

The Stratified Emergentist Polanyian Perspective: A Relational Approach for the Study of the Economy of the Family

Sonia Carolina López Cerón

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A Relational Approach for the Study of the Economy
of the Family**

**Het gelaagde Polanyiaanse emergentie-perspectief:
een relationele benadering van onderzoek naar de
economie van het gezin**

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The logo of Erasmus University, featuring the word 'Erasmus' in a stylized, cursive script.

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The little girl asked: What is freedom?

Jairo Anibal Niño replied: "*Freedom is a tiger with wings*".

Thirty years later, she murmurs: No tiger, no wings... I am simply and naturally free.

Writing this dissertation has been part of my journey of understanding freedom. Freedom is a great concern for me and I am committed to unpacking it, as a concept and as a way of living. Studying the economy of the family was a way of explaining freedom and some of its conditioning. The journey has been fascinating and was only possible because of the presence of wonderful people.

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Abstract

This dissertation attempts to fill a gap in the theoretical field of the economics of the family through the proposal of a middle-range theory: the stratified emergentist Polanyian perspective. From this perspective, the economy of the family is an emergent, complex social phenomenon which both constitutes and is a result of the interplay of causal mechanisms from the structural, cultural and agential elements of the social system. The central question that this dissertation addresses is therefore a theoretical one: How should the economy of the family be studied? I argue that the existing literature in the field cannot explain the emergence of economic relations of the family because of an ontological limitation. The economy of the family has been researched from different approaches. Mainstream modern economics, based on an understanding of the family as an aggregation of rational individuals acting under the logic of utility maximisation, has been the dominant approach. Heterodox approaches have made contributions to the field, but they do not overcome the gap in their treatment of the human being and the structure-agency relation. This ontological limitation comes from not addressing relationality.

Proposing a middle-range theory based on Critical Realist metatheory provides a solution to this limitation and contributes to a wider shift in the field of the economics of the family. As part of my proposal, Karl Polanyi's 'human economy as an instituted process' provides an alternative conceptualisation of the economy where emergence is central to understanding and conceptualising social relations. Critical Realist metatheory allows Polanyi's relational perspective to be embedded in a stratified ontology. The proposal built in this dissertation also works from the complementarities of Critical Realism and three components from the Morphogenetic-Morphostasis (M/M) approach: (1) explaining social phenomena by unpacking their agential, structural and cultural elements; (2) analytical dualism for the treatment of these elements; and (3) the stratified model of people. These components are central to this proposal. They enable a non-conflationary treatment of the interplay between structural, cultural and agential elements in the social elaboration of the economy of the family. The stratified model of people connects their concerns and the emergence of emotions and explains the relation between personal and social identity. These relations contribute to an explanation of how and why the economy of families emerges and evolves in a particular place. Using abduction as a mode of inference, I work with 80 illustrative cases of families from Bogotá, Colombia.

The stratified emergentist Polanyian perspective uses Polanyi's forms of integration to the economy: market exchange, reciprocity and redistribution. Through the process of discernment, deliberation and dedication, human beings decide the concerns to which they will dedicate their time and energy. 'Reciprocity', for example, can be their most favoured form of integration at one moment (or consistently), because they find pleasure in giving or receiving without future expectations of repayment, but with a commitment to give to another person in a similar situation or condition in the future. This can also happen with exchange and redistribution. The stratified emergentist understanding of the economy of the family and conceptualization of the 'human economy as an instituted process' are central to explaining

how and why this is the case. In this dissertation, I argue that the family's economy emerges because of an interplay of causal mechanisms and their activation / mediation by human agency. This includes the process of emergence of personal identity in interplay with social identity, with the two being connected by relational reflexivity. In the concepts of personal identity and social identity, emotions and emotionality have a space and, importantly, are not reduced to preferences.

My overarching argument is that an innovative theoretical and methodological framework is required for the study of the economy of the family because the existing literature cannot explain the complexity of this social phenomenon. The stratified emergentist Polanyian perspective helps to explain how and why a market-led configuration of the economy has emerged and evolved in Bogotá, Colombia, and how reciprocity is subordinated to the binomial market/state in a complementary supportive relation. The dissertation's proposal illuminates the cases of 80 Bogotá families within their contrasting realities. An in-depth analysis of the interplay of mechanisms operating from structure, culture and agency is made using three cases of lower income families in particular. This analysis explains their integration to the economy through market exchange, redistribution and reciprocity. It also highlights that when the market/state binomial (Donati's term) is unable to meet the needs of the family, reciprocity from the extended family and friends are necessary and critical to cover this gap. At the same time, these acts of reciprocity generate relational goods -- bonds of mutuality and solidarity -- with their own emergent powers. It is by answering the theoretical question that this dissertation addresses that the stratified emergentist Polanyian perspective explains the importance of reciprocity for these families in Bogotá, Colombia, and also its importance for the stability of the market-led configuration of the economy.

Het gelaagde Polanyiaanse emergentie-perspectief: een relationele benadering van onderzoek naar de economie van het gezin

Sonia Carolina López Cerón

Samenvatting

Het doel van dit proefschrift is om een leemte op te vullen in de theorievorming op het gebied van de economie van het gezin. Daarom wordt hier een *middle-range*-theorie voorgesteld: het gelaagde Polanyiaanse emergentie-perspectief. Hierin wordt de economie van het gezin beschouwd als een zich ontwikkelend, complex sociaal fenomeen dat zowel het samenspel van causale mechanismen uit de structurele, culturele en handelende elementen van het sociale systeem belichaamt, als daar het gevolg van is. De centrale onderzoeksvraag in dit proefschrift is dus een theoretische vraag: Hoe moet de economie van het gezin worden onderzocht? In dit proefschrift wordt betoogd dat de bestaande onderzoeksliteratuur het ontstaan van economische relaties van het gezin niet kan verklaren. Dit heeft te maken met een ontologische beperking. De economie van het gezin is onderzocht vanuit verschillende invalshoeken. De gangbare benadering in de moderne economie, waarin het gezin wordt beschouwd als een verzameling rationele individuen die handelen volgens de logica van nutsmaximalisatie, is tot nu toe dominant. Heterodoxe benaderingen hebben een bijdrage geleverd aan het onderzoeksgebied, maar voorzien niet in de leemte vanwege de manier waarop de mens en de structuur-agency-relatie daarin wordt benaderd. Deze ontologische beperking komt voort uit het feit dat er geen aandacht is voor relationaliteit.

Een middle range-theorie gebaseerd op een kritisch realistische metatheorie biedt een oplossing voor deze beperking en draagt bij aan een bredere verschuiving op het gebied van de economie van het gezin. De 'menselijke economie als een geïnstitutionaliseerd proces' van Karl Polanyi vormt een onderdeel van de in dit proefschrift voorgestelde theorie. Dit idee van Polanyi biedt een alternatieve benadering van de economie met emergentie als centraal concept om sociale relaties te begrijpen en te conceptualiseren. Met een kritisch realistische metatheorie wordt Polanyi's relationele perspectief ingebed in een gelaagde ontologie. De in dit proefschrift voorgestelde theorie gaat ook uit van de complementariteit van kritisch realisme en drie componenten uit de morfogenetische-morfostase (M/M) benadering: (1) het verklaren van sociale fenomenen door hun handelings-, structurele en culturele elementen bloot te leggen; (2) analytisch dualisme bij de behandeling van deze elementen; en (3) het gelaagde model van mensen. Deze componenten staan centraal in de hier voorgestelde theorie. Dit maakt een niet-samenvoegende behandeling mogelijk van het samenspel tussen structurele, culturele en handelingselementen in de sociale uitwerking van de economie van het gezin. Het gelaagde model van mensen verbindt wat hen bezighoudt en het ontstaan van emoties en verklaart de relatie tussen de persoonlijke en sociale identiteit. Deze relaties kunnen mede verklaren hoe en waarom de economie van gezinnen op een bepaalde plaats ontstaat en evolueert. In dit onderzoek is gebruikgemaakt van abductie bij de analyse van tachtig illustratieve casussen van gezinnen uit de Colombiaanse hoofdstad Bogota.

In het gelaagde Polanyiaanse emergentie-perspectief wordt gebruikgemaakt van de door Polanyi voorgestelde vormen van integratie in de economie: marktruil, wederkerigheid en herverdeling. In een proces van onderscheiding, overleg en inzet bepalen mensen waaraan ze hun tijd en energie besteden. Zo kan 'wederkerigheid' bijvoorbeeld op een bepaald moment (of consequent) hun favoriete vorm van integratie zijn, omdat ze er genoeg in scheppen om te geven of te ontvangen zonder iets terug te verwachten, maar met de wil om in de toekomst ook te geven aan iemand anders in een vergelijkbare situatie of toestand. Dit kan ook het geval zijn bij ruil en herverdeling. Het gelaagde emergentie-perspectief als model in de economie van het gezin en het concept van de 'menselijke economie als een geïnstitutionaliseerd proces' verklaren hoe en waarom dit zo is. In dit proefschrift wordt betoogd dat de economie van het gezin ontstaat door een samenspel van causale mechanismen en de activering/mediëring daarvan door menselijk handelen. Dit omvat het ontstaan van de persoonlijke identiteit in wisselwerking met de sociale identiteit, waarbij deze twee onderling verbonden zijn door relationele reflexiviteit. Binnen de concepten persoonlijke identiteit en sociale identiteit bestaat ruimte voor emoties en emotionaliteit en die worden daarin niet gereduceerd tot voorkeuren.

In het algemeen wordt in dit proefschrift betoogd dat een innovatief theoretisch en methodologisch kader nodig is om de economie van het gezin te onderzoeken, omdat de bestaande literatuur de complexiteit van dit sociale fenomeen niet kan verklaren. Met behulp van het gelaagde Polanyiaanse emergentie-perspectief kan het hoe en waarom van het ontstaan en de ontwikkeling van een marktgestuurde economie in de Colombiaanse hoofdstad Bogota worden verklaard. Dit perspectief biedt ook een verklaring voor de ondergeschiktheid van wederkerigheid aan de binomiaal markt/staat in een complementaire ondersteunende relatie. De in dit proefschrift voorgestelde theorie belicht tachtig casussen van gezinnen in Bogota binnen hun contrasterende omstandigheden. Aan de hand van drie casussen van gezinnen met een laag inkomen wordt het samenspel van mechanismen die te maken hebben met structuur, cultuur en agency diepgaand geanalyseerd. De integratie van deze gezinnen in de economie door middel van marktruil, herverdeling en wederkerigheid wordt met deze analyse verklaard. Hiermee wordt ook benadrukt dat wederkerigheid van de extended family en vrienden nodig en van cruciaal belang is wanneer de binomiaal markt/staat (een term van Donati) niet in de behoeften van het gezin kan voorzien. Deze vormen van wederkerigheid genereren tegelijkertijd relationele opbrengsten: banden gebaseerd op reciprociteit en solidariteit, die hun eigen ontlukende krachten hebben. Met het beantwoorden van de theoretische vraag die in dit proefschrift wordt gesteld verklaart het gelaagde Polanyiaanse emergentie-perspectief het belang van wederkerigheid voor deze gezinnen in de Colombiaanse hoofdstad Bogota, en ook het belang ervan voor de stabiliteit van de marktgestuurde economie.

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LIST OF ACRONYMS

ANDI	National association of industrial companies
AUC	Autodefensas unidas de Colombia
BCH	Central Mortgage Bank
CAV	Corporaciones de Ahorro y Vivienda
CEPs	Cultural emergent properties
CFF	Financial Family Advisory Center
CINEP	Centre for Investigation and Popular Economy
CPC	Constitución Política de Colombia
CR	Critical Realism
COLCIENCIAS	National Government Department of Science, Technology, and Innovation
DANE	National Administrative Department of Statistics
DNP	National Planning Department of Colombia
EIG	Encuesta nacional de ingresos y gastos
ELCA	Encuesta Longitudinal Colombiana de la Universidad de los Andes - Longitudinal Colombian Survey of the University of the Andes
ELN	Ejército de liberación nacional
FARC	Fuerzas armadas revolucionarias de Colombia
FCF	Family Compensation Fund
ICBF	Colombian Family Welfare Institute

ICETEX	Colombian Institute for Education Loans and Technical Studies Abroad
ICFES	Colombian Institute for Educational Evaluation
ICT	Institute for Territorial Loans
IDB	Inter-American Development Bank
INURBE	National Institute of Social Housing and Urban Reform
JEP	Special Jurisdiction for Peace
M/M	Morphogenetic-Morphostasis approach
NHE	New home economics
NGO	Non-governmental organizations
NMW	National minimum wage
OECD	Organisation for Economic Co-operation and Development
PEPs	People emergent properties
SENA	National Learning Service
SISBEN	Selection Beneficiary System
SITP	Public Integrated Transit System
UNDP	United Nations Development Program
UP	Patriotic Union
VAT/IVA	Value-added-tax

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Law- LEY 590 de 2000 [Reglamentada por el Decreto Nacional 2473 de 2010](#) "Por la cual se dictan disposiciones para promover el desarrollo de las micro, pequeñas y medianas empresa".

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CURRENT POSITION

- Pontificia Universidad Javeriana** Bogotá, Colombia
Assistant Professor, Faculty of Economics and Administrative Sciences
- Head and Co-founder of the Family Finance Advisory Center (founded in 2011)
 - Coordinator and teacher of Managerial Finance undergraduate course (2019).

EDUCATION

Erasmus University Rotterdam The Hague, The Netherlands
International Institute of Social Studies
PhD. in Social Sciences, January 2020: Thesis titled ‘The stratified emergentist Polanyian perspective: A relational approach for the study of the economy of the family’.

Pontificia Universidad Javeriana Bogotá, Colombia
Faculty of Economics and Administrative Sciences
Master of Economics, November 2005: Thesis titled: ‘The microcredit market for rural activities: Empirical verification in the south of Santander, Colombia’.

Pontificia Universidad Javeriana Bogotá, Colombia
Bachelor in Business Administration, May 2004. Honor Mention for academic excellence.

PUBLICATIONS

03/2017 **Rural savings and loan cooperatives: Five cases in the south of Santander.** In: [Cooperatives, Grassroots Development, and Social Change: Experiences from Rural Latin America](#). Ed. by Marcela Vásquez-Léon, Brian J. Burke, et al. University of Arizona Press; 3rd edition. Pp. 187-202.

10/2008 **Integración económica en el mundo globalizado de las comunidades indígenas a través del modelo cooperativo (Economic integration in the globalized of the indigenous communities through the cooperative model).** Paper in the magazine UNIRCOOP Vol. 6 No. 1. Index to the Consorcio de Revistas Científicas en Cooperativismo y Economía Social. Edited IRECUS Faculté d'administration Université de Sherbrooke. October 2008.

2007 **Los servicios de microfinanzas en las cooperativas de ahorro y crédito rurales y su aporte a la superación de la pobreza (The microfinance services in the saving and credit rural cooperative organization and their contribution to poverty reduction).** Chapter 7 of the book: La intercooperación del concepto a la práctica. Edited IRECUS Faculté d'administration Université de Sherbrooke, Canada. 2007.

CONFERENCE PRESENTATIONS

11/2018 **Bogotá lower and middle-income families' economic relations, answering to the challenge of structural inequality.** In: 16th Development Dialogue PhD Development Studies international conference. The Hague, The Netherlands.

11/2018 **The economy of the family, giving a chance to human beings.** In 7th conference on International Development, Institute of Development Research and Development Policy (IEE) Ruhr-University Bochum, Germany.

09/2014 **Las Microfinanzas en los Fondos de Empleados: Oportunidades e innovación.** Asociación Nacional de Fondos de Empleados de Colombia ANALFE. Cali, Colombia.

07/2005 **El Microcrédito Productivo Rural.** II Simposio Nacional de Docentes de Finanzas. Universidad Javeriana, Politécnico Gran Colombiano y Universidad Externado de Colombia. Bogotá, Colombia.

10/2004 **Metodología para la valoración financiera de una empresa cooperativa de Ahorro y Crédito Rural: caso CoopValle Ltda.** VIII Seminario Internacional de la Red Unircoop, "La identidad de la cooperativa, el corazón de su éxito: presentación de herramientas de gestión" Sherbrooke University, Canada.

11/2004 **Metodología para la valoración financiera de una empresa cooperativa de Ahorro y Crédito Rural: caso CoopValle Ltda.** I seminario de investigación en Economía Solidaria: Universidad Javeriana Bogotá, Colombia.

PROFESSIONAL AND RESEARCH EXPERIENCE

07/12/ – 01/20 **Erasmus University Rotterdam** The Hague, The Netherlands
PhD researcher, International Institute of Social Studies

- GLSJ: Government, Law and Social Justice
- Member Research Committee (2016-2017)

09/2007 – 06/2010 **Junior Consultant** of corporate finance, independent team. Bogotá, Colombia

- Developed and analyzed financial analysis, cash flow analysis, financial valuation. Cooperativa de ahorro y crédito del Valle de San José, GRICOL, Gimnasio Fuentes del Río School, GALÉMICOS SALUD IPS.

01/2003 - 05/2007 **Pontificia Universidad Javeriana** Bogotá, Colombia
Researcher and Research Assistant for the Rural Studies Institute, Faculty of Rural and Environmental Studies

- I formulated and prepared research proposals.
- I was co-researcher for these projects:

- **Economic integration into the global world of the indigenous communities through the cooperative model.** Financed by UNIRCOOP. Multi countries investigation.
- **Transformation through the modernization logics in four organizations of black sugar (Trapiches) producers in the town of Valle de San José (Santander, Colombia).**
- **Regional study of savings and credit cooperatives, comparative analysis of financial variables.**
- I developed and carried out interviews for these projects:
 - **Success and Innovation in Cooperative Management: Cases of study cooperative organizations of savings and credit of Guadalupe and Valle de San José – Santander, Colombia.**
 - **Research - Action for the development of the democratic management in a cooperative organization. Participation and democratic management in cooperative organizations.** Financed by UNIRCOOP. Multi countries investigation.
 - I collected and analyzed statistics of the financial accounts of the cooperatives in the studies and national accounts.
 - I designed and carried out an opinion survey for the cooperative organizations of savings and credit of Guadalupe and Valle de San José, Santander, Colombia.
- I coordinated and organized the rural program for students from different faculties of the university and integrated them into the projects of the institute.

05/2006 - 08/2006 **Ford Foundation**

Bogotá, Colombia

Junior consultant: Local self-management organizations of savings and credit: The strengthening of the microfinance market in Colombia. Financed by the Ford Foundation.

- I developed and carried out interviews
- I collected and analyzed statistics of the finance accounts of the local self-management organizations of savings and credit.

COMPUTER SKILLS: Nvivo, AtlasTi, Microsoft Office, Eviews, SPSS, Crystal Ball, Bloomberg, Economatica.

LANGUAGES: Spanish (mother tongue), English (highly proficient), French and Italian (initial level)