) contribute to migration patterns (42). Globalization's prescribed package of policy reforms (through structural adjustment programs such as those under ESAF and PRGF loan agreements, and poverty reduction planning such as PRSPs) in the areas of trade policy (liberalization), capital markets, and privatization affect these push factors (32).

Traditional arguments in favour of trade liberalization for poor countries have included the belief that liberalization will reduce poverty and inequality through: 1) A high rate of return to labour (abundant in poor countries) and a low rate of return to capital (scarce in poor countries); and/or 2) providing a base for sustainable growth in incomes and wages (42). Trade liberalization's record, however does not necessarily bear this out, especially in Latin America. In fact, "substantial increases in overall income inequality were

experienced in a range of Latin American countries in the aftermath of trade liberalization;” neither was there substantial poverty reduction from the time policies were implemented in the 1980’s (42). Examples from Africa and Asia reflect similar results that show trade liberalization associated with higher job insecurity combined with excessive work required during times of employment (62). Reddy suggests that trade liberalization *per se* should not be linked to reductions in either inequality or poverty, which require specific forms of market intervention and redistribution on the part of national governments (42).

Discussion of capital markets requires a few definitions. Financial markets are mechanisms which allow people to trade money for securities or commodities (142). Capital account liberalization means the dismantling of barriers to between-country capital flows (143). Traditional economic theory holds that capital flows to poor countries are likely to raise wages and increase employment (42). This capital flow is often in the form of foreign direct investment (FDI). Similar to trade liberalization, however, there is evidence that this belief does not always, or often, hold true. Reddy points out that the vast majority of FDI in developing countries goes only to a small number of recipients, in addition to the lion’s share (which is increasing) being motivated by cross-border mergers and acquisitions, rather than investment in new forms of production (42). As to FDI’s effect on wages, some foreign investment has resulted in higher wages, but the poorest and least skilled workers have little access to this type of employment (42). Overall, it appears that FDI can actually cause an increase in wage inequalities.

Financial market liberalization, especially capital account liberalization is associated with increased inequalities in the distribution of income (42). The ability of financial capital to move ever more freely as a result of fewer and fewer regulations leaves countries vulnerable to speculation and concern about the viability of national economies and

currencies (62). Examples of investor panic in Mexico, Thailand, Argentina and Brazil led to currency devaluations in those countries that undermined the livelihoods of hundreds of millions of people (62).

Negative side effects in the labour market usually accompany trade policy and capital market reforms (42). Shrinking the public sector as a result of privatization and liberalization often results in massive unemployment and a general loss of formal sector employment. The outcome of such loss can produce long-term unemployment or downward mobility since the economy, which is assumed will become dynamic after being liberalized from restrictive regulations, does not appear to absorb workers (42).

This package of policy reforms creates an environment of high poverty and inequality of wealth and consumption, which becomes the push/pull context in which migrants make the decision to look outside the country for better opportunities. Lindio-McGovern has noted that most migration is viewed from an individualist or a social psychology perspective, even though such studies do not often identify themselves as taking a particular perspective. In an individualist view migration is an individual decision; social psychology “attributes migration to individual’s propensity for mobility or ‘migration mentality’” (144, p514). Neither of these perspectives takes the structural factors into account that contribute to the push of diminishing wages, employment opportunities, human security and social conditions.

These structural adjustment/neoliberal policies, applied in Nicaragua beginning in 1990, have brought weak economic growth and an inefficient use of massive amounts of foreign resources: “After more than a decade of reforms, more than 40 percent of Nicaragua’s reduced and unequally distributed income has to be sustained by foreign aid” (145, p37). Reflecting neoliberalism’s underpinning belief in markets and extreme

scepticism of government, these policies were implemented in Nicaragua to dismantle a system of state intervention in the belief that efficiently operating markets would emerge spontaneously (145). The social costs have been high, including drastically reduced spending on health care and education, rising illiteracy, and an increase in poverty (145). Catalan concludes that, “economic reforms in Nicaragua were not designed to minimize the social costs and maximize benefits to the poor” (145, p41). Some participants clearly recognized this effect, saying *there’s an economic crisis in our country* (Estelí), and placing blame on *foreigners, free trade and neoliberalism*. (San Marcos)

### **5.3.1 Remittances**

Remittances are the goods and money earned abroad and sent home by migrants (93,146). They represent a return on the export of labour, a market largely ignored by economic globalization policies (93). Remittances have an informal nature because they are small amounts of money sent to individuals in the home country through a variety of formal and informal channels. The primary use of remittances is consumption, such as for food, clothes, housing, health care, education, and social events such as weddings (67,146,147).

Remittances in Nicaragua, while small in absolute amounts of money sent (an estimated US\$610 million), are significantly important in relative terms (146). In 2000, remittances represented 25 percent of GDP and in 2002 jumped to 29 percent (93). Nicaragua is third in the world for remittances as a percent of GDP, behind only Tonga (37.3 percent) and Lesotho (26.5 percent) (146). It is exceedingly difficult to gauge the actual amount of remittances because of the widespread use of informal sending channels. Even the *Banco Central de Nicaragua* feels that the figures of total remittances are a gross



underestimation since it is possible that anywhere from 10 to 50 percent of total remittances pass through informal channels (146). Remittances are “the mainstay of survival for dense kinship networks,” such as those in Nicaragua (147, p204). This is important considering that women are key players in facilitating and managing remittances, heading up 52 percent of the households that receive them (while only accounting for 23 percent of households overall) (146).

Remittances influence and are influenced by health, migration, and the national economy in the migrant-sending country. In terms of health, remittances increase household income and therefore allow access to better health care, better nutritional status, and access to education (a longer-term payout on health) (67). In terms of migration, remittances allow more economic credibility, meaning possibly more access to credit, and a smoother process for future migration (67). They may also stimulate others to migrate if signs of success are evident (67). The reverse relationship is logical, given that without migration, there would be no remittances. Remittances have a multiplier effect on the national economy (67,147). They generate demand, improve household welfare, can create new markets, and generally have effects on economic growth, trade, and the distribution of wealth in home countries (93). In Nicaragua the distribution of wealth is significant since most migrants who go to Costa Rica are not the extremely poor, meaning that this population does not enjoy the benefit of increased income from outside (146). The overall benefit to the economy may have the long-term effect of reducing migration by reducing the need to go (67). However, the structural factors influencing the migration push are not influenced directly by remittances or the labour power behind them (in fact free labor movement is clearly frowned upon by globalization forces), leaving remittances only a small (and highly unlikely) chance of changing the nature of economic growth and stability. In

addition, as evidenced by migration's effect on health, the social costs involved in generating remittances are high, and it is unknown to what extent this may impact the national economy.

#### **5.4 Summary**

Neoliberal, economic globalization has a particular effect on both migration and health. The majority of 'have-nots' do not benefit from the relationships between these two elements in economic and social terms. Factors such as low wages, un/underemployment, inequality, poverty, lower access to health care (and lower quality care) and education via the requirement of user fees, higher food prices, lower household incomes, and high costs for medical equipment and drugs are the reality for the poor majority in Nicaragua. These conditions contribute to social exclusion and powerlessness, and profound effects on psychological health. In this environment, many people decide that the only way to mitigate these negative circumstances is to look for work somewhere else. This process shows a structural bias as well. It is not the poorest of the poor who go due to logistical, economic, and educational reasons. Migration represents an exportation of the Nicaraguan labour force, which has important implications for national development. These structural conditions cannot be ignored in the analysis of globalization, migration and health. Cuts to social spending are absorbed at the household level, where labour is unpaid and women are primarily responsible for upkeep (19).

The kind of migration undertaken by participants in this study (both documented and undocumented, and all as labourers or domestic employees) produces particular results most apparent in psychological/mental/emotional health issues. I did not measure these effects, although the women spoke both directly and indirectly of them. These effects also

suggest physical health outcomes, and many participants suffered from various health problems such as diabetes, hypertension, ‘nerves,’ tics, sleeping problems, and a dependence on non-prescription medication to make it through the day. Thus, while it was not possible, given the methodology selected for this study, to definitively show a causal relationship between physical health and either psychological health or migration, the link cannot easily be dismissed or ignored. Throughout the interviews, participants themselves attributed most of these problems to the issues arising from their migration experiences (the structural push factors and the process itself).

Migration has both positive and negative outcomes. It is difficult to conclusively determine if one outweighs the other, and which one. The benefits of migration come mostly from remittances, but the cost involved in leveraging those resources is high. Some participants were clear that regardless of the economic benefits, the negative aspects of migration caused deep wounds that would always leave scars.

*I wouldn't recommend that anyone go away. Sometimes it's difficult to pay for what you need, but I believe it's better to, like they say, bite your fingernails, and suffer through it together with your family. Your suffering and sacrifice will never get back the time or love you've lost with your family. (Lorena)*

## **6. Conclusion**

### **6.1 Introduction**

In this section I will provide concluding remarks about the research. Specifically, I will discuss some strengths and limitations of the study, provide some personal reflections on what the process meant for me personally and academically, and conclude with how this study will be used in Nicaragua.

### **6.2 Limitations**

The purpose of this study was to better understand, through first-hand accounts, how women experience the health impacts of employment-seeking migration from Nicaragua to Costa Rica, and how their experiences are linked to globalization; and in so doing, broaden knowledge base of how globalization is interconnected with (and determines) economic and social factors.

The construction of the study allowed for strong, deep inquiry of a qualitative nature into how migration from Nicaragua to Costa Rica is affecting the lives of Nicaraguan women, specifically its impacts on their health and well-being. In addition, document analysis of Nicaragua's loan agreements with the IMF provided a strong summary of conditionalities as a context for the migration phenomenon and suggested relationships with poor health outcomes, especially in relation to migration. This method of exploring the loan conditionalities was a limitation, however, due to its inability to assess the depth of impacts they have against known economic and social determinants of health. The study design only allowed for loose connections, rather than direct strong links to be made among globalization, health and migration. Also, the ability to measure the strength of migration's impact on mental and physical health was not possible within the study design. The lack of

these measures in addition to an uncalculated impact of the export of the Nicaragua labour force made the total cost of migration unknowable.

### **6.3 Further Research Implications**

The limitations of this study suggest a need for further research to fill in the gaps that still exist. Quantitatively analyzing the strength loan conditionalities against social determinants of health would allow for a better evaluation of their overall impacts on health as well as on local contextual phenomena such as migration. It would also allow for comparisons to be made with similar processes that neighbouring countries such as Honduras and Costa Rica have undergone. Because of the connection between poverty and poor health outcomes, there exists the possibility that carrying out such an analysis would contribute to the knowledge in poverty reduction. Quantitatively evaluating the extent of chronic stress and how it manifests itself (both as a result of migration and poverty/social exclusion), combined with a tool to measure the loss of personal, social and economic capital as a result of such stress, as one example, would contribute to our understanding of the impact of inequalities created and sustained by the practical aspects of ideologies such as neoliberalism. An additional area of study that would further illuminate women's experiences would be to repeat the same study with men in order to make comparisons between the two groups.

### **6.4 Personal Reflections**

Designing and carrying out this research has been immensely satisfying both personally and academically. I was able to spend a considerable amount of time (five months in 2005 and two-and-a-half months in 2006) immersed in Nicaragua which

enhanced my language skills and understanding of the cultural, social, and political situation. I was deeply affected on a continuous basis by the injustice of ‘first world’ privileges vs. their poverty. Encountering my data, analyzing it, and preparing it for presentation has not yet ceased bringing tears to my eyes in solidarity with these women who live the unfairness that migration in this context represents.

While I am satisfied that the results of my work in Nicaragua have contributed to improving the ability of the *Red* (to whom I am immensely indebted and gracious for their facilitation of this project) to advocate for migrants and contribute to their (migrants’) education about their situations, it is clear that my benefit is greater in the sense of what obtaining a Master of Science degree will contribute to my future earnings potential and recognition from possible publications resulting from this study. In addition, my study represents another example of how a relatively privileged northern researcher has been able to take advantage of educational opportunities outside my own country to learn and expand my knowledge to my benefit. These opportunities are few and far between for southern students. I do not know a good way that I personally can help to balance out these imbalances, other than to continue on, working from a personal, academic, and professional perspective of social justice and solidarity. As a researcher, I would call for more opportunities for southern students and researchers to have access to global North-South study exchange programs and one-way programs made accessible in the North.

Basing my perceptions on comments from my participants, I believe that this study was beneficial to them. Almost all interviewees thanked me after the interview for providing them an opportunity to share their stories and to make those stories known in Canada (and beyond). Comments from the group activities revealed that women learned about themselves and gained a deeper understanding of what migration means for them

through the process of the activity. While this research process could not affect the structural forces causing migration, it was able to reach women on a more personal level to hopefully provide further insight and a stronger connection with the *Red de Migraciones* which advocates for them.

### **6.5 Use of This Study in Nicaragua**

The *Red de Migraciones* will make primary use of this study in Nicaragua for purposes of advocacy and education. They found the methodology quite useful and during my fieldwork contracted a researcher to repeat the study concurrently with my own work in two separate locations from where I gathered data. Their desire was to provide a larger sample for their own purposes, which I was unable to undertake in total myself due to limitations on my time and ability to handle the amount of data that would have resulted. With the preliminary results I provided, along with other contributions the *Red* solicited from local sources, they have created and published a collection of studies about globalization and migration. I rewrote the final results in lay terms and presented them to participants and other members of the *Red* at the beginning of August 2006. This lay document was crucial to translating the academic language of the study in order for migrants, their families, and especially participants to understand what was contributed to the study and what it means.

In addition, my study will assist the *Red* in their advocacy efforts, especially aimed at the national government, to protect and support migration and migrants.

## Appendix A Consent Form

### Consent Form (English)

#### **AGREEMENT TO PARTICIPATE**

*You are invited to participate in a study called *Women's Experiences with Migration in Nicaragua: Making the Links Between Globalization and Local Health*. Please read this form carefully, and feel free to ask any questions you might have.*

#### **Researcher**

Madeline Johnson, University of Saskatchewan, Canada, Department of Community Health and Epidemiology, College of Medicine. Phone number: 505-251-0280 (Red Nicaragüense de Migraciones in Managua) 621-8307 (cell phone).

#### **Why this project?**

This study is looking at Nicaraguan people who go Costa Rica for work. I want to know how this is connected to changes in the economy (globalization), how it affects women's health in Nicaragua, and how women understand their experiences.

#### **What will happen**

##### **Interviews:**

Only you and I will be present during the interview. I will take notes and record the interviews. I will ask questions about you, your family, your community, your health and how they are related to migration.

##### **Popular Education Session:**

This will be a group activity to discuss a theme about the migration experience. We will discuss this theme and create a representation of how we understand it. Finally, we will analyze the message in the presentation and discuss how it relates to the group. I will tape record this session to help me remember the sequence of events when I write my thesis. You will not personally be identified in the information created from this session.

#### **Possible Benefits and Risks**

I will be audiotaping the interviews and the popular education session. At any time you may turn off the machine, ask that the machine be turned off, refuse to answer any question, or ask to quit the interview completely. You may refuse to participate or quit participating in the popular education session at any time. You may quit the study for any reason, at any time, without penalty of any sort. If you quit the study at any time, any information that you have given will be destroyed.

I hope that the information you provide will help to expand our understanding of the effects that globalization is having on people like yourselves, and that this understanding leads to changes that benefit people like you. I also hope that you will gain new insight into how migration affects your life as well as learn some possible steps you can take to address these effects. But these possible benefits are not guaranteed.

I am aware that migration to Costa Rica sometimes involves illegal actions and these may be included as part of your stories. I will do everything possible to protect you from any negative repercussion of telling me this by maintaining your identity and where you are from a secret.

Because the participants for this study have been selected from a small group of people, all of whom know each other, it is possible that you may be identified to other people because of what you have



said. If it is possible, you will be given the opportunity to review the transcript of your interview, and to add, change, or delete information from the transcripts as you see fit.

**Privacy**

The findings from this study will be made into a book-like final report (a thesis), possibly changed for a journal article, and presented at conferences. Your identity will be kept secret. I will report direct quotations from the interview, but you will be given a fictitious name, and all information that may identify you (names of places, family members or friends) will be removed from my report. I may have someone help me translate a few quotes into English. This person will be made to sign an agreement to keep the information private.

Interview tapes, notes, contact information for follow up studies, and all other data will be stored at the University of Saskatchewan for a minimum period of five years in a locked filing cabinet by Dr. Lewis Williams.

**Questions:**

*If you have any questions about the research, please feel free to ask at any point, in person or you are also free to contact me at the numbers provided above.*

*This study has been approved on ethical grounds by the University of Saskatchewan Behavioural Sciences Research Ethics Board on April 28, 2005. Any questions regarding your rights as a participant may be addressed to that committee through the Office of Research Services (Country code 1, area code 306, number 966-2084). If you wish to call the University, you may call collect. You may find out about the results of this study from the Red Nicaraguense de Migraciones or from Martha Isabel Cranshaw.*

**Agreement to Participate**

I have read and understood this form; I have been provided with an opportunity to ask questions and my questions have been answered satisfactorily. I agree to participate in the study described above and I understand that I may change my mind at any time. A copy of this agreement has been given to me for my records.

\_\_\_\_\_

(Signature of Participant)

\_\_\_\_\_

(Date)

\_\_\_\_\_

(Signature of Researcher)

\_\_\_\_\_

(Date)

## **Consent Form (Spanish)**

### **ACUERDO DE PARTICIPACIÓN**

*Esta es una invitación para participar en el estudio titulado Experiencias de Mujeres con la Emigración en Nicaragua: Haciendo Conexiones entre la Globalización y la Salud Local. Por favor, lea detenidamente este documento y sírvase hacer cualquier pregunta al respecto a la investigadora.*

#### **Investigadora**

Madeline Johnson de la Universidad de Saskatchewan, Canadá, Departamento de Salud Comunitaria y Epidemiología. Número de teléfono: 505-251-0280 (Red Nicaragüense de Migraciones en Managua) o 621-8307 (celular).

#### **¿Por qué se hace este estudio?**

Este estudio hará una investigación sobre los nicaragüenses que van a Costa Rica para trabajar. Quiero saber la forma en que esta situación está conectada con los cambios en la economía (la globalización), cómo afecta la salud de las mujeres nicaragüenses y la manera en que ellas comprenden sus propias experiencias.

#### **Lo que pasará**

##### **Las Entrevistas:**

Durante la entrevista solamente estaremos presentes usted y yo. Tomaré nota y grabaré la entrevista. Le preguntaré a ud. Preguntas sobre usted misma, su familia, su comunidad, su salud, y como todo se relaciona a la emigración

##### **Sesión de Educación Popular:**

Ésta será una actividad en grupo para hablar sobre un tema de la experiencia migratoria. Hablaremos sobre el tema y crearemos una representación que muestra cómo lo entendemos. Finalmente, analizaremos el mensaje de la presentación y hablaremos su significado para el grupo. Grabaré esta sesión para ayudarme a recordar la secuencia de los eventos al momento de escribir mi tesis. Ud. no será identificada personalmente en la información producida a través de esta sesión.

#### **Los Beneficios y Riesgos Posibles**

Grabaré las entrevistas y la sesión de educación popular. En cualquier momento ud. tiene el derecho de apagar la máquina, de pedir que yo apague la máquina, de negarse a responder cualquier pregunta o de abandonar la entrevista completamente. En cualquier momento, ud. tiene el derecho de negarse a participar o dejar de participar en la sesión de educación popular. En cualquier momento, ud. tiene el derecho de dejar de participar en el estudio por cualquier razón, sin penalidad ni riesgo de cualquier índole. Si deja de participar en el estudio en cualquier momento, cualquier información que haya provisto será destruida.

Espero que la información que ud. proporcione ayude a ampliar el entendimiento de los efectos de la globalización en la gente como usted. Espero que este entendimiento conduzca a cambios que beneficien a gente como usted. También espero que ud. obtenga un nuevo entendimiento sobre la manera en que la emigración afecta su vida y que aprenda algunas medidas que puede tomar para abordar estos efectos. Sin embargo, no se garantizan estos beneficios.

Soy consciente de emigrar a Costa Rica para trabajar aunque a veces consista en acciones ilegales, os cuales tal vez incluya su historia. Intentaré en todo lo posible protegerle de cualquier consecuencia negativa en contarme eso en manteniendo en secreto su identidad y de dónde es.

Debido al hecho de que las participantes de este estudio han sido seleccionadas de un grupo pequeño y que posiblemente todas se conozcan, es posible que otra gente la pueda identificar a usted por lo que haya dicho. Si es posible, se le dará la oportunidad de revisar la transcripción de su entrevista, y la posibilidad de añadir, cambiar o borrar información de la transcripción según le parezca.

### **La Privacidad**

Las conclusiones de este estudio se harán en un reporte final como un libro (una tesis), se cambiarán posiblemente para un artículo para una revista y se presentarán en congresos. Su identidad se mantendrá en secreto. Presentaré algunas citas directas de la entrevista, pero a ud. se le dará un nombre ficticio y toda la información que pueda identificarla a ud. (nombres de lugares, de miembros de su familia o amigos) será eliminada de mi reporte. Es posible que alguien me ayude con la traducción al inglés de algunas citas. Esta persona firmará un acuerdo para mantener la información en secreto.

Las grabaciones, los apuntes, la información para contactarla para posibles estudios futuros y todos los datos además están guardados bajo llave por Dra. Lewis Williams en la Universidad de Saskatchewan en un armario de archivos, por un tiempo mínimo de 5 años.

### **Preguntas:**

*Si tiene cualquier pregunta sobre la investigación, sírvase preguntarme con confianza en cualquier momento, en persona o a los números arriba.*

*Este estudio ha sido aprobado con base ética por la Junta Ética de Investigación en Ciencias del Comportamiento de la Universidad de Saskatchewan en la fecha 28 de Abril, 2005. Cualquier pregunta sobre sus derechos como participante puede ser dirigida a este comité a través de la Oficina de Servicios de Investigación (1-306-966-2084). Se puede llamar a la Universidad a cobro revertido. Ud. puede obtener los resultados de este estudio a través de la Red Nicaragüense de Migraciones o Marta Isabel Cranshaw.*

### **Acuerdo de participación**

He leído y entendido este documento. Se me ha dado la oportunidad de hacer preguntas, las cuales han sido respondidas satisfactoriamente. Estoy de acuerdo en participar en el estudio descrito arriba y entiendo que puedo cambiar de opinión en cualquier momento. Se me ha dado una copia de este acuerdo para mi información.

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Firma de la participante

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Fecha

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Firma de la investigadora

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Fecha

## **Appendix B Table 1 Sources**

### **Population**

1991-1994, 1996-2000:

Instituto Nicaragüense de Estadísticas y Censos. Población estimada al 30 de Julio, por sexo. Años 1990-2002. Managua: Instituto Nicaragüense de Estadísticas y Censos; 2002.

1995:

Instituto Nicaragüense de Estadísticas y Censos. Población total por sexo y area de residencia, según departamento, grupos de edad y edades simples. Managua: Instituto Nicaragüense de Estadísticas y Censos; 1995.

2001:

Instituto Nicaragüense de Estadísticas y Censos. Población total por area de residencia y sexo, según departamento y grupos de edades quinquenales. Managua: Instituto Nicaragüense de Estadísticas y Censos; 2001.

2002:

Instituto Nicaragüense de Estadísticas y Censos. Población total por area de residencia y sexo, según departamento y grupos de edades quinquenales; 2002.

2003:

Instituto Nicaragüense de Estadísticas y Censos. Población total por area de residencia y sexo según departamento y grupos de edades quinquenales. Managua: Instituto Nicaragüense de Estadísticas y Censos; 2003.

### **Population growth (5%)**

All years:

Calculations based on population

### **GDP (millions of US\$, 2000-4 in constant 1990 prices)**

1991-1999:

Banco Central de Nicaragua. Producto Interno Bruto. Managua: Banco Central de Nicaragua; 1999.

2000-2004:

United Nations Statistics Division. Nicaragua - all series. GDP at current and constant 1990 prices, per capita GDP, growth rate. Geneva: United Nations; 2005.

### **GDP per capita**

1992-1999:

Gobierno de Nicaragua, Instituto Nacional de Estadísticas y Censos. Analisis de la pobreza y la seguridad alimentaria nutricional en Nicaragua. Managua: Programa MECOVI, Banco Mundial, ASDI, NORAD, PNUD; 2004.

2000-2004:

United Nations Statistics Division. Nicaragua - all series. GDP at current and constant 1990 prices, per capita GDP, growth rate. Geneva: United Nations; 2005.

### **Inflation rate (%)**

1991-1995:

World Bank. Republic of Nicaragua Poverty Assessment Report No 14038-NI. 1995

1992-2002:

Gobierno de Nicaragua, Instituto Nacional de Estadísticas y Censos. Analisis de la pobreza y la seguridad alimentaria nutricional en Nicaragua. Managua: Programa MECOVI, Banco Mundial, ASDI, NORAD, PNUD; 2004.

2003:

Banco Central de Nicaragua. Capitulo II desempeño de la economía Nicaragüense. In: Banco Central de Nicaragua, editor. Informe Anual 2003 Managua: Banco Central de Nicaragua; 2003. p. 13-66.

### **External debt (millions of US\$)**

1991-1994:

USAID. Nicaragua: selected economic data. Austin: University of Texas LANIC; 1996.  
[http://lanic.utexas.edu/la/region/aid/aid96/Country\\_Economic/niccen.html](http://lanic.utexas.edu/la/region/aid/aid96/Country_Economic/niccen.html)

1995-2003:

Central Bank of Nicaragua. Summary of macroeconomic statistical tables 1994 - 2004. Managua: Central Bank of Nicaragua; 2004.

### **External debt (% GDP)**

1991-1994:

United Nations Economic Commission for Latin America and the Caribbean. Nicaragua. Economic Survey of Latin America and the Caribbean Washington, DC: United Nations Economic Commission for Latin America and the Caribbean; 1999. p. 245-252.

1995-2003

Central Bank of Nicaragua. Summary of macroeconomic statistical tables 1994 - 2004. Managua: Central Bank of Nicaragua; 2004.

### **Debt per capita (US\$)**

All years: calculated as total external debt/population

### **External debt service (millions of US\$)**

1995-2003:

Central Bank of Nicaragua. Summary of macroeconomic statistical tables 1994 - 2004. Managua: Central Bank of Nicaragua; 2004.

### **Unemployment rate**

1991-1999:

Coordinadora Regional de Investigaciones Economicas y Sociales. Highlights of current labor market conditions in Nicaragua. Managua: Coordinadora Regional de Investigaciones Economicas y Sociales; 2001.

2000-2003:

Central Bank of Nicaragua. Summary of macroeconomic statistical tables 1994 - 2004. Managua: Central Bank of Nicaragua; 2004

**Underemployment rate:**

1991-1999:

Coordinadora Regional de Investigaciones Economicas y Sociales. Highlights of current labor market conditions in Nicaragua. Managua: Coordinadora Regional de Investigaciones Economicas y Sociales; 2001.

2000, 2003:

Gobierno de Nicaragua, Instituto Nicaragüense de Estadísticas y Censos. Informe general sobre encuesta de hogares para medición del empleo. Managua: Gobierno de Nicaragua; 2004.

**Consumption**

1994:

Vargas O. Entre el laberinto y la esperanza. Managua: Ediciones Nicarao; 1995.

1997:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook for Latin America and the Caribbean 2001. Santiago, Chile: ECLAC; 2001.

1998:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2002. p. 149-272.

2000:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2003. p. 237-339.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2004. p. 139-250.

**Gini Index**

1993, 1997, 2002:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook for Latin America and the Caribbean 2001. Santiago, Chile: ECLAC; 2001.

1998:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2002. p. 149-272.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report. New York: Oxford University Press; 2004. p. 139-250.

**Poverty rate (national poverty line % of population) and Poverty in absolute numbers**

1993, 1998, 2001:

Gobierno de Nicaragua, Instituto Nicaragüense de Estadísticas y Censos. Perfil comparativo de la pobreza en Nicaragua 1993 - 1998 - 2001. Managua: BM, BID, ASDI, NORAD, DANIDA, PNUD, BCN, BCN, FISE; 2003.

**Literacy Rate (%)**

1991:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook for Latin America and the Caribbean 2001. Santiago, Chile: ECLAC; 2001.

1993-1998:

Gobierno de Nicaragua, Instituto Nicaragüense de Estadísticas y Censos. Perfil comparativo de la pobreza en Nicaragua 1993 - 1998 - 2001. Managua: BM, BID, ASDI, NORAD, DANIDA, PNUD, BCN, BCN, FISE; 2003.

1999:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human Development Report. New York: Oxford University Press; 1994. p. 117-240.

2000:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human Development Report. New York: Oxford University Press; 1994. p. 117-240.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report. New York: Oxford University Press; 2003. p. 237-339.

2002:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report. New York: Oxford University Press; 2004. p. 139-250.

2003:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report. New York: Oxford University Press; 2005. p. 219-328.

**Combined primary, secondary & tertiary enrollment (%)**

1991:

UNDP, editor. Human Development Report. New York: Oxford University Press; 1994. p. 117-240.

1993:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report. New York: Oxford University Press; 1996. p. 123-230.

1994:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 1997. p. 135-263.

1995:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 1998. p. 119-241.

1997:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 1999. p. 134-262.

1998:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2000. p. 141-286.

1999:

United Nations Development Programme. Human development Indicators. In: UNDP, editor. Human Development Report. New York: Oxford University Press; 2001. p. 141-264.

2000:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2002. p. 149-272.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2003. p. 237-339.

2002:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2004. p. 139-250.

2003:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2005. p. 219-328.

### **Education spending (% GDP)**

1991-1995:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook 1997. Santiago, Chile: ECLAC; 1997.

1996-2000:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook 2001. Santiago, Chile: ECLAC; 2001.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2003. p. 237-339.



2002:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2004. p. 139-250

**Life expectancy at birth (years)**

1991-1999:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook 2001. Santiago, Chile: ECLAC; 2001.

2000:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2002. p. 149-272.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2003. p. 237-339.

2002:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2004. p. 139-250

2003:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2005. p. 219-328.

**Infant mortality rate (per 1,000 live births)**

1990-2001:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook 2001. Santiago, Chile: ECLAC; 2001.

**Maternal mortality rate (per 100,000 live births)**

1991-2003:

Ministerio de Salud Republica de Nicaragua. Situación nacional de mortalidad materna. Managua: Ministerio de Salud Republica de Nicaragua; 2003.

**Health spending (% GDP)**

1991-1995:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook 2001. Santiago, Chile: ECLAC; 2001.

1996-2000:

United Nations Economic Commission for Latin America and the Caribbean. Statistical Yearbook 2001. Santiago, Chile: ECLAC; 2001.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2003. p. 237-339.

2002:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2004. p. 139-250

Per capita (PPP)

1998:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2000. p. 141-286.

2001:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2003. p. 237-339

2002:

United Nations Development Programme. Human development indicators. In: UNDP, editor. Human development report New York: Oxford University Press; 2004. p. 139-250

**Remittances (millions of US\$)**

1994-2000, 2003:

Baumeister E. Migración internacional y desarrollo en Nicaragua. Santiago, Chile: Comisión Económica para América Latina, FNUAP; 2006.

**Remittances as % of GDP**

2000:

Orozco M. Oportunidades y estrategias para el desarrollo y el crecimiento a través de las remesas familiares. Washington, DC: Diálogo Inter-Americano; 2003.

2002:

Orozco M. Remittances to Latin America and Caribbean: issues and perspectives on development. Washington, DC: Organization of American States; 2004.

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