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**THESIS SUBMITTED TO OBTAIN THE BACHELOR IN ENGLISH WITH FOCUS IN
TRANSLATION**

**Translation And Analysis Of The Documents “The Race In The Workplace: The
Frontline Experience” from English to Spanish And “La feminización del cuidado no
remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas
mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y
La Paz de Piedades Norte de San Ramon de Alajuela” From Spanish To English**

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CHAPTER I

Introductory Framework

Since ancient times, the need for communication has been an intrinsic part of human life, and social evolution; which throughout the years, has led to interactions with other languages through different methods such as interpretation, translation, dubbing, and transcription, among others. For this research, the focus will be specifically on translation as a path for achieving proper and accurate communication. In this chapter, specific aspects of translation will be presented and briefly explained to provide an understanding of its importance within the broader context n this investigation. This exploration aims to highlight how translation facilitates not only the conveyance of meaning but also the preservation of cultural intentions across linguistic barriers.

Moreover, the objectives presented in this study will enable the investigator to prove and validate the various processes and methodologies related to translation. By doing so, the idea is to supply readers with the necessary knowledge and background to notice and appreciate the complex work involved in achieving naturalness and coherence within the translated documents. The insights gained from this investigation will serve as a foundation for the following chapters, ensuring that readers are well-prepared to grasp the complexities around translation. In this paper, the two documents that were analyzed present the hardships and socioeconomic vulnerability of two minorities in two different countries, specifically the United States and Costa Rica. By putting both together, the translator pursues to provide an accurate and advocated document version, using a focused analysis and terminology from a Human Rights-related perspective. Besides, the tone of the documents translated is intended to reach a broader audience, which can be achieved through translation. Through this analysis, the investigator aims to demonstrate how translation not only connects different

languages, but also amplifies the voices of multiple communities, contributing to a more inclusive and informed society,

1.1 Problem Statement

This thesis investigates the translation of two documents addressing the experiences of vulnerable populations in Costa Rica and the United States: “The Race in the Workplace: The Frontline Experience”, from English to Spanish; and “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Angeles Norte y La Paz de Piedades Norte de San Ramon de Alajuela” from Spanish to English. These documents report issues on wage disparities, lack or limitation of benefits, and other workplace challenges faced by women and racial minorities in their professional roles.

As these issues resonate across linguistic and cultural boundaries, it is crucial to present this information accessibly and effectively for broader audiences, including non-native language speakers in both regions. Thus, the research focuses on applying specialized translation techniques that address Human Rights considerations, to ensure that the translated texts are accurate, culturally sensitive, and facilitate a clear understanding of social inequities. By carefully selecting translation strategies, terminology, and linguistic adaptation methods, this project aims to present the texts in a way that preserves their integrity and supports advocacy for Human Rights within vulnerable communities.

1.2 Investigation Objectives

1.2.1 General Objective

To translate the documents “The race in the workplace: The frontline experience” from English to Spanish, and “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Angeles Norte y La Paz de Piedades Norte de San Ramon de Alajuela” from Spanish to English, utilizing specialized Human Rights translation techniques that enhance accessibility, cultural sensitivity, and engagement with target audiences.

1.2.2 Specific Objectives

- To analyze the original documents for linguistic and cultural elements that may challenge direct translation, identifying areas where Human Rights-specific adaptation is required to maintain the desired advocacy impact.
- To conduct a deep analysis of the challenges and impacts of Human Rights terminology in translating texts about vulnerable populations, assessing how these terms affect comprehension and naturalness.
- To create a bilingual glossary of critical Human Rights and socio-economic terminology encountered in the translations, ensuring consistent and accurate application in both languages, Spanish and English.
- To evaluate the translated texts’ effectiveness in conveying the original message with cultural relevance and readability, contributing to develop proper awareness and promoting equitable access to information.

1.3 Justification of the study

The motivation of this research is to translate two documents that brought attention and visibility to the salary gap and lack of benefits exposed by race minorities in the United States, and women from vulnerable zones in Costa Rica. Studying these experiences through translation will provide more information to non-native speakers in both countries.

Additionally, it will serve as references or antecedents for future investigators as the paper has a wide range of Human Rights-specific terminologies. Furthermore, the translator detailed and applied different translation-related procedures and skills to ensure the most accurate and advocate message communication.

Being part of a society means interacting with people from different backgrounds and knowledge, making certain groups feel left behind or secluded from the rest if they cannot speak the same language. Taking this into account, some minorities have been “separated” from society just by their language; restricting their communication and interactions. This investigation considers those differences, takes the two Source documents from English and Spanish; and translates them into the other language to give clarity and information about this problem to other minorities in the country; while ensuring the proper application of translation methods and specialized terminology.

With this intention, “The race in the workplace: the frontline experience” document, provides data and experience from Black, Latino, and Asian workers in the United States market. Their need for opportunities to move to a higher role is quite limited and the influence of their social background and race represents a bigger limitation. In the hopes of impacting this deficiency and helping the race minority population to raise their voice, especially the Latino hand, the translation of this paper is one of the main focuses of this investigation. On the other hand, “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas

rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela” paper, shows the events lived by different women in different rural zones of Costa Rica; who even though inhabit their country of origin, are still suffering deficiency on payment and medical aid at their daily work. With the translation of that investigation, as a second focus of this paper, the proposition is to bring clarity and information to other English speakers with residency in Costa Rica, to follow proper remuneration policies for any employee they have.

Putting together the two documents mentioned above, the researcher aims to enlighten the target population and give attention to this issue. Therefore, minorities and vulnerable groups will be empowered to speak their truth, noticing a greater exposure of the problem, by being presented to a bigger public with a transcription of both texts. In addition, the translator can demonstrate the different challenges of Human Rights terminology to improve communication and attain comprehension. Furthermore, the researcher can present and enrich a detailed glossary of critical socio-economic and Human Rights-related terminology. All these to prove the effectiveness of message translation from the original texts to the target ones.

1.4 Antecedents

“The race in the workplace: the frontline experience” document, was published by McKinsey and Company Firm in July 2022. The paper was created by a department focused on teaching and discussing how to increase the inclusion of different minorities in leadership positions for companies and institutions around the world. Unfortunately, the document has only been published in English, as McKinsey & Company’s Official communication Language is English. Given that the document was created and directed to race minorities in

the United States, such as Black, Latino, and Asian workers, publishing the paper in other languages became a necessity for the Firm. In order to increase this information's accessibility to those minorities, the translation of the paper from English to Spanish is one of the focuses of this investigation.

At the same time, “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela” is a thesis printed on 2023 by Valery Corrales Marchena, Naomi James Chaves, and Yoseth Vargas Carranza, students at the Universidad de Costa Rica. This paper was built with a social focus, on providing consciousness and aid to the different women in vulnerable situations in Costa Rica. Even though the document is intended for Spanish speakers in Costa Rica, there is a big English-speaking population in the country, as many North Americans like to move to Costa Rica because of the climate and biodiversity. In addition, many English speakers migrated their businesses to the country, and they employed locals for different roles, especially cleaning, caregiving, and manufacturing. As employers, is needed for the English speakers with residence in Costa Rica to know and understand the needs their employees have, as most of them are from rural or vulnerable zones, and they can achieve that through the translation of the paper mentioned above.

In aims to provide a coherent, natural, advocated, and effective translation throughout both documents, it is imperative for the translator to analyze and understand other investigations related to Human Rights or vulnerable populations in both countries. In a thesis written by Fernandez Abarca (July, 2022), which explains and detailed a document about gender equity and women empowerment, and how the gender discrimination affects global justice and transforms society; giving an extended quantity of Human Rights-related terminology was considered during the translation of the English to Spanish document.

Moreover, as Fernandez Abarca's document was originally in English and translated to Spanish, can convey a proper translation from Spanish to English on the document "La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela" as both discussed women's rights and the necessity for equity of opportunities for them, enhancing the naturalness and understanding of the message within the whole document. Accordingly, the recurrent use of acronyms within the paper and its translation extends the formality, vocabulary, and tone of the document, producing a richer communication and message conveyance that can be of use to any translator. Aside, from the methods applied by Fernandez Abarca on translation, it is possible for this researcher to notice effectiveness and accuracy between the original and target message.

Related to Human Rights specialized terminology, the thesis developed by Navarro Morua (April, 2017), titled "Analysis and Evaluation of the Translation Procedures Found in the Documents "Extreme Poverty as a Human Rights Violation" from English to Spanish a Thesis by César Manso-Sayao Atmetlla; and "Gestión para la Transformación Social" from Spanish to English for Parque la Libertad"; presents terms and vocabulary relevant and related to vulnerable populations such as the ones analyzed on this current investigation. In addition, Navarro Morua created a glossary for both translations, developing richer and more detailed guidance on socio-economic and Human Rights-related terminology and how to apply it for future investigations. Furthermore, Navarro Morua's investigation introduces a variety of organizations and the articles and rules they followed, which even though do not directly apply to all countries and regions, the overall ideas and articles are similar to the policies in Costa Rica, complementing the terminology and word choice throughout the documents. Besides, as both translated documents by Navarro Morua have a Human Rights-

related tone, the formality, vocabulary, and methodology applied to the translation process can provide a clear and upstanding guide for other researchers. Equally important, throughout the whole document can be noticed the coherence, naturality, and relevance of the topic are addressed through specialized terminology, giving any new investigator powerful tools to advocate to the original message during a translation.

Similar to the two previously mentioned thesis, another appropriate thesis was written and published by Shen Su (April, 2018), who translated a document from Spanish to English about a manual for citizens to apply for family benefits at Caja Costarricense de Seguro Social in Costa Rica, which contains Articles and Norms with specialized terminology. Accordingly, the glossary developed by Shen Su includes a variety of Human Rights-related terms and vocabulary, accommodated to the translations held in this current investigation. Furthermore, Shen Su conveyed significant naturality and coherence within her whole translation and word choice on the document, letting future analysts study and analyze her paper for guidance on achieving the same logical communication from the source text to transfer it to the target one successfully.

Another applicable thesis is the one published by Aguilar Calvo (December, 2020) which translated two documents about alcoholism and related consequences and sickness; even though are not directly related to Human Rights, they do implement specialized and Human Rights-related terminology within the whole document. Moreover, Aguilar Calvo applied different methodologies during her translation process, which will be explained and taken into consideration within this investigation. Besides, Aguilar Calvo created a bilingual glossary that contains a substantial quantity of terminology relevant to Human Rights and its translation into both languages, Spanish and English. Coupled with this, some sections of the translations done by Aguilar Calvo do not seem natural and even show poor word choice,

which can help this current investigation avoid such decisions and ensure carefully selected words and terminology when applicable.

Alternatively, a thesis written by Zolezzi Hernandez and Miranda Bao (December, 2021) discussed and presented a document with a detailed analysis of the importance and effects of a proper salary and benefits for formal and informal workers in Costa Rica. Their analysis explored and presented the salary contrast between formal and informal workers, especially women, and the constant struggle for wage equity in different job departments and positions, which is related and applicable in terms of topic and terminology for “The Race in the workplace: The frontline experience”; that also discussed wage and benefits deficit for vulnerable populations. Additionally, Zolezzi Hernandez and Miranda Bao presented institutions acronyms and government policies applied in Costa Rica, that can help and enrich the translation of the document “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela”, the second paper translated in this current research.

1.5 Scope

This research explores the impact of the translation procedures to provide a relatable and comprehensible document for the targeted audience. In addition, it develops a detailed and extensive glossary for Human Rights terminology, allowing current and future investigators to use it for their own research. Subsequently, seeks to inform and give visibility to the impact of wage deficiencies and limited job opportunities to minorities, either in the United States or Costa Rica. In order to achieve that, the idea of this paper is to translate two documents: “The race in the workplace: the frontline experience”, from English to Spanish;

and, “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela”, from Spanish to English; by applying specialized Human Rights translation techniques, which enhance accessibility, and appeal to cultural sensitivity and engagement with target audiences. Finally, by putting it all together, the translator can evaluate the effectiveness in transferring the original message to a culturally relevant and readable target message.

CHAPTER II

Theoretical Framework

Translation is a process that has been constantly developed throughout decades by multiple professionals and specialists; and thanks to that evolution, different theories, methods, and procedures have been created or standardized for future translators to apply, or even incorporate to perfect their own translation processes. To ensure that a translated text is efficient and natural, and it provides the proper message with the tone and intention of the author, it is necessary to go through a long and specific process. The following chapter will discuss the different methods and preparations that a translator should follow to deliver the desired efficient and appropriate translation. This chapter will explain step by step the preparation and analysis of the documents to be translated, the different text styles that can be present on the documents, while also the function of the text. In addition, there will be detailed two methods and seven procedures that can be applied for translation; accompanied by the process to create a translation glossary and its relevance for translators and the translation process itself.

2.1 Text Analysis

When a translator needs to start working on a document or multiple ones, the first step is to read and analyze the text thoroughly. As mentioned by Seresova and Brevenikova (Sep, 2019) “During the process of understanding the source text, the translator first identifies the meanings of words and their relationships at first in sentences, then in paragraphs and individual parts of the text and finally throughout the entire text.” (p. 3) Meaning that it is not only necessary to read the document, but also, to read it multiple times, allowing the translator to get a grasp of each word, phrase, paragraph, and their relationship with each

other in the whole text. Text analysis would also permit the translator to collect and search for complex or unknown words or phrases for future steps in the translation process; or to define terminology for further investigation to gain and provide a proper context within the whole translation.

After reading the document for a general idea of the message and purpose of it, and collecting all the intricated words and phrases, the translator can re-read the text to determine the important factors in the source document, such as *who?*, *why?*, *for whom?*, and *what?* (Seresova and Brevenikova, 2019); all these questions can clarify the purpose and audience of the original text, together with determining the proper purpose and audience of the target document. These questions can also simplify the understanding of the methods and procedures that will be explained in the following sections of this chapter. Furthermore, by analyzing thoroughly the text multiple times, the translator can ensure a neat and full understanding of the message, which can enrich and secure an appropriate and efficient translation.

2.1.1 Text Styles

After determining the audience, the message, the keywords, and the purpose and tone of the text through the text analysis step, the translator can move on to establish the text style and its use during the whole translation of the document. The text style can determine the type of phrases and fragments to be found in the text, as it establishes a perspective of the original author, and allows the translator to dictate the next factors for the translation procedure. Based on Newmark's analysis in 1988, there are four text styles, narrative, descriptive, discussion, and dialogue.

2.1.1.1 Narrative text

Based on Cameron and Dempsey (2019) narrative text uses or consists of stories to provide information or entertainment to the audience. There is always a person or hero whom the whole story and evolution of the events happen around or are based on. The whole story is centered and customized to that specific person. (p. 3) This means that as its name suggests, a narrative text tells or “narrates” a story, which makes difficult its translation as the purpose is to entertain and amuse the readers, increasing the difficulty level of the word-choosing process. Moreover, the translator should be cautious in conveying the proper meaning of the text, as equivalence in terms of meaning is more important than exact word choice in the translation, to make the translation understandable for the target audience. As the narrative text tells a story, it guides the translator to focus more on the message reproduction into the target language; however, it could mislead the translator in missing the entertaining part or tone of the source text.

2.1.1.2 Descriptive text

Per Huang (2015) “Descriptive Translation Studies (DTS). DTS arose in the 1970s and replaces “equivalence” with “norms,” which serve as the core conceptual tool. Source texts are put aside for the time being and the stress is put on objective description of the translational facts within the target culture.” (p. 2) Meaning that this style of text is mainly focused on concepts and descriptions, rather than the whole understanding of the text. When a translator needs to work on a descriptive text, word choice is highly complex and becomes the objective of the translation, as the efficiency performed during word selection will determine if the description provided was accurate or not. Unlike narrative text, descriptive text style needs to convey proper descriptions and concepts, meaning that the overall message is not as important as punctual sentences and paragraphs related to the specific descriptions.

Besides, the descriptive text may lack an emotional tone within the text as the focus of the author might be to present assertive definitions.

2.1.1.3 Discussion text

In the case of discussion text, per Ting & Chai (2013) “discussion texts begin with an open statement of the issue for discussion and do not include a stance” (p. 69) Stating that the discussion text is focused on an issue or topic to be discussed throughout part or whole text; however, it does not have a stance at the beginning, but it can be developed along the text. Moreover, discussion texts can be seen as an exchange of thoughts, ideas, or information between two or more parties; meaning that it must contain coherent and fundamental arguments within it. Discussion text can be of three different types, one sustaining or supporting a side of the discussion, a second one embracing a side of the discussion but rejecting the other side; and a third one that only presents the two sides of the discussion, providing the pros and cons of both sides, but not concluding or reinforcing on the support of one above the other.

2.1.1.4 Dialogue text

Dialogue text includes or is centered around different characters’ or people’s dialogues; however, based on Bakhtinian, referenced by Klungervik (2006), there are different dialogues, first, the internal dialogue which is specific to the conversation of a person talking to oneself; and second, the external dialogue, that is the interaction with other individuals, and it can be verbal, non-verbal, or both. (p. 2) Both types of dialogues can be present in a text, either in different sections or at the same time. Although internal and external dialogue seems to be the only ones, Klungervik (2006) added that Bakhtinian mentioned the existence of the dialogue between an author and translator, as a translation includes “the voice” of the translator, as within the word choices on the translation, the translator puts a part of their experience and knowledge, providing their essence on the

document. (p.4) Providing the translator with an implicit higher level of difficulty, as they have the responsibility to ensure that their “voice” during the translation process, does not affect or modify the initial “voice” or thoughts of the original author.

2.1.2 Stylistic Scales

After determining the text style, the next step to follow is to dictate the stylistic scale of the text, which allows a translator to identify the type of vocabulary applied by the author of the original text and needed for the target document. Newmark (1988) also states that a translator must analyze the readers of the source and target text as it can provide clarity on the different scales of the document. Based on Heylighen and Dewaele (1999) who cited Bell (1984, 1987) there are three types of scales: scale of formality, scale of generality, and scale of emotional tone.

2.1.2.1 Scale of Formality

This scale dictates who the audience of the text is, and it is based on the type of language used in the document, or as its name suggests, how formal is the vocabulary. These scales determine if the document to be translated conveys a high, mid, or low level of formality within the whole text. Per Newmark (1988), there are eight different scales of formality: *officialese*, *official*, *formal*, *neutral*, *informal*, *colloquial*, *slang*, and *taboo*.

Officialese is defined by the Cambridge Dictionary as “the type of language, often used in government documents, that is formal and often difficult to understand” (n.d.) This is the highest scale of formality, as it is highly complex and is usually used for formal government documents. It also presents vocabulary that is not commonly used and even comprehends terminology from other languages, such as Latin. Then, the *official* which still handles high formality, but its complexity of vocabulary is less than for *officialese*, making it a little bit more understandable. *Formal*, as its name suggests, carries a certain level of

formality, but it is more natural for readers; as it is well structured, logical, and coherent, and still maintains a high level of terminology within the whole text. Then, on a mid-formal scale, is the *neutral*, which has no emotion or intention from its author, it is used to inform and provide facts but has no evidence of intentionality, as it also seems to provide information to its readers.

Moving on to the lower scales of formality, there is the *informal* style, per Newmark, this one can also be called intimate or casual, as it is the one used daily (1988, p.14) It is easy to understand and has a simpler vocabulary, allowing the readers to identify with it; and it can even contain some contractions. Then, the *colloquial* style, as its name suggests, includes colloquial terminology, which reduces its level of formality, and is applied during relaxed situations; it is more commonly used in speech than in writing; however, when written it has subjective language and more contractions. The following type is *slang*, and as defined by Merriam-Webster Dictionary, it is “an informal nonstandard vocabulary composed typically of coinages, arbitrarily changed words, and extravagant, forced, or facetious figures of speech” (n.d) It is commonly referred or used by a specific group, has low vocabulary and applies a high number of contractions and idioms. Finally, the *taboo* type involves the use of forbidden, political, or morally incorrect words or terms that, in some cases contain offensive stances to the readers.

2.1.2.2 Scale of Generality or Difficulty

The next scale is to determine the generality or difficulty established by the complexity of the text. Newmark (1988) divides them into simple, popular, neutral, educated, technical, and opaquely technical. Starting with the lowest complexity, the first is *simple*, which uses the less difficult terminology. Then, *popular* incorporated daily life vocabulary, which had a low but still certain level of complexity. The following is *neutral*, that it is at a

middle point of complexity, neither too difficult nor too easy. It contains a certain amount of complex terminology, but it also carries simpler or commonly used terms.

On the higher side of the scale, there is the *educated* level, which refers to instructional texts, such as school and university textbooks, which cover a higher level of difficulty, but still comprehensively to its readers. Its difficulty may vary depending on the audience to which the text is oriented, as terms for university students will be more complex than those used for kids and teens. *Technical* level refers to a more specific terminology, which includes a certain level of expertise for its comprehension and readability. And finally, the *opaquely technical* level is even more specific than technical and can only be understood by readers with higher expertise on the topic or who are familiar with the terminology applied.

2.1.2.3 Scale of Emotional Tone

The third type of scale is about the emotional tone of the text, which similar to when speaking, in writing processes provides context and the author's desire or intention to achieve through the text. Based on Newmark (1988) there are three types of emotional tone types: intense, warm, and factual. In the case of *intense*, it uses intensifiers, or as defined by Merriam-Webster Dictionary "one that intensifies" (n.d.) Meaning that the text has multiple adjectives or expressions to intensify or emphasize the following noun or topic to be discussed in the text. On the other hand, the *warm* type is inviting, it looks for the audience's comfort and welcomes them. And for the *factual* type, its center is on giving facts and information, there is no search for giving emotions to the audience, just information; it can even be called cold.

2.1.3 Text Function

A text function is defined by Nord (2005) as “The communicative function, or the combination of communicative functions which a text fulfills in its concrete situation of production/ reception” (p. 77) Meaning that as translation is a communication process, the translator needs to understand entirely what the function of the message on the document is to be translated, to transfer it correctly to the target document. Moreover, Reiss (1976) stated that in translation, equivalence should not be limited to words and phrases, but to the whole text, including what is not noticeable at first sight. They also stated that depending on the type and function of the text, the translation method should be decided. There are three different types of text functions, informative, expressive, and vocative which will be explained below.

2.1.3.1 Informative

As its name states, the informative text function is to provide information, more specifically facts. The idea of this type of text is to keep its readers informed with factual and even scientific knowledge. Aside, from illustrating better the informative function, Newmark (1988) separates this function into four different styles. The first is the formal and non-emotive style, which is used for academic purposes and is based on technical vocabulary. The second one is neutral or informal, it provides information and a low-level technical vocabulary that is directly defined within the text in the first person, to give context to the readers. The third type is the informal warm style, which presents scientific information of common knowledge or even art books with simple grammatical structures. The fourth type is familiar, racy, non-technical style, applied to popular journalism, using metaphors, and even adjectives before proper names, and colloquialisms.

2.1.3.2 Expressive

On the other hand, the expressive function is about showing or “expressing” the author's point of view and not necessarily based on any facts. Therefore, even when it can contain facts within the text, the author might position them in a format to sustain their ideas or thoughts. Newmark (1988) also defined the expressive function in three main types: serious imaginative, authoritative statements, autobiography, essays, and personal correspondence. The first type, serious imaginative is applied to lyrical poetry, short stories, novels, and plays, which applies metaphors and other literary figures to present the author’s perspective. The authoritative statements are related to authorities, such as ministers or governors; this type can also apply to people with high linguistic access. Finally, autobiography, essays, and personal correspondence referred to as “These are expressive when they are personal effusions, when the readers are a remote background” (Newmark, 1988, p.39) Stating that they were not created for a specific audience or even to be read by another person, then the author.

2.1.3.3 Vocative

In the case of the vocative function, the idea of the author is to generate an effect on the readers, it can be for them to support a statement, or to fight against it. The vocative function is usually related to persuasive texts, propaganda, publicity, and even popular fiction. Newmark (1988) mentioned that there are different factors presented on the vocative function: the relationship between writer-reader, and the comprehension of the written text. For the writer-reader relationship, there are specific grammatical forms to convey it, like formal versus informal, imperative, subjunctive, passive, and others; all these with the relationship of power, request, or persuasion. In the case of the comprehension of the written text, Newmark (1988) states that any text needs to be written in a language that the readers can understand, at their linguistic and cultural level.

2.1.4 Translation Methods

After analyzing the text, determining its style (narrative, descriptive, discussion, dialogue), its scales (formality, generality, and emotional tone), and function (informative, expressive, vocative), the next and final step is to establish the method needed to perform the translation. Based on Mohamed (2022) “Among the existing translation methods, two methods are intensively being compared and debated over semantic and communicative translation.” (p.86) Per his analysis, the semantic method connects literal and free translation, while the communicative one can remove or eliminate words or sections to attain understanding for the readers. Both methods are used nowadays and have their pluses and cons depending on the type of translation that wants to be achieved, and the intention of the original author and message.

2.1.4.1 Semantic translation

Mohamed (2022) states that semantic translation is very identical to literal translation, as it analyzes the meaning of words within the source text, and it produces a translation that its semantic and syntaxis are the closest to the source text. Also, it maintains the focus on the original culture and does not change terms or expressions to advocate the target culture. (p.89) The idea of this method is to illustrate the culture and context of the source text and emphasize the same tone and expressiveness portrayed in the original written work. Although semantic translation searches to demonstrate the author’s thought process, in some cases when applying the word-by-word translation, the meaning of the phrase, sentence, or even the paragraph can be lost.

Mohamed mentioned some challenges for the use of semantic translation, mostly related to the "literal" translation, as not every language has an exact meaning for each word that exists in the other language, causing complexity during the word mapping to the “right” translation. (2022, p.89) For example, in English, the words “fingers” and “toes” refer to

specific parts of the body, however, in Spanish, “dedos” works for both terms but it is not a literal translation as it is needed to specify if they are *fingers* “dedos de las manos” or *toes* “dedos de los pies” Also, the other two challenges are the use of idioms and phrases which are hard to understand by the translator or are hard to translate due to their meaning and cultural approach.

2.1.4.2 Communicative translation

On the other hand, for the communicative translation, the main point is to transfer the idea and meaning intended by the author on the source text, allowing the audience to connect on a deeper level with the message and the author’s intention, translated to a culture and approach they can understand. Mohamed (2022) added “Communicative translation focuses more on the social aspect, concentrates on the message and the main force of the text and is always written in a natural and resourceful manner.” (p.92) Meaning that rather than focusing on the lexical and grammar applied on the source text, the translator focuses on communicating the message with the intension of the original author and determines the word or phrase choice based on the social and cultural environment of the target audience.

Same as with the semantic method, the communicative method has some challenges such as the loss of semantic concepts and the decision-making process. Mohamed explained that the decision-making process during translation is influenced by the translator’s aesthetics (subjective), their knowledge and understanding of the culture, beliefs, and values; and the specifications or limitations presented or requested by the client who requested the translation of the source text. (p.92) Establishing that even though the translator chooses words and phrases focused on the message transmission, it does not mean that it is the only “correct” or “proper” translation, but rather the one selected by the translator based on their experience, knowledge, and understanding of the source message. For example, the idiom “spill the beans”, does not have a standardized translated version in Spanish, in some regions it might

be translated as “soltar la sopa” or “descubrir el pastel”, both phrases imply the same meaning but the translation will depend on the translator exposure or knowledge of each phrase.

2.2 Translation Procedures

Walinski (2015) mentioned that Vinay and Darbelnet (1958) do not accept the idea of considering individual words as units during translation, as within a text the translators interact with ideas and feelings in different fields, and not with individual sections only. Walinski (2015) explains that “The translation shift occurs when rendering a translation for a particular segment of the text requires the translator to break the formal correspondence between surface structures functioning in SL and TL.” (p. 57) Meaning that the smallest division or segment on a text will be determined by both structures, the Source Language, and the Target Language, and the correlation between both. But also, both languages will limit the rendering of the different phrases or sentences within the text, as translation does not imply adding information.

Vinay and Darbelnet (1958) first separated the translation procedure into two big methods: direct translation and oblique translation, which are also divided into smaller groups. Direct translation includes borrowing, calque, and literal translation; and oblique translation is separated into transposition, modulation, equivalence, and adaptation. Aside, there are other different procedures like omission, amplification, explicitation, and punctuation changes, which are smaller subdivisions. Within this section, some of these procedures will be presented and explained in more detail.

2.2.1 Transposition

Tronch presented transposition as “A change in the grammatical category from SL to TL (singular to plural; position of the adjective, changing the word class or part of speech)”. This is related to the structure of each language, as it might vary from one language to the other to follow its respective grammatical or lexical rules; for example, the grammatical order in English for an adjective modifying a noun is *adjective + noun*. However, in Spanish, the adjective usually goes after the noun, even depending on the emphasis or function desired for it, the adjective can be before the noun. In Spanish can be used “dulce miel” or “miel dulce”, with both being grammatically and syntactically correct, but their meaning is different on each, as in the first the adjective adds more quality to the noun, while the second one is just describing a characteristic of the noun.

2.2.2 Modulation

Zakhir (2003-2024) explained “modulation occurs when there is a change of perspective accompanied by a lexical change in the TL.” This procedure aims to avoid awkwardness in the translation, even when it is grammatically, lexically, and syntactically appropriate. The idea of this process is to provide naturalness while keeping the original meaning of the phrase or sentence originally presented. For example, in English, a phrase like “from head to toe” means the whole body; nonetheless, in Spanish can be translated as “de la cabeza a los dedos”, but it does not sound as natural as the common phrase “de la cabeza a los pies”, which is not an exact translation, but its meaning is the same. Besides, modulation can also be used to transfer the same message but in a different way, for example, “its texture is soft” and “its texture is not hard” which convey the same meaning, but one sounds more natural than the other, depending on the context.

2.2.3 Omission

Molina and Hurtado Albir (2002) defined omission as “This is to omit redundancy and repetition that is characteristic of the SL,” (p.504) This procedure allows the translator to omit specific words which can create confusion or redundancy when translating them into another language. For example, if in English is used a phrase such as “close proximity” to avoid redundancy, it can be directly translated to be “close” or “proximity” in Spanish, avoiding the repetition of words, but also keeping the same meaning of the original text. It also works on the other side, as Spanish is commonly used redundantly “subir arriba”, which in English will make no sense as both words mean up.

2.2.4 Amplification

In this case, Mahatma Agung (2016) explains that “amplification is applied by using more words in the target text to cover syntactic or lexical gaps.” (p.204) This procedure is mostly used when a word in the target language does not make sense by itself but needs another supporting word to have equal meaning and proper grammatical and lexical completion to the one on the source language. This method can be applied mostly when translating compound adverbs from English to Spanish, and verbs from Spanish to English; for example, “going upstairs” will be “subir las escaleras” as *upstairs* implies going up the stairs, there is only one word needed, rather than in Spanish which needs to clarify with another word if it is going up or down. For Spanish to English, an example can be “encender la television” which in English is “turn on the television”, which in Spanish is a one-word verb that is translated as a two-word verb.

2.2.5 Explicitation

“Explicitation is generally defined as a shift in translation from what is implicit in the source text to what is explicit in the target text.” (Murtisari, 2016, p. 64) As some phrases and words do not directly exist in the other language, there is a necessity to include information to

provide complete context and proper meaning in the other language. Murtisari (2016) also explained that explicitation comes with the translation process itself, as the translator will choose words or phrases that reflect the correct meaning or message from the original text. When translating English into Spanish the most common situation is when there are “genderless” words, that in Spanish do have a gender, and a clarification on which gender is referred to in the original text is necessary, or the inclusion of multiple genders to portrait the same meaning as in English. For example, “a kid” in English has no specific gender; nonetheless, in Spanish either “un niño” or “una niña” as the grammatical rules in Spanish denotes that an article defines or delimits the noun and its gender.

2.2.6 Literal Translation

Mahatma Agung (2016) defined “Literal or word-for-word translation as the direct transfer of source language text into a grammatically and idiomatically appropriate target language text in which the translator’s task is limited to observing the adherence to linguistic servitudes of the target language.” (p. 200) Although most of the time, the literal translation might seem or sound awkward in the target language, there are cases in which it comes in hand or it is the appropriate procedure to apply, as in the case of legal translation, which requires a word-by-word translation. Mahatma Agung (2016) also states that literal translation can be applied when translating two languages from the same family, such as English, Spanish, French, and Italian; however, it might lack naturality and even meaning if applied in all cases; thus, the translator needs to evaluate when to apply it or not. In common situations, literal translation is not recommended as a method to apply all the time, but only in specific cases like legal translation.

2.2.7 Punctuation changes

Per Mogahed (2012) “Punctuation plays a vital role in the interpretation of a certain text. So using it haphazardly leads to misunderstanding the text and consequently the wrong

translation.” (p. 2) Meaning punctuation has different influences on the text: they can connect or separate ideas at different levels, they can provide emphasis or clarification and even can organize the ideas on the text. Although most of the punctuation marks are similar in different languages, at least in English and Spanish there are some variations that can affect the meaning of a phrase, sentence, or paragraph; or can confuse or mislead the readers on the topic. Thus, the use of proper punctuation is part of the translation process, either to convey the correct message from the original text to the target one; or to ensure the proper grammatical structures within the text. An example is the use of *commas* and *semicolons* in English, versus in Spanish; in English, there are different rules to apply a *semicolon*, like when separating ideas that are not as related as using a *comma* but related enough to not use the *comma*; or after three *commas* used, the recommendation is to apply a *semicolon*. On the other side, in Spanish, the *semicolon* is rarely used, it can be present in academic or instructional texts, and the most common use is to separate related ideas, that contain other commas within, however, even in these cases, is rare to see its use on written text.

2.3 Glossaries

As defined by Merriam-Webster Dictionary (n.d.) a glossary is “a collection of textual glosses or of specialized terms with their meanings” Even though dictionaries do provide different meanings for words, a glossary contain not only the meaning of the specialized terminology but also its context for a proper understanding, and other information which will be detailed within this section of the chapter. Glossaries became part of the translation process to give a tool for future translators, but also, to prove the knowledge, expertise, and time spent by a translator when translating and collecting the complex terminology to present on the glossary. In addition, a glossary contains vital information for the translation process, as it contains any complex or specialized term needed to comprehend the text, allowing the

translator to ensure a coherent and natural translation, conveying the correct message.

Besides, the readers can have a practical definition, explanation, and context for specialized terminology.

Based on Gapper's (2008) system, creating a glossary, or “a terminology management manual” as she calls it, needs to take into consideration multiple factors: define the terminological needs of the translator, the compilation and analysis mechanism to be applied to complete the glossary, the specialist requirements on a specific field that the glossary will be directed to, and the organization of the content. (p. 14-15) All of these factors must be considered when designing and creating the glossary to ensure its productivity and comprehension, either for the translator creating it, or the future readers of their work.

2.3.1 Relevance for the translator

Glossaries are a tool, either for its creator or its future readers as they contain the meaning and context of the words and phrases used by the translator throughout the whole document. Multiple words in a language can have various meanings depending on the context they are used, making the word-choice process a complicated and time-consuming process for a translator. To ensure the proper translation of a term, especially with complex terminology, a translator can be supported by the glossary, as it can enclose the meaning of the word or phrase needed; but also, it provides context and purpose, allowing the translator to ensure proper use of the term. The glossary aids translators in ensuring that each key term is used correctly and consistently throughout the target text.

Glossaries significantly assist translators and the translation process by enhancing the quality and consistency of a translation. They eliminate uncertainty, aiding in the selection of appropriate terms during translation, reducing the time spent on researching and correcting similar terms, and making the text content understandable for both the reader and the

translator. Moreover, it minimizes errors in text comprehension and ensures the work is consistent and accurate across the entire document. Glossaries can also enrich the translator's vocabulary and expertise on the topic, especially if they create a specialized glossary; part of the creation process is to perform detailed research and meticulously study other glossaries related to the same topics.

2.3.2 Relevance for the translation process

As a glossary is a tool for a translator and the target audience, it enriches the whole translation process. When a translator invest their time in collecting complex terminology, organizing it, contextualizing it, and placing it in a glossary, they ensure efficient and effective use of the terms throughout the whole text. Therefore, the translator can ensure that the context and meaning of the terms are the expected and applicable ones for the translation. As mentioned before, part of the process of creating a glossary is to investigate and review other specialized glossaries; meaning that each glossary created by a translator is a future reference and guide for other translators working on the same or similar topics.

The creation and use of glossaries increase the productivity of the translator and secure them a correct word choice as they can standardize a translation for the whole document. The glossary provides meaning, context, purpose, and other specific and relevant information that will be detailed in the *How to create a glossary* section in this chapter. Besides, as a glossary accommodates specialized terminology, it connects each term to the other, and supplements the target document with coherent, natural, and effective terms, based on investigation.

2.3.3 How to create a glossary

A glossary is a detailed, well-structured, and organized document for translation, meaning that it needs to follow a specific order to ensure its efficiency. Based on Gapper's

(2008) process to create a glossary, there are three main steps to follow: determine the nature of the glossary, define the content, and define the format of the glossary. Other characteristics such as field of study, category, and applicability will be determined when preparing a glossary.

2.3.3.1 Determine the nature of the glossary

First, it is essential to understand for whom the glossary is?, how is the expected user of the glossary?, what will it be primarily used for?, and when and how will be used the glossary? (p. 84) When answering these questions, the translator can shape and prioritize accordingly each term in the glossary; while also, defining the order and selection criteria for each terminology and its characteristics.

2.3.3.2 Define the glossary content

Second, the content of the glossary must be established, taking into consideration three main characteristics: which terms will be included, the information to be included about each term, and extra information to be offered when needed. For the terms to be included, not all terminology will be in the glossary, as some terms will lack interest or will be more common than expected. Determine the selection criteria for the terms to be included in the glossary can be: terms from a particular topic or field, terms not found in general dictionaries, fundamental terms for topic comprehension, and other options such as expressions, acronyms, names, etc. (p.84) By defining the glossary users and their characteristics, but also, the time and place to apply the terminology, each term's characteristics to be taken into consideration, will become clearer and properly justify their addition.

For the information to be included in the glossary about each terminology, Gapper (2008) recommended: terms, grammatical categories, definitions or explanations, equivalence in the target language, and equivalence in the source language. (p. 84) Gapper (2008) also

advises to include definitions only when necessary, as most of the glossary readers will be specialists searching for equivalent terms, rather than definitions. (p. 86) However, there are multiple types of definitions, and some can be productive to have in the glossary. The frequent definitions are *proper* (general definition), *encyclopedic* (detailed definition), *complete* (linguistic and detailed definition), and *terminological* (concept definition, and distinction from similar terms). (p. 88) Other definitions used for specific reasons can be *hybrid* (lexical information and grammatical data), *hyponymic* (term definition based on a superior category), *improper* (definition from a grammatical perspective), *linguistic* (words information, not concepts), mixed (lexical and encyclopaedical information), by application (defined by its use), among others. (p. 88-89)

Gapper (2008) added that equivalences are highly recommended to be included, as the most frequent users of the glossary will be other translators and specialists; nonetheless, if the grammatical category of the terms is not the same, it is suggested to add an example that sustained the proper use of the terminology, ensuring the proper understanding and application of the text. (p. 90) Besides, extra information to be included can be a field of study, usage, chronological, geographical, and sociological indications, gender, singular/plural, scientific name, acronyms (as some terms will be better known per their acronym), among others. (p. 91-92)

2.3.3.3 Define the format of the glossary

The third and last step is to define the format of the glossary, which Gapper (2008) recommended to determine the order of the terms (alphabetical), then the order of the aspects for each term, and specify the font type and size per aspect. (p.84) Other formatting characteristics like uniformity in the use of **bold** and *italic* font can facilitate the use of the glossary. (p. 93) The space dedicated to each term may vary, but needs to be established with the format of the glossary, and should take into account:

- How will the information be presented? In one or two columns? (p. 93)
- What is the page and font size to be used? (p. 93)
- Will there be space separating each entry? (p. 93)
- Will use any indentation to separate entries or certain information? (p. 93)
- Will there be use of color-coding to emphasize specific aspects? (p. 93)

Grapper (2008) also mentioned standardized distinctions like **bold** or *italic* to distinguish uses, specialties, or grammatical categories. And *arrow* to lead the reader to another related term, or in case of frequent use of abbreviations to provide instructions, it is necessary to create an *abbreviations guide*. (p. 93) Another aspect to take into account is the proper alphabetization, as in glossaries it is common to have multiple terminologies with a similar format of various words, but all are different. For example, “English as a foreign language” and “English as a second language”, as both are different terminologies, should be separated, but their order should follow the alphabet, “English as a **f**oreign language”, before “English as a **s**econd language”. Finally, Grapper (2008) explained that after determining the nature of the glossary, the content to be added, and its format; the glossary needs to be checked and corrected if needed. (p. 98) She provided a checklist to review the glossary:

- Do all entries have the same format? Punctuation between elements and after each entry, font type (**bold**, *italic*, etc.), capital letters usage.
- Do all entries have the same elements’ order?
- When including definitions, do all have clear and comprehensible language based on the instruction level of the users?
- Are all definitions composed of terms of the same grammatical category as the defined one?

- The entries' alphabetical order was proven? Was used only one alphabetical system?
- Was finished with an orthographic revision?
- Was it clear the meaning of all abbreviations?
- Was there uniformity within spacing and margins?

After all these revisions, Grapper (2008) recommended distributing the glossary to a limited number of users, to review and use daily, to ensure any possible error or issue. (p. 100)

CHAPTER III

Methodological Framework

To provide the proper information and analysis on this research is of great importance to define the methodology to apply to the translation of the two documents, from Spanish to English, and vice-versa. However, it is needed to first define what methodology is, and Merriam-Webster Dictionary states it is “a body of methods, rules, and postulates employed by a discipline : a particular procedure or set of procedures” or “the analysis of the principles or procedures of inquiry in a particular field” (n.d.) Meaning that within this chapter will be presented, and detailed all the methods and procedures applied during the translation of the documents in this research. Additionally, not only the methods will be explained, but also, the analysts will provide the characteristics to support each procedure selected, in order to achieve the desired objectives of the investigation.

3.1 Research Approach

When leading or developing research, an investigator needs to have clear the type of approach that the whole analysis needs to follow. There are three options that a researcher can use, the qualitative approach, the quantitative approach, and a mixed version of both. In terms of translation, which is the focus of this investigation, the recommended approach is to apply a mixed approach. Streefkerk explains that “Quantitative research is expressed in numbers and graphs. It is used to test or confirm theories and assumptions. This type of research can be used to establish generalizable facts about a topic.” (2023) Explaining that to apply a quantitative approach, numbers are the key to obtain the needed results; as it requires the analysis of a high number of subjects or data to get to the proper conclusions. Moreover,

it is centered on providing generalities and deducting conclusions from the standardized study of information.

On the other hand, qualitative research is defined by Streefkerk as “Qualitative research is expressed in words. It is used to understand concepts, thoughts or experiences. This type of research enables you to gather in-depth insights on topics that are not well understood.” (2023) States that this research approach is based on interpretation and understanding of the information collected; it is focused on the quality of the content of the data analyzed on the investigation. Thus, a mixed research approach has both characteristics, has the quantitative side, as it collects a number of data or subjects to be analyzed; and then, on a qualitative basis, the information is interpreted to provide results attaining the objectives of the whole research.

As translation is based on terminology collection, depending on their natural, coherent, and accepted use, a translator can determine the proper use of a phrase or word-to-word sentence, based on the *quantity* of uses of it in other investigations. While also, interpreting the meaning and proper use of the words, phrases, or sentences, based on the *quality* of the documents, and previous translations. Putting these two approaches together creates a mix of research, and allows a translator to establish and follow a proper translation process with a coherent and natural research approach, ensuring of the application of the best analysis approach.

3.2 Research Design

According to Jansen (2023) “Research design refers to the overall plan, structure or strategy that guides a research project, from its conception to the final data analysis.” (p. 2) The research design is directly related to the research question, and general and specific

objectives, as it will guide the investigator to use the proper methodology to fulfill them, but also avoid misleading the analysis to not related or not significant points within the whole investigation. To determine the proper design for the research is needed to learn the different types; first, for quantitative approaches, there are descriptive, correlational, experimental, and quasi-experimental; while for qualitative, there are phenomenological, grounded theory, ethnographic, and case study. (Jansen, 2023, p. 3-10) For this investigation, the investigator decided to develop the quantitative descriptive design as there is a need to collect data for the translation, especially for the specialized Human Rights-related terminology used within both documents; as the translation of these terms required detailed investigation to ensure of the best equivalence on the other language. Moreover, there is an application of the qualitative phenomenological research design as it involves the understanding of people's thoughts and experiences, which need to be considered within a translation, to attain coherence, naturality, and proper message communication from the original author, to properly deliver it to the target audience.

3.3 Information Sources

Per Nottingham University there are three sources of information: Primary sources, such as journal articles and conference papers, are where new research or theories are first published. (n.d) Secondary sources, for example books, provide a more digested overview of a subject. (n.d) Tertiary sources, such as encyclopaedias, record facts and summaries of the information in primary and secondary sources. (n.d). Any document either physical or virtual, can be a source of information, if it is properly applied to a topic, and its information provides understanding and context for the investigation.

For this investigation, the translator aims to translate two documents: “The race in the workplace: the frontline experience”, and “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela”; one from English to Spanish, while the second one from Spanish to English. Accordingly, as a primary source of information, the analyst will use the different methods and procedures explained in the previous chapter, to apply them within the whole translation process, in order to develop and acquire the proper knowledge and understanding for the documents’ translation. The secondary sources will be used mainly articles and thesis, such as the ones mentioned and briefly explained in Chapter I, in the Antecedents section. And finally, the tertiary sources will be dictionaries and mostly glossaries for specialized Human Rights-related terminology, and any other complex term that will require a review of its significance or proper equivalence in the other language, to ensure the best target document.

3.4 Analysis Categories

The different categories for analysis are taken from the specific objectives of the investigation and will be briefly mentioned within this section. These categories include translation, translation methods, text analysis, color coding, glossary, and challenges or limitations found. They will assist in developing the instruments that will be crucial for the data collection and its respective analysis within this investigation.

3.4.1 Translation

Cambridge Dictionary defines translation as “the activity or process of changing the words of one language into the words in another language that have the same meaning” (n.d.)

Creating a *translated* version of the word, phrase, sentence, paragraph, or text; requires a detailed and attentive evaluation of every element on the document, while also, understanding the grammatical and lexical elements, and any related adjustments needed. The translator needs to evaluate and analyze the text, but also their proper interpretation of the content and information within the documents, to guarantee their understanding of the message and accurately convey it to the translated documents.

3.4.2 Translation methods

According to Mohamed (2022) the translation methods are used to support a translator on the inconvenient that can be found in the translation process. The selection of the methods to apply will depend on grammatical, syntactical, and lexical difficulties that the analyst might face. Either semantic or communicative method will be used depending on which can better convey the message, in terms of content, style, language, and culture from the target language, compared to the ones on the source language. In addition, when determining the translation methods, the analyst can find and examine potential challenges and limitations that will affect the translation process and can determine various strategies to mitigate or avoid these issues.

3.4.3 Text Analysis

Per Seresova and Brevenikova (2019) text analysis is about understanding on a deep and detailed level the text, to ensure its proper translation. (p. 3) The translator needs to ensure the correct text style, function, method to apply and each scale (formality, difficulty or generality, and emotional tone) within the whole text, to apply the proper techniques on the translation process. All these characteristics will be presented and analyzed through a table. Aside, the translator will collect, at first sight, the complex or specialized terminology that will require extra investigation to ensure of understanding its context.

3.4.4 Color Coding

The color-coding system will allow the investigator to determine and categorize each of the translation procedures applied during the translation, allowing the researcher to evaluate and analyze their application in the process. The color-coding system consists of assigning a specific color to each procedure, based on a chart; the chart will provide the respective color for the procedure. This color-coding system will facilitate the process of text analysis and conclusions within the following chapters of the investigation.

3.4.5 Glossaries

Glossaries are a detailed and alphabetical list of terminology containing technical or specialized terms, which allow the readers to get a better understanding of context, definitions, applications, etc. These glossaries also represent a crucial tool for translators, as they provide specialized terminology that can be applied for future translation processes. As glossaries are a tool to gather consistent and relevant information, this analyst intent to create two bilingual glossaries for the investigation, in order to attain the best equivalence and references for future research.

3.4.6 Challenges or limitations found

As this investigation includes the application of specialized terminology, specifically for Human Rights-related terms, the investigator will find challenges and limitations within the investigation and translation process. Part of the objectives of the analysis of the texts is to determine those challenges, such as finding equivalence in the target language, or understanding the context or application of a term per each language. The finding and understanding of these limitations will allow the researcher to determine and attain the proper conclusions in the achievement of the objectives of the investigation.

3.5 Data Collection Instruments

There are multiple instruments that will allow the investigator to collect and afterward analyze the data on this research to find a solution to the problem presented. The text analysis table will guide the translator on the different characteristics of each document to ensure a proper analysis when attaining conclusions for both documents. In addition, the color-coding chart will permit the identification and analysis of the different translation procedures applied within the translation process, while ensuring the correct application of each technique. Finally, two glossaries, one from Spanish to English, and the other from English to Spanish; will let the investigator gather significant information and save them for future references, either for their specialization on the content or another translator who can use this research as an antecedent. Within the glossary will also be included not only the specialized terminology but also the terms that require extra clarification or information for their appropriate equivalence.

3.5.1 Text Analysis Table

	The Race in the workplace: The frontline experience	La feminización del cuidado no remunerado
Text Style		
Scale of formality		
Scale of Generality or Difficulty		
Scale of Emotional Tone		
Text Function		

Translation Method

Table 1. Demonstrate how the text analysis will be executed for the translated documents.

Source: Researcher's own creation

3.5.2 Color-coding chart

Translation Technique or Procedure	Color assigned
Transposition	Blue
Modulation	Green
Omission	Purple
Amplification	Pink
Explicitation	Cyan
Literal Translation	Orange
Punctuation Changes	Red

Table 2. Demonstrate each of the color assigned per technique.

Source: Researcher's own creation.

3.5.3 Glossaries

Spanish term	English Equivalent	Explanation or Definition	Grammatical Category

Table 3. Shows the Glossary format for Spanish to English terminology.

Source: Researcher's own creation.

English term	Spanish Equivalent	Explanation or Definition	Grammatical Category

Table 4. Shows the Glossary format for English to Spanish terminology.

Source: Researcher's own creation.

3.6 Collection Data Process and Data Analysis

The translator will read both documents multiple times; first, to get a general idea of the content and topics discussed within the texts; second, a more insightful read to recognize and analyze the documents, using the characteristics included in the Text Analysis Table previously provided. Third, to find and determine complex terminology which will need detailed research to understand its context, and definitions, and add them to the glossaries. Aside, the translator can re-read the text a fourth or even a fifth time, to re-check the information gathered, and ensure that any missing terminology, either the Human Rights-related terms, the ones with a complex or intricate significance within the text, or any other term which require further clarification or limitation within their translation or equivalence determination; is included.

After gathering all this information, the translator can proceed to establish the proper translation procedures to apply, based on the text analysis done. Moreover, will investigate multiple sources (primary, secondary, and tertiary) to understand and convey the proper significance and context for the specialized terminology or complex terms within both texts. Finally, the analyst will organize, label, and accommodate all the terminology found in the two different glossaries, ensuring that they include their respective equivalence, definition or

explanation, and their grammatical category. Within the glossaries the investigator will consider and include any term or word which might require a further clarification or information within the glossaries criteria; meaning, that any term that needs extra data within their equivalence, context explanation, or grammatical category, will be added to both glossaries if needed.

CHAPTER IV

4.1 Translation English to Spanish

Raza en el espacio laboral: la experiencia de la primera línea de trabajo

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Prefacio

El año anterior, publicamos *Raza en el espacio laboral: la experiencia afroamericana en el sector privado de Estados Unidos*, un análisis en profundidad a los desafíos encarados por los trabajadores afroamericanos en la América corporativa¹. El reporte buscaba proporcionar una base factual para brindar a los ejecutivos un mejor entendimiento de estas problemáticas y así poder desarrollar e implementar programas de soporte más efectivos para sus colegas afroamericanos.

¹“Raza en el lugar de trabajo: La experiencia afroamericana en el sector privado de los Estados Unidos,” McKinsey, 21 de febrero del 2021

Este reporte se basa en nuestro trabajo previo, pero cambia el enfoque a las experiencias de empleados asiáticos, afroamericanos y latinos de la primera línea laboral, un segmento de la fuerza laboral que ha sido típicamente desconectado de las oportunidades de ascenso. Incluso cuando las compañías incrementaron sus iniciativas de diversidad, equidad e inclusión (DEI) a lo largo de muchos años en un esfuerzo por crear ambientes laborales más acogedores y de apoyo, estos esfuerzos con frecuencia no son extendidos a trabajadores más allá de los niveles corporativos.

La primera línea, la cual está conformada por aproximadamente un 70 por ciento del total de la fuerza laboral de los Estados Unidos o 112 millones de trabajadores, representa una oportunidad enorme pero desapercibida para las corporaciones. Nuestra investigación encontró que los empleados de color afrontan una serie de impedimentos para ascender en la escalera corporativa, ellos son motivados a avanzar, pero carecen de oportunidades de ascenso. Una mayoría reporta no tener patrocinadores que brinden soporte y guía, además, los empleados de color pueden no tener un sentimiento de pertenencia e inclusión en sus trabajos, sintiéndose ignorados y marginados rutinariamente.

Estos sentimientos importan ya que, para muchos trabajadores de color, la primera línea es ambos: un punto de partida y finalización en sus carreras; el círculo vicioso de los trabajos que no ofrecen oportunidades de promoción. Este reporte esclarece las trayectorias de la primera línea a la clase media, así como las habilidades fundamentales para los ascensos.

Las compañías pueden aumentar su responsabilidad para apoyar a los trabajadores de color de primera línea e incrementar las oportunidades de transición hacia puestos mejor pagados y más gratificantes. El último capítulo de este reporte ofrece los pasos que pueden tomar las compañías para permitir a los empleados de primera línea el desarrollo de las habilidades necesarias para buscar nuevos puestos.

Queremos reconocer que el racismo sistemático representa un obstáculo adicional para los trabajadores de color en la primera línea. Nuestra investigación y análisis se enfoca en los pasos que pueden tomar las compañías para mejorar los resultados de estos empleados, abordando que el impacto del racismo sistemático requiere de cambios a nivel de sistema, los cuales van más allá del alcance de este reporte.

Somos el inicio de esta conversación sobre la primera línea, más investigaciones necesitan ser efectuadas, tales como cuantificar como las profesiones pueden afectar la satisfacción laboral general, las perspectivas profesionales y económicas de los trabajadores de color.

Adicionalmente, analistas pueden explorar los beneficios financieros y empresariales para las compañías que mejoren el desarrollo, permanencia y progreso de su personal de primera línea.

Esperamos que este reporte proporcione a los ejecutivos un punto de inicio en considerar oportunidades para desbloquear todo el potencial de sus trabajadores de color en la primera línea. El progreso puede cambiar las vidas de millones de trabajadores, pero, más que eso, es lo correcto.

Chris	Bryan	Sofia Soto	Monne	Lareina
Copeland	Hancock	Asesora,	Williams	Yee Socia
Socio	Socio,	Nueva York	Socia,	Mayoritaria,
adjunto,	Washington,		Atlanta	San
Atlanta	DC			Francisco

Reconocimientos

El equipo de investigación comprende a Diana Nleya, Layail Mustafa, Noah Furlonge-Walker y Ranti Odujinrin. Jackie Wong, un supervisor de proyecto ubicado en Filadelfia, proporcionó apoyo adicional al equipo con la investigación.

Este reporte está basado en una investigación conducida en colaboración con Walmart, la Fundación Kellogg, PolicyLink, el departamento de *People & Organizational Performance Practice* de McKinsey y el departamento *McKinsey Institute for Black Economic Mobility*. Agradecemos a Donna Morris, Ben-Saba Hasan, Kathleen McLaughlin, Jay Porter, Lorraine Stomski, Amy Goldfinger, Russell Shaffer, Melissa Hill, Jami Lamontagne, Marty Autrey, Heather Haberer, Amrit Sagar Mohapatra y Cher Evans de Walmart; a Jonathan Njus, Erin Currier, Debbie Green y Rebecca Noricks de la Fundación Kellogg; a Jocelyn Corbett, Josh Kirschenbaum y Mahlet Getachew de PolicyLink; y a Shelley Stewart, Ammanuel Zegeye, Duwain Pinder y JP Julien, los líderes y equipo central de McKinsey Institute for Black Economic Mobility.

La investigación analizaba datos generales de empleo de 53 compañías, incluyendo la información general de empleo y representación proporcionada por estas compañías. Agradecemos a los 15,000 empleados de estas compañías que participaron en las encuestas de experiencia y grupos de enfoque. Las compañías participantes representan muchas industrias e incluye Bayer, BestBuy, Bloomin' Brands, BNY Mellon, Chevron, DaVita, Dell Technologies, Eaton, Google, Corporación Hess, Hilton, Impossible Foods, Marshfield Clinic Health System, McKinsey & Company, MetLife, Mondelez International, Neuberger Berman, NextRoll, The Procter & Gamble Company, Protolabs, Rich Products, Salesforce, Schneider Electric, Securian Financial, Swiss RE, Walmart, y WEC Energy Group.

Muchos colegas en McKinsey proporcionaron apoyo y asesoría especializada. Entre los que compartieron su punto de vista y proporcionaron apoyo sobre experiencias en el lugar de trabajo e investigación laboral son Alexis Krivkovich, Ashley Thomas, Carolina Bonilla, Carolyn Pierce, Danny Hurvitz, Davis Carlin, Denvol Haye Jr., Diana Ellsworth, Drew Goldstein, Erin Friedlander Blank, Jane Qu, Jose Maria Quiros, Kanmani Chockalingam, Kweilin Ellingrud, Laura Pineault, Lucy Pérez, Mallory Smith, Margaret Swink, Margret-Ann Natsis, Manveer Grewal, Michael Chui, Natasha Korgaonkar, Randy Lim, Ricardo Huapaya y Sara Prince. También a Chris Higgins, Henry Bristol y Nikhil Patel y su

investigación con la Rework America Alliance y la Fundación Markle. Además, nos gustaría agradecer al equipo de *McKinsey Publishing* y el equipo de relaciones externas de McKinsey.

Estamos agradecidos con los asesores académicos que dieron su aporte a nuestro trabajo, incluyendo a Dr. Jo-Ann Rolle, decano de Negocios del Colegio Medgar Evers; Dr. Betsey Stevenson, profesor de Economía y Política Pública de la Universidad de Michigan Gerlad R. Ford, Escuela de Política Pública; y el Dr. Peter Q. Blair, profesor asistente, graduado de la Escuela de Educación, de la Universidad de Harvard.

El creciente número de investigaciones de la fuerza laboral e inequidad en Estados Unidos han contribuido al desarrollo de este reporte. Hemos citado muchos de estos trabajos a lo largo de este reporte, pero nos disculpamos por cualquier investigación importante que haya pasado desapercibida.

Introducción: la trampa de la primera línea

La gran mayoría de los estadounidenses son introducidos a la fuerza laboral por medio de los trabajos de primera línea, ya sea camareros, abasteciendo estanterías o doblando ropa. Hoy, aproximadamente un 70 por ciento de la fuerza laboral de Estados Unidos está concentrada en los puestos de primera línea²; sin embargo, hay una brecha de ambición: 70 por ciento de los trabajadores quieren avanzar, pero solo 1 de cada 4 podrá.

² Análisis de McKinsey basado en la Oficina de Estadísticas Laborales, información del 2019.

Un error frecuente es que los trabajadores pueden moverse de un nivel inicial de primera línea a la cima de la escalera corporativa. Para asegurarse, los casos si existen: El director ejecutivo de comida rápida que inició en la freidora, el repartidor de paquetes que ascendió a la alta gerencia, o el ejecutivo que empezó en la sala de correo, pero estos ejemplos no son representativos de la experiencia de la primera línea de trabajo.

A menudo, los puestos de primera línea son ambos un punto de inicio y finalización para los trabajadores. La mayoría de los empleados de la primera línea nunca suben la escalera corporativa: solo un 4 por ciento son promovidos a un trabajo de nivel inicial corporativo³. En su lugar, ellos rotan en una serie de posiciones que representan movimientos laterales, nunca ganando las habilidades necesarias o teniendo las oportunidades de avanzar. Los trabajadores de color son especialmente propensos a mantenerse en los puestos de primera línea.

³ McKinsey, análisis de la Red de Talentos de *Raza en el espacio laboral 2022*, 51 compañías participantes, 4 millones de empleados.

Hasta la fecha, los puestos de primera línea han sido altamente desconectados de los programas tradicionales corporativos. Las compañías han enfocado las iniciativas laborales, tales como capacitación y programas de DEI, en los empleados de nivel corporativo. Las compañías tienen una oportunidad de extender estos programas a la primera línea para restaurar su confianza, puentear la brecha de experiencia y crear una sociedad más equitativa.

Este reporte busca esclarecer a los trabajadores del personal de primera línea, la problemática que enfrentan, los caminos para avanzar en su carrera y las acciones que tanto trabajadores como compañías pueden tomar para abrir estos caminos a una mayor cantidad de empleados (ver la sección “Sobre esta investigación”). Mejoras en las promociones laborales pueden tener un enorme impacto para millones de trabajadores, en sus ingresos a lo largo de la vida, ascensos y experiencia laboral

Sobre esta investigación

Este informe se basa en investigaciones y análisis que abarcan gran cantidad de diferentes conjuntos de datos.

La Encuesta de Experiencia de Empleado y la Red de Talentos de *Raza en el espacio laboral* 2022, los cuales incluyen la Evaluación de Inclusión de McKinsey, proporcionó los datos sobre las experiencias y percepciones de los empleados a lo largo de múltiples áreas (tales como **patrocinio**, mentoría, retroalimentación, avances profesionales y grupos de recursos de empleados), definidas por factores demográficos (tales como edad, raza, género, orientación sexual). El conjunto completo de datos para el análisis de la Red de Talentos incluye los aportes de 51 compañías y cubre un estimado de 4 millones de empleados de la primera línea hasta nivel ejecutivo. Estos hallazgos se amplificaron con los datos de la Oficina de Estadísticas Laborales de los Estados Unidos, La Encuesta sobre la Comunidad Estadounidense, y más de 50 testimonios de empleados de primera línea provenientes de una variedad de razas.

Para comprender la progresión profesional, nos basamos en un estudio de McKinsey, el cual analizaba las historias laborales de 29 millones de personas y más de 800 profesiones.

Para más información sobre nuestra investigación en la progresión profesional, ver “Desbloqueando progresiones laborales basadas en experiencia para millones de trabajadores” McKinsey, 2 de junio del 2021.

Parte 1: la experiencia de la primera línea de trabajo para los trabajadores de color

La primera línea es una parte vital de casi todos los sectores de la economía. Estos trabajadores sirven como la cara pública de muchas organizaciones y hacen una enorme contribución a la economía de los Estados Unidos. Los trabajadores de la primera línea en industrias desde atención médica a transporte y logística hasta servicios alimenticios llevaron a la nación a través de la pandemia en los Estados Unidos; aun así, también experimentaron la mayor dificultad de la crisis económica.

A pesar de su importancia, estos empleados son devaluados frecuentemente por los negocios y la sociedad. Muchas compañías no extienden sus programas de fomento del desarrollo profesional y promociones laborales a la primera línea. No es de extrañar que los empleados de la primera línea reportaran no sentirse conectados con su organización, tampoco apoyados por sus gerentes y ni positivos sobre sus perspectivas profesionales.

Trabajadores de color, quienes son sobre representados en el personal de primera línea de los Estados Unidos, sienten con más profundidad estas dificultades que sus contrapartes caucásicas. En muchas compañías, los roles de primera línea son un círculo vicioso con salarios bajos y escasas promociones, dejando a los trabajadores de color sin un camino para escalar a la cima. Como resultado, más empleados de color están en puestos con baja calidad laboral (por ejemplo: trabajos sin beneficios sanitarios o no pagan el salario digno⁴). Tienen menos confianza en que su organización será justa y transparente, son menos propensos a recibir patrocinio para ser guiados en su carrera, y tienen menos acceso a oportunidades de promoción. La prevalencia de prejuicios en el ambiente laboral deja a los trabajadores de color sintiéndose frecuentemente apartados y en desventaja.

⁴ Marcela Escobar, “6 métricas de calidad que toda compañía debería saber.” Institución Brookings, 27 de octubre del 2021.

Las promociones y la movilidad económica son posibles, pero solo para un segmento: solo un 30 por ciento de los trabajadores se moverán a recibir una quinta parte de ingresos superior a lo largo de sus carreras⁵. Teniendo en cuenta que las personas de color comprenden la mayoría de los trabajadores de la primera línea, eso deja la clase media⁶ fuera de su alcance.

⁵ “Capital humano en el trabajo: El valor de la experiencia,” *McKinsey Global Institute*, 2 de junio del 2022. Ingresos de por vida son la suma de los salarios nominales sobre la vida laboral de 30 años de un individuo.

⁶ Pew Research Center define la clase media como los hogares que ganan “de 2 tercios a el doble de los ingresos medios de un estadounidense.” Eso agregado a un rango de ingresos de 30000 dólares a 90000 dólares por estadounidense soltero en dólares en el 2020.

Para más, ver “¿Eres parte de la clase media in los Estados Unidos? Descúbrelo con nuestra calculadora de ingresos”, creado por Jesse Bennett, Richard Fry y Rakesh Kochhar, Pew Research Center, 23 de julio del 2020.

Entender en profundidad al personal de primera línea y su experiencia es un paso crítico hacia la mejoría de resultados para los trabajadores.

Conoce a tu primera línea laboral

Con 112 millones de trabajadores, el personal de la primera línea es inmenso, pero no es monolítico. Los profesionales de la primera línea (por ejemplo: maestros de escuela y enfermeras registradas) suman 17 millones de trabajadores, los cuales ganan un salario anual promedio de 54000 dólares⁷. Los roles de primera línea de pago por horas y asalariados (tales como vendedores minoristas, cocineros y gerentes de tiendas) son ocupados por 95 millones de trabajadores quienes ganan un ingreso anual promedio de 33000 dólares. (Para más detalle, ver la sección “Definiendo la primera línea”) Este informe está enfocando primeramente en los trabajadores de primera línea con menor pago por hora y asalariados, más que en profesionales de la primera línea.

⁷ Análisis de McKinsey basado en la Oficina de Estadísticas Laborales, 2019

Un vistazo más cercano a las demografías⁸ del personal de primera línea de pago por hora y asalariados, demuestra el potencial desaprovechado de su mano de obra:

- Un 29 por ciento de los trabajadores de la primera línea se concentran en 10 ocupaciones.
- Un 78 por ciento no poseen una carrera universitaria de 4 años.
- Solo un 20 por ciento de los trabajadores de la primera línea son menores de 25 años.
- Un 42 por ciento del personal de primera línea, son trabajadores de color.
- Mas del 70 por ciento de los trabajadores negros y latinos están en puestos de primera línea (Gráfica 1).

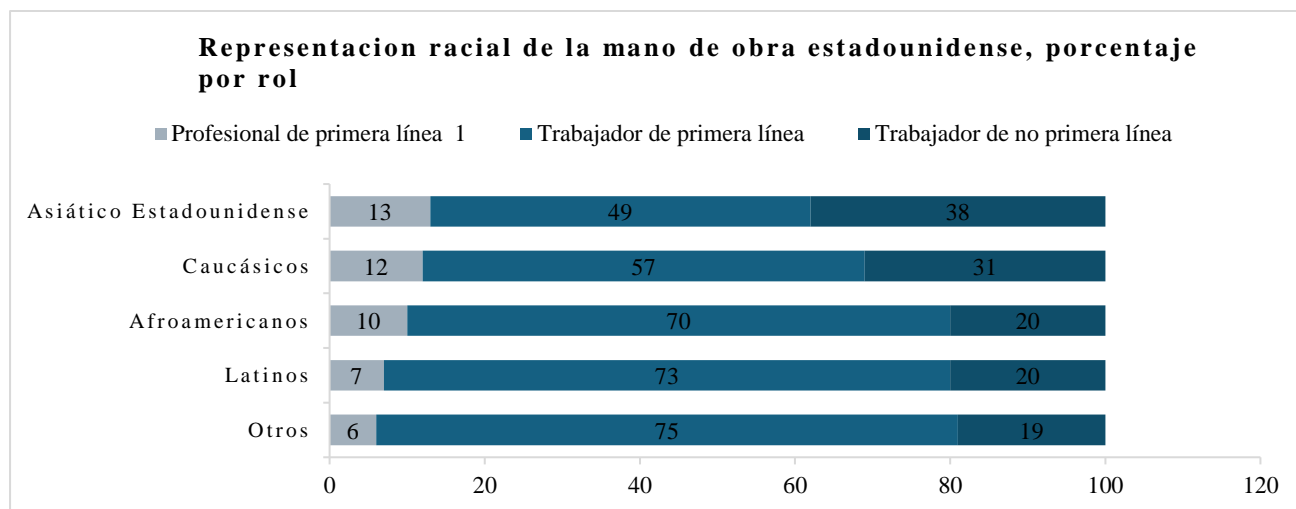
⁸ Encuesta de la Comunidad Estadounidense, Oficina del Censo de los Estados Unidos, accesado el 27 de julio del 2022; Análisis de Moody de “Empleo ocupacional y estadística salarial,” Oficina de Estadísticas Laborales, accesado el 27 de julio del 2022; “Censo cuatrimestral de empleo y salario,” Oficina de Estadísticas Laborales, accesado el 27 de julio del 2022.

Los empleados de la primera línea poseen inestabilidad económica de forma frecuente, definido por PolicyLink como un 200 por ciento de la línea federal de pobreza⁹. Esto equivale a un ingreso anual de 27180 dólares para un soltero y de 46060 dólares para un hogar de 3 personas. Uno de cada dos trabajadores de primera línea ganan menos de 30000 dólares al año, y solo un 15 por ciento gana más de 50000 dólares.

⁹Ascendiendo a empleados de color de la primera línea: Innovando para la ventaja competitiva del personal de primera línea de los Estados Unidos, FSG y PolicyLink, enero del 2020; “Directrices de pobreza del Departamento de Salud y Servicios Humanos (HHS) para el 2022,” Oficina del Subsecretario de Planificación y Evaluación (ASPE), Departamento de Salud y Servicios Humanos de los Estados Unidos, 12 de enero del 2022.

Gráfica 1

Más del 70 por ciento de los trabajadores afroamericanos y latinos de Estados Unidos se mantienen en puesto de primera línea.



¹ Trabajadores de primera línea con títulos avanzados (ej.: doctores).

Fuente: Análisis de Moody; Encuesta de la Comunidad Estadounidense de la Oficina del Censo de los Estados Unidos; Oficina de Estadísticas Laborales de los Estados Unidos

Definiendo la primera línea

La primera línea abarca múltiples roles con variedad de niveles de ingresos y rutas de ascenso. Para este informe, definimos trabajadores de primera línea como aquellos que trabajan directamente con clientes o están envueltos de forma directa en la fabricación o venta de un producto o proporcionando un servicio (tales como cajeros, vendedores y personal de limpieza). Estos puestos no requieren de habilidades técnicas avanzadas o credenciales. Sin embargo, en algunas circunstancias los profesionales con títulos avanzados (como médicos, enfermeros y maestros) son considerados empleados de primera línea, estamos excluyéndolos de este informe porque sus experiencias difieren considerablemente de las de los trabajadores de primera línea pagados por hora y asalariados.

La primera línea no profesional puede ser dividida entre roles pagados por hora (por ejemplo: vendedores minoristas, cocineros y conductores) y puestos asalariados (por ejemplo: gerentes de planta).

Los empleados de primera línea no han sido beneficiados por las inversiones del DEI de los Estados Unidos corporativo

Así como ha sido detallado en pasados informes de McKinsey, empleados de todos los niveles enfrentan desafíos en el trabajo, y esto es particularmente verdadero para las personas de color¹⁰. Sin embargo, nuestra investigación halló que los trabajadores de primera línea reportan la peor experiencia. Los empleados de primera línea pagados por hora son cerca de un 20 por ciento menos propensos que los empleados corporativos a creer en la efectividad de las políticas de DEI (Gráfica 2). Solo un tercio de los trabajadores del 10 por ciento del límite inferior en ingresos, poseen empleos con licencia remunerada por enfermedad¹¹. Además, un 45 por ciento de los empleados pagados por hora no creen que su compañía los aliente a aprovechar los beneficios de las políticas de conciliación de vida laboral y familiar (por ejemplo: permisos para ausentarse o licencia de maternidad o paternidad) sin arriesgar su empleo o su desarrollo profesional.

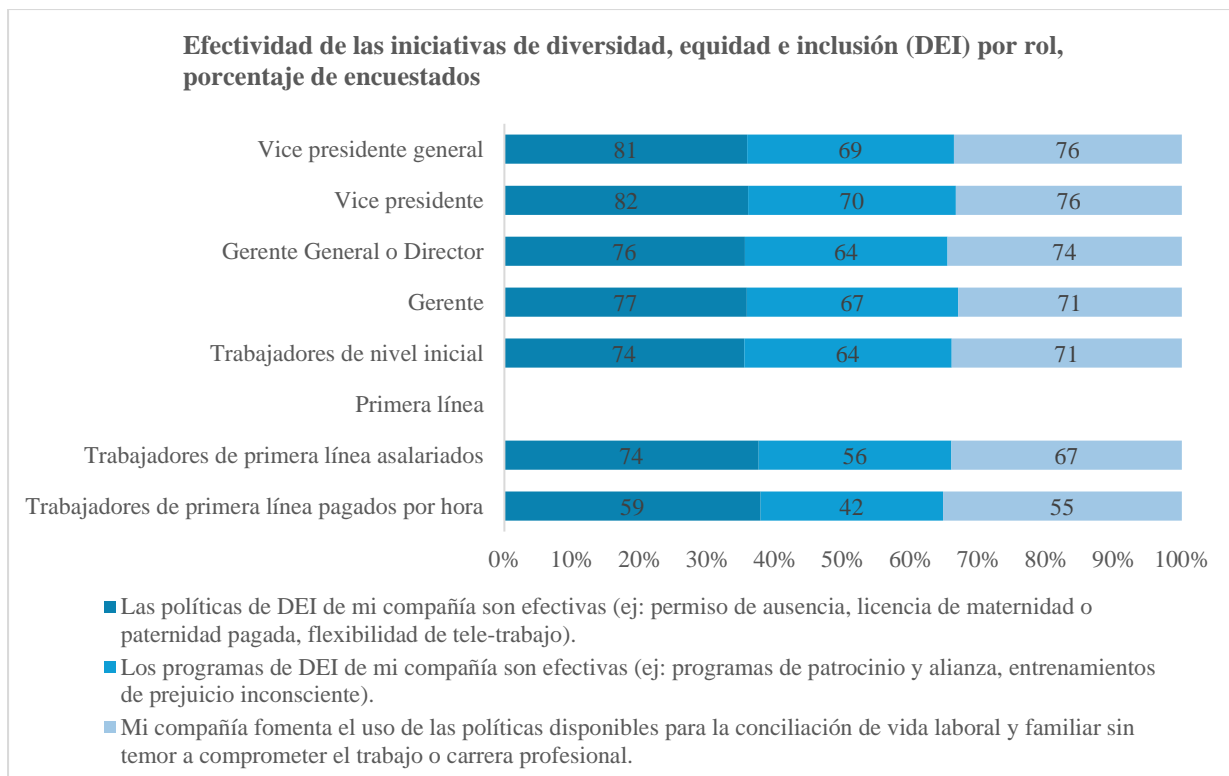
¹⁰“Raza en el espacio laboral,” 21 de febrero del 2021.

¹¹“Prestaciones laborales en los Estados Unidos” Oficina de Estadísticas Laborales, marzo del 2019.

En otras palabras, los empleados que se podrían beneficiar más de las políticas y programas de DEI tienen poca confianza en las habilidades de su organización en presentarlas. En nuestra encuesta, los empleados de color asocian las acciones DEI de sus compañías con palabras como “inadecuadas”, “equivocadas” y “mínimas”. Y ya que la mayoría de los trabajadores de color están ubicados en los puestos de primera línea, esta desconexión representa una gran oportunidad desaprovechada por parte de los corporativos estadounidenses hacia su fuerza laboral al completo.

Gráfica 2

En las compañías estadounidenses, los programas de diversidad, equidad e inclusión (DEI) no están llegando al personal de primera línea pagado por hora, en comparación con otros grupos.



Entrevistados = 15040.

Fuente: Encuesta McKinsey *Raza en el espacio laboral*, 2022.

Trabajadores de primera línea pagados por hora reportan una falta general de equidad en los ascensos

El compromiso de una organización en tener revisiones de desempeño y ascensos transparentes es crítico para instaurar un sentido de equidad entre la fuerza laboral¹². Nuestra investigación exploró las percepciones de los empleados de la primera línea pagados por hora con respecto a la equidad y transparencia en los ascensos. Ellos son más propensos que sus compañeros asalariados, a sentir que la organización es inconsistente cuando se trata de ascender empleados basados en mérito y desempeño (Gráfica 3). Solo un 39 por ciento de los entrevistados pagados por hora, creen que sus empleadores tienen una visión imparcial y empírica del desempeño y ascenso. Esta falta de equidad destaca que las inversiones en los trabajadores de primera línea han sido inefectivos e insuficientes a la fecha.

¹² Bryan Hancock, Elizabeth Hioe y Bill Schaninger, "El factor equidad en el manejo de desempeño," Informe Trimestral de McKinsey, 5 de abril del 2018.

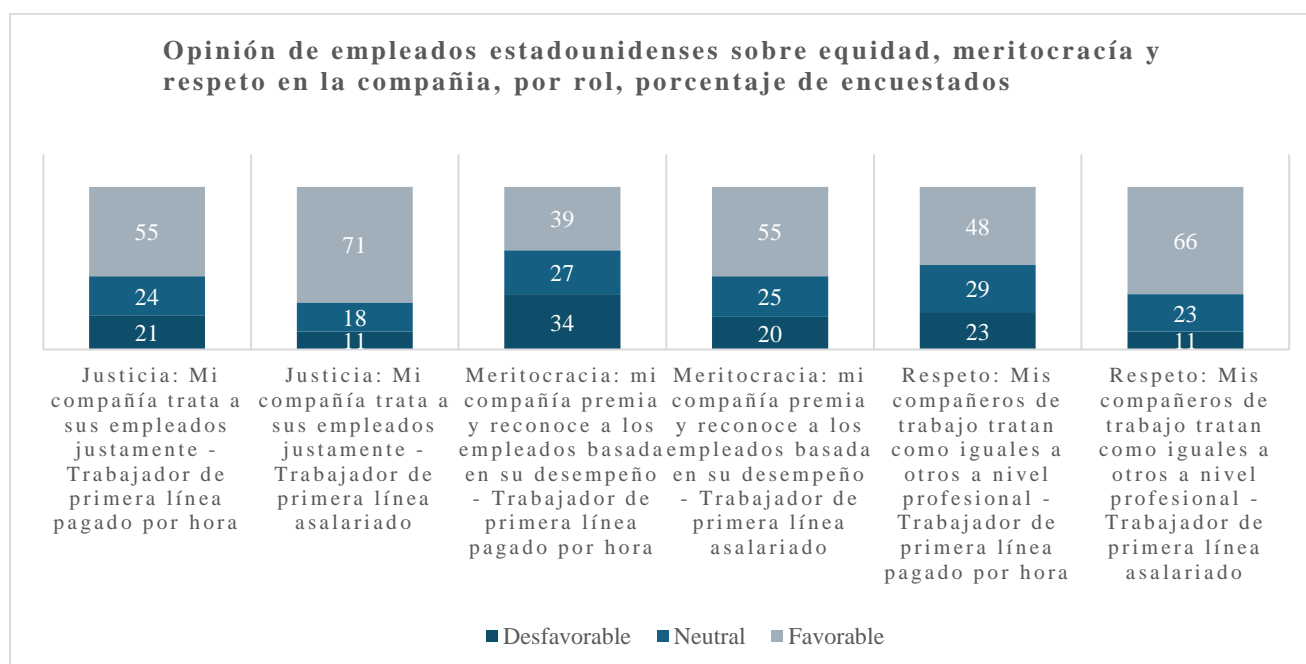
Nuestro análisis sugiere que las compañías solo ascienden un 4 por ciento del personal de primera línea a puestos corporativos. Un par de factores contribuyen a este patrón; primero,

las compañías no crean estas trayectorias normalmente, buscando en su lugar por distintos grupos de candidatos para llenar los puestos corporativos. Segundo, muchas compañías no tienen capacitaciones y programas de desarrollo o procesos de personal para sus trabajadores de primera línea, por lo que los empleados con gran potencial no se encuentran en el radar para ser ayudados a desarrollar sus habilidades que les ayudarían a calificar para un puesto corporativo de nivel inicial.

Las percepciones de un trabajador sobre la inclusión empresarial, al grado en que el sistema de una organización fomenta un ambiente acogedor y justo para que todos los trabajadores sean ellos mismo, puede afectar el grado al cual se sienten valorados y empoderados a perseguir oportunidades de ascenso. Los empleados pagados por hora también perciben menor disposición de los líderes y compañeros de trabajo a tratar a otros con respeto mutuo e inclusión de sus opiniones.

Gráfica 3

Empleados estadounidenses de primera línea pagados por hora reportan inconsistencia en el reconocimiento y ascensos basados en mérito y desempeño.



Número de trabajadores de primera línea pagados por hora = 10380. Número de trabajadores asalariados = 7019.

Fuente: Encuesta de Inclusión de McKinsey, 2020-2022. Análisis de McKinsey (ve apéndice técnico para más información sobre la encuesta y el análisis metodológico)

“Cuando me contrataron por primera vez, ellos decían que había oportunidades para ascender, pero no ha habido mucho apoyo. Ellos como que escogen a quién quieren que sea el próximo gerente, quién quieren que sea promovido, dependiendo de cómo se sienten sobre ti. Supongo que tiene un poco que ver con el desempeño, pero mayormente, parece estar relacionado con favoritismo.” Hombre afroamericano de 23 años, guía turístico.

“Escuché un poco de la charla que debía escuchar, pero simplemente no veo las acciones necesarias para ayudar. Nos sentamos y hacemos reuniones 1 a 1 y retroalimentación anual, y hablamos sobre las revisiones de desempeño y tú escuchas ‘Esto es lo que vamos a necesitar, y esto es como vamos a llegar al siguiente nivel’ pero simplemente no está pasando. Siento que contribuyo con mi parte, pero simplemente no veo el reflejo de ello... donde ellos contribuirían.” Mujer afroamericana de 50 años, supervisora de servicio al cliente.

Trabajadores de color de la primera línea desean avanzar, pero falta el acceso a oportunidades

Nuestro análisis también reveló una brecha medible entre el deseo de los empleados de color por avanzar y la disponibilidad de oportunidades para hacerlo (Gráfica 4). El personal caucásico de primera línea era más propenso a reportar haber recibido oportunidades de ascenso a pesar de exponer el menor deseo de avanzar. En contraste, los empleados latinos experimentan 30 puntos porcentuales entre el deseo de ser promovido y la oportunidad de avanzar, 6 veces mayor que los empleados caucásicos. Los empleados asiáticos y afroamericanos de la primera línea reportaron brechas ligeramente menores en comparación con sus contrapartes latinas.

Esta falta de oportunidades de ascenso pesa sumamente en trabajadores de color.

Investigaciones previas de McKinsey han encontrado que el limitado desarrollo profesional y de promoción es la mayor razón de que trabajadores afroamericanos y asiáticos de la primera línea planean dejar sus compañías¹³.

¹³ Gran deserción de McKinsey, Encuesta *Gran Desgaste Global 2.0*, 2022.

Gráfica 4

Trabajadores de color de primera línea reciben menos oportunidades a pesar de su alto interés en ascender.



¹ Preguntas: ¿Tiene usted el deseo de ser promovido a un nivel más alto en su compañía? En años anteriores ¿He sido usted contactado por alguien de mayor antigüedad para alguno de los siguientes aspectos: asignaciones o proyectos nuevos o desafiantes, programas de desarrollo de habilidades, ascensos, otros, capacitación de gerencia? Número de encuestados = 4796.

Fuente: Encuesta de McKinsey *Raza en el espacio laboral*, 2022

“He estado ahí ya cerca de 2 años y nunca he sido realmente contactada sobre ascender, cuando otros compañeros, específicamente mis compañeros masculinos los cuales no son de la misma etnia, han sido contactados para ascender en su posición. Ellos han estado cerca del mismo tiempo que yo he estado, y ellos han tenido los mismos puestos que yo he tenido; pero ellos tienden a recibir más apoyo de los superiores, especialmente de superiores masculinos... Todo tiene que venir de ti misma. Es mucho trabajo solitario. Tu debes empujarte a ti misma hacia arriba... En mi profesión, siento que otros no tienen que hacer tanto.” Mujer latina de 27 años, asociada de ventas.

Trabajadores Asiáticos: una historia de experiencias divergentes

Datos rápidos¹

Un 5 por ciento de las industrias líderes de los trabajadores de primera línea: servicios de alojamiento y alimentación, manufactura y atención médica.

¹ Oficina de Estadísticas Laborales (Encuesta de empleo cuatrimestral y Censo cuatrimestral de empleo e ingresos); Análisis de Moody; Encuesta de la Comunidad Estadounidense, 2019.

A primera vista, los trabajadores de primera línea asiáticos parecen estar rápidamente preparados para ascender. Ellos tienen los mayores niveles de educación: un 21 por ciento a obtenido al menos un título de bachiller, comparado a un 16 por ciento de trabajadores

caucásicos, un 10 por ciento de trabajadores afroamericanos y un 8 por ciento de trabajadores latinos. Ellos también reportan los mayores niveles de inclusión comparado con otros compañeros de color y son más propensos a creer que su lugar de trabajo es justo e imparcial.

Aún a pesar de estas ventajas, los asiáticos deben sobrepasar muchos de los mismos desafíos que otros compañeros de color: ganan consistentemente menos dinero que sus compañeros caucásicos por el mismo trabajo. No se sienten apoyados, ya que más de la mitad carecen de patrocinadores, y reportan los niveles más altos de agotamiento entre todos los trabajadores de primera línea.

Además, los empleados asiáticos son comúnmente estereotipados como diligentes y callados, percepciones que pueden ser un factor que les previene de moverse a posiciones de gerencia². Ellos experimentan un descenso constante en su representación por nivel, decayendo de un 9 por ciento de puestos de primera línea pagados por hora, a un 5 por ciento de puestos asalariados.

² Addel Hassan, "Confrontando los estereotipos de Asiático Estadounidenses", New York Times, 23 de junio del 2018.

El panorama se complica aún más con el hecho que los trabajadores asiáticos representan una amplia gama de nacionalidades y subgrupos, cada uno con sus distintas experiencias. Por ejemplo, los asiáticos del sudeste reportan algunas de las menores puntuaciones en inclusión, mientras los asiáticos del este y sur reportan las más altas.

Las compañías que buscan diseñar programas efectivos y brindar soporte para los trabajadores asiáticos deben buscar bajo la clasificación de mayor línea para entender realmente los desafíos específicos que enfrenta cada subgrupo.

Frenados por la falta de habilidades interpersonales

"Con mi compañía actual, he estado en ventas por 6 años y en 3 distintas funciones dentro de ventas. Quería moverme a un rol de gerente de ventas, que era lo que inicialmente me estaba desarrollando para, pero por alguna razón no pude recibir un trato apropiado, y pensé que me faltaban habilidades de liderazgo, ¿verdad? Porque eso es el tipo de cosas que te dicen, y algunas veces usan eso para bloquear un movimiento laboral cuando tienes las cualidades que están buscando.

Lo interesante es que muchas personas me ven y deciden que las mujeres asiáticas no son buenas en ventas. No importa cuantos años de experiencia exitosa tuviera con anterioridad, en mi compañía actual, todo lo que ven es, bueno, ella está en operaciones ahora, ella es muy 'blanco y negro' para entender ventas. Y pienso que simplemente es ser una mujer asiática: si no actúo como ellos esperan que lo haga, ser buena y dócil, te ponen en la lista negra.

Estoy intentando romper esa barrera para ayudar a otras personas como yo a poder superarlo. Y puedo decir que probablemente soy una de las pocas mujeres sudasiáticas en posiciones de liderazgo aquí.” Mujer asiática de 38 años, gerente de ventas.

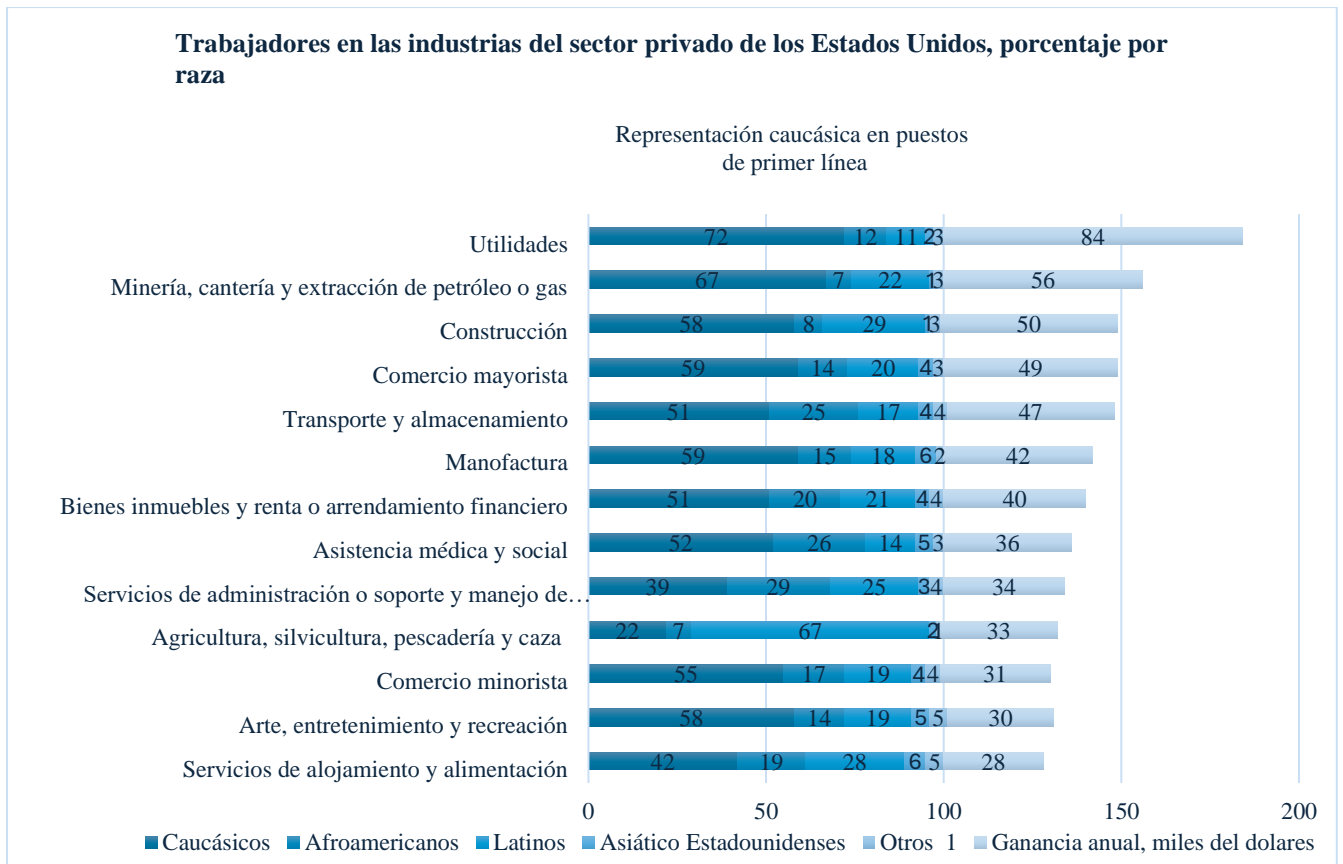
Los trabajadores de color están sobre representados en las industrias de primera línea con los menores pagos

El pago por trabajos de primera línea varía significativamente por industria. Nuestro análisis encontró que los trabajadores de color están significativamente más representados en industrias con el menor pago de los empleos de primera línea (Gráfica 5). Considera que los trabajadores de color representan el 58 por ciento de los servicios de alimentación y alojamiento, una industria con un salario anual de solo 28000 dólares. En contraste, representan solo el 28 por ciento de los puestos de primera línea en utilidades, el cual paga cerca de 84000 dólares al año. En promedio, el personal de primera línea afroamericano y latino ganan un 20 por ciento menos que los trabajadores caucásicos de primera línea.

Esta distribución tiene un impacto directo en los prospectos financieros de los trabajadores de color de primera línea, así como en oportunidades de avanzar en su carrera profesional y obtener nuevas habilidades.

Gráfica 5

Trabajadores de color están poco representado en las industrias mejor pagadas en términos de puestos de primera línea en los Estados Unidos.



Nota: Cifras pueden no sumar un 100 por ciento, debido al redondeo.

¹ Nativos Hawaianos e isleños del Pacífico; Indígenas (ej: aborígenes, primeros pobladores, nativos americanos) y personas que se identifican son dos o más razas.

Fuente: Encuesta de Estadísticas de Empleo y Salarios Ocupacionales de la Oficina de Estadísticas Laborales, de mayo del 2021; Encuesta EEQ-1 de la Comisión para la Igualdad de Oportunidades en el Empleo, 2018.

Trabajadores de color de primera línea ven la representación caer de los roles pagados por hora a los asalariados

En nuestras compañías participantes, los empleados de color eran sobre representados en los puestos de primera línea pagados por horas y eran 1.4 veces más propensos que los empleados caucásicos a moverse a puestos asalariados¹⁴. La trayectoria difiere por raza – los empleados asiáticos ven como su número disminuye progresivamente de pago por hora a gerente pagado por hora a puestos asalariados, mientras los empleados latinos experimentan un pequeño aumento a nivel de gerente pagado por hora antes de disminuir significativamente para el siguiente puesto (Gráfica 6). La representación de empleados de color en roles corporativos se nutre mayormente de otro grupo de candidatos¹⁵.

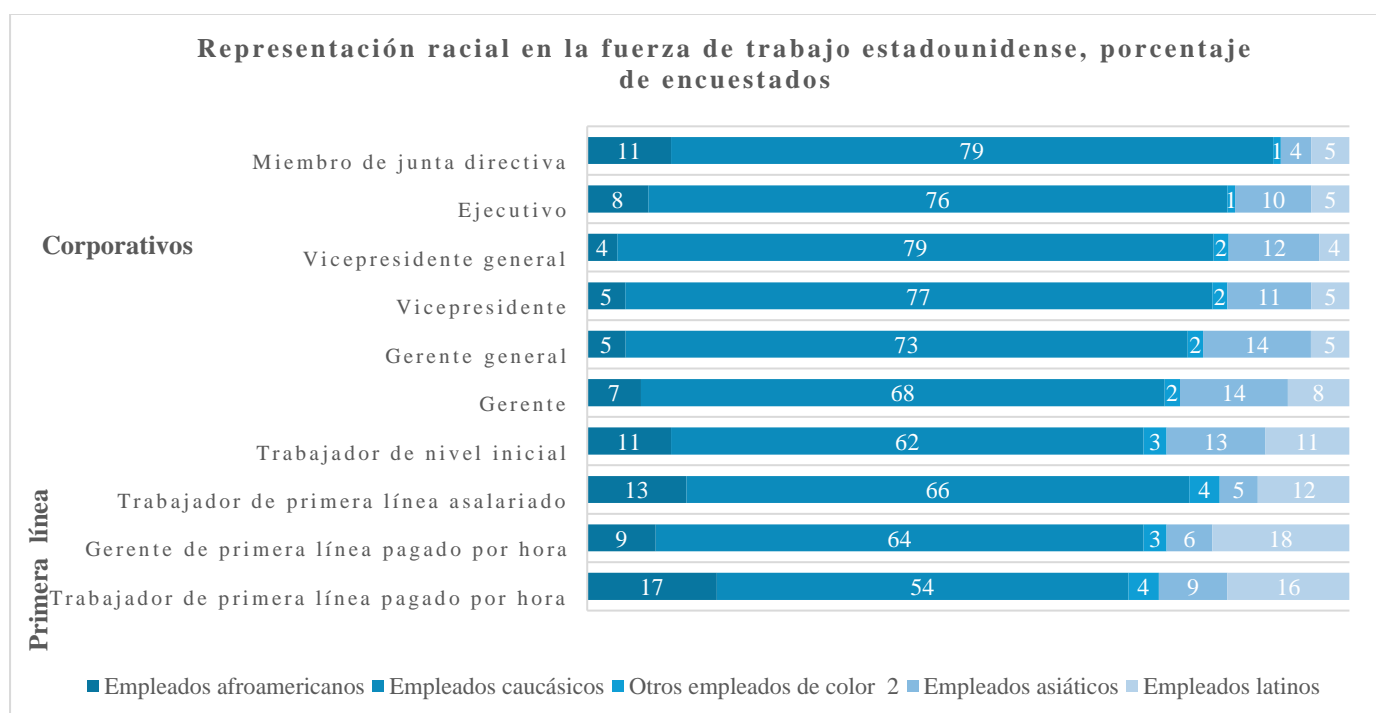
¹⁴ Todo nivel mayor a gerente pagado por hora, es un puesto asalariado.

¹⁵ Para más detalles sobre la representación corporativa, ver *Raza en el espacio laboral*, del 21 de febrero del 2021.

Generalmente, las personas de color ven como su número baja 10 puntos porcentuales de los roles de primera línea pagados por hora a puestos asalariados. Ya que los puestos de primera línea asalariados son más propensos a pagar un salario digno y tener mejores beneficios, son trabajos más sostenibles.

Gráfica 6

La diferencia de representación de los empleados de color en la primera línea en Estados Unidos es mayor al moverse de un puesto pagado por hora a gerente de primera línea y puestos asalariados de primera línea.



Nota: Cifras pueden no sumar un 100 por ciento, debido al redondeo: representación calculada como un promedio no ponderado de la representación por grupo demográfico de las compañías participantes.

¹ Tomado de junio 2021, suma de datos de 52 compañías y más de 4 millones de empleados. Promedio de las cuotas de 51 compañías (1 compañía = 1 punto); gerentes de primera línea, pagados por hora, formado por 15 empresas.

² Nativos Hawaianos e isleños del Pacífico; Indígenas (ej: aborígenes, primeros pobladores, nativos americanos) y personas que se identifican son dos o más razas.

Fuente: Encuesta de McKinsey *Raza en el espacio laboral*, 2022; Análisis de McKinsey (ver apéndice para más información sobre la metodología de análisis)

“He notado que no hay muchas minorías en cualquier puesto a excepción de los puestos de nivel inicial. Se que algunas minorías han intentado moverse a gerencia, se mantienen por un

corto tiempo y luego se van. No se como eso puede afectarme a futuro, pero sé que hay algunas barreras para entrar a gerencia y puestos mayores.” Hombre afroamericano de 23 años, guía turístico

Los empleados de color son frenados por el bajo nivel de patrocinio

El nivel de apoyo que los trabajadores reciben en su trabajo puede tener un impacto directo en sus perspectivas profesionales a futuro. Un mentor comparte su conocimiento, sabiduría, y consejos con colegas novatos. Un patrocinador toma un rol activo en la creación de oportunidades para empleados novatos. También pueden brindar visibilidad sobre proyectos, oportunidades laborales, y ascensos y crear un sentido de comunidad y pertenencia.

Nuestra investigación encontró que más de la mitad de todos los empleados de color de la primera línea tienen al menos un mentor en su lugar de trabajo – alineado con sus compañeros caucásicos. Pero estas relaciones no se trasladan en patrocinios. Los empleados afroamericanos y latinos de primera línea reportan los niveles más bajos de patrocinio: la mayoría (cerca de 6 de 10) no tienen patrocinadores del todo, con el personal afroamericano de primera línea mostrando niveles especialmente bajos (Gráfica 7).

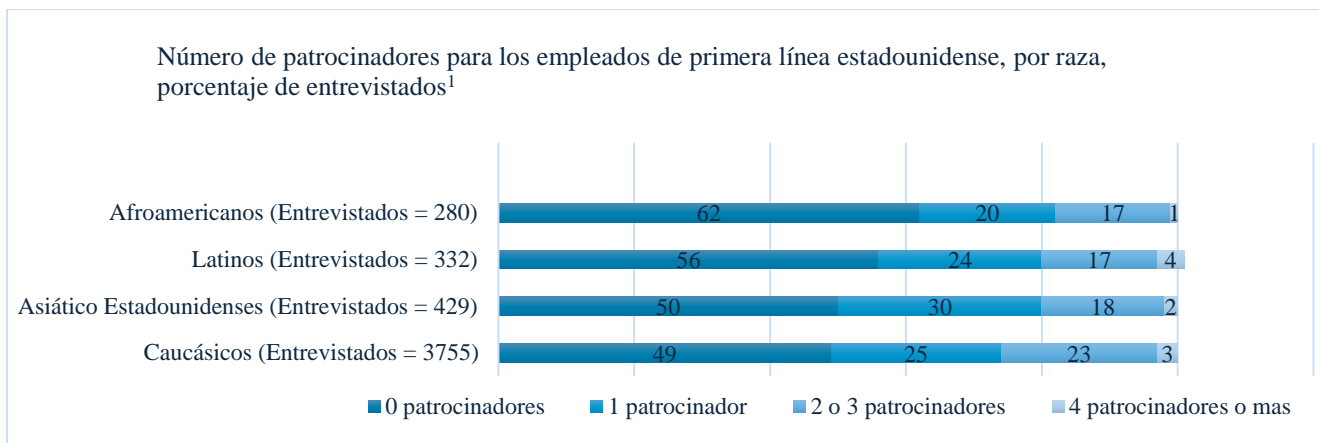
Este patrón tiende a tener un impacto directo en el desarrollo profesional. Nuestro análisis halló que los empleados son 5 veces más propensos a tener un ascenso si tienen 4 o más patrocinadores. En efecto, cada patrocinador se traduce en aproximadamente un 10 por ciento más de probabilidades de obtener una promoción para un empleado.

El patrocinio también es una contribución importante para la inclusión¹⁶ y es una forma integral para los trabajadores recibir orientación y dirección en el desarrollo de habilidades día con día. Al ayudar a los trabajadores a obtener experiencia en el campo, los patrocinadores contribuyen a la ganancia potencial del personal de primera línea con los menores niveles de educación, especialmente en categorías ocupacionales como agricultura y servicio alimentario.

¹⁶“Entendiendo las barreras organizacionales para un ambiente laboral mas inclusivo,” McKinsey, 23 de junio del 2020.

Gráfica 7

Puestos de primera línea en Estados Unidos, trabajadores afroamericanos y latinos son más propensos que los caucásicos y asiático-estadounidenses a tener patrocinadores.

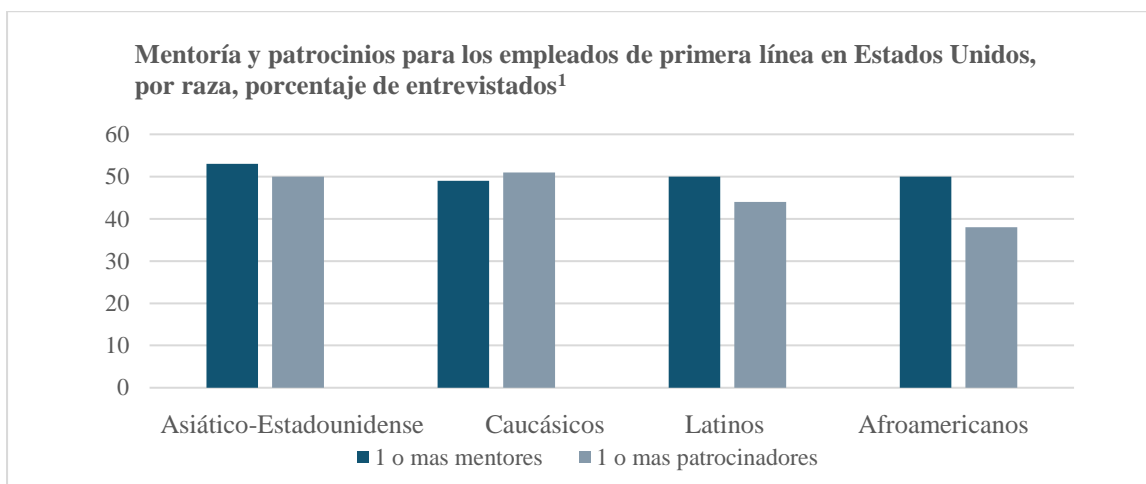


Nota: Cifras pueden no sumar un 100 por ciento, debido al redondeo.

¹ Preguntas: ¿Cuántos patrocinadores tiene actualmente? Entrevistados = 4796

Fuente: Encuesta de McKinsey *Raza en el espacio laboral, 2022*

Para los trabajadores afroamericanos y latinos de primera línea en Estados Unidos, la mentoría no se traduce a un patrocinio.



¹ Preguntas: ¿Cuántos mentores tiene actualmente? ¿Cuántos patrocinadores tiene actualmente? Entrevistados = 4796

Fuente: Encuesta de McKinsey *Raza en el espacio laboral, 2022*

Trabajadores latinos: la resiliencia es la cara de los desafíos

Datos rápidos¹

Un 14 por ciento de las industrias líderes del personal de primera línea: agricultura, construcción, silvicultura, pesca y caza.

Los trabajadores latinos, quienes son más propensos que cualquier otra raza a estar en puestos de primera línea, afrontan muchos desafíos abrumadores cuando se habla de sus carreras profesionales. Tienen el segundo salario más bajo de todos los grupos, ganando un 22 por ciento menos que los trabajadores caucásicos de primera línea, en parte debido a las ocupaciones en las cuales se encuentran. Son el grupo inmigrante más grande de todas las razas, con 85 por ciento de inmigrantes en la primera línea. También poseen los menores niveles de educación por raza: solo un 36 por ciento tienen alguna escolaridad posterior a secundaria.

¹ Encuesta de la Comunidad Estadounidense, Oficina de Censo de los Estados Unidos, tomado el 27 de julio del 2022.

Como quizá era de esperar, el personal latino de primera línea no se siente incluido o apoyado en el trabajo: son significativamente menos propensos que los trabajadores caucásicos a creer que su patrono permite la libre expresión y tiene mecanismos apropiados de protección en el lugar de trabajo. En mayor proporción que otros grupos, los empleados latinos de primera línea mencionan la falta de apoyo por el bienestar de sus empleados, siendo una razón primordial para dejar sus empleos. También reportan tener el segundo nivel más bajo de patrocinio, un elemento crucial en un ascenso.

A pesar de estos desafíos, los empleados latinos en nuestra muestra han logrado una mayor proporción de ascensos de puestos de primera línea a roles iniciales a nivel corporativo, comparado con otros empleados de color. También reportan niveles de inclusión alineados con sus compañeros caucásicos cuando son promovidos a puestos corporativos.

Reservas ante las promociones

“He estado con esta compañía por casi 2 años. De hecho, ingresé como un miembro de reserva al equipo, pero hice una transición al departamento de ventas hace unos meses. Me han planteado un par de veces ser supervisora después de mi primer año, y rechacé la posición unas cuantas veces antes de decidirme a tomarla. Pensé que necesitaría algún tipo de experiencia como líder y decidí decir que si finalmente.

Mi supervisor ha hablado conmigo de nuevo sobre moverme, cerca de un año antes, pero no me sentía apoyada en lo más mínimo en mi posición. ‘Si me siento como que no me dan apoyo ahora, y no tengo las herramientas correctas como supervisora, dudo que ellos vayan a darme las herramientas necesarias para un rol con más responsabilidades.’

La única forma en la que me veo a mí misma moviéndome sería por mucho sacrificio. Y tal vez ellos creen que, al ser una persona hispana, estaría dispuesta a hacerlo porque quiero ascender, pero para ser honesta, no vale mi salud mental.

La gerente de la tienda es hispana – ella es inmigrante. Y es genial, porque inició como cajera y ha labrado su camino. Ella es gerente de tienda ahora, después de 13 años en la compañía. Eso es fantástico, eso es grandioso, pero al mismo tiempo, veo mucho sacrificio, veo muchas lágrimas, puedo ver mucho dolor – y no quiero eso para mí misma.” Mujer latina de 23 años, cajera

“Mientras que inicialmente hay un gran apoyo y presión a las minorías por intentar una carrera diferente o un movimiento profesional, cuando de verdad se trata de oportunidades de liderazgo que están más allá de los procesos iniciales de contratación y mentoría... simplemente no es para las minorías étnicas.” Hombre latino de 40 años, cajero bancario

“¿Que tan apoyado me siento en mi ámbito laboral? No mucho. Me siento como si estuviera solo en una isla... Realmente no tengo muchos líderes a mi alrededor para seguir su ejemplo.” Hombre afroamericano de 43 años, empleado de ventas al cliente

Los trabajadores de color de la primera línea no se sienten incluidos en su lugar de trabajo

La inclusión consiste en comportamientos tales como alianzas, respeto mutuo, y la apología, así como condiciones como prosperidad compartida y participación justa. Investigaciones previas de McKinsey han resaltado el rol de la inclusión en el incremento del apoyo a los colegas, retención de empleados y percepción favorable de la organización, entre otros beneficios¹⁷.

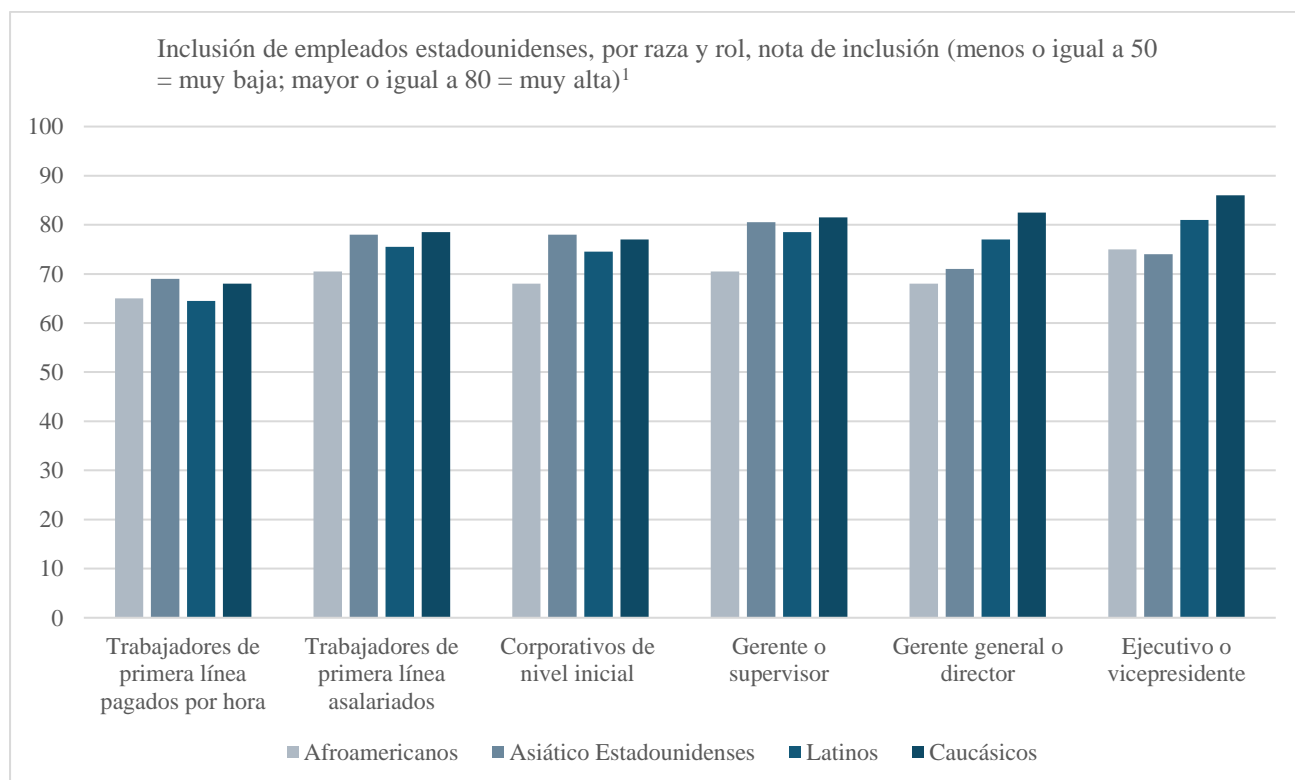
¹⁷ “Raza en el espacio laboral” 21 de febrero del 2021

Los empleados de primera línea pagados por hora reportan el menor sentimiento de inclusión general de todos los empleados del personal y las diferencias en la inclusión surgen conforme suben la escalera corporativa (Gráfica 8). Mientras que todos los grupos se sienten más conectados en niveles más altos de organización, los empleados afroamericanos

experimentan menor inclusión que sus compañeros en la mayoría de los niveles. Este patrón configura esencialmente una situación sin beneficios para los empleados afroamericanos de primera línea: factores estresantes compartidos en la primera línea o sentimientos de aislamiento conforme escalan profesionalmente.

Gráfica 8

Las diferencias en inclusión generalmente se sienten con más intensidad conforme los empleados estadounidenses suben la escalera corporativa, especialmente para empleados afroamericanos.



¹ Número de entrevistados = 39893. Excluye respuestas en las que se seleccionó "Otros" como grupo racial.

Fuente: Encuesta de Inclusión de McKinsey, 2020-2022. Análisis de McKinsey (ver apéndice técnico para más información sobre la encuesta y el análisis metodológico)

La experiencia de la primera línea afroamericana: superando el déficit de confianza

Datos rápidos

Un 13 por ciento de las industrias líderes de los trabajadores de primera línea: soporte médico, servicios de protección y servicios a la comunidad y sociedad.

Nuestra encuesta *Raza en el espacio laboral* encontró que entre el todo el personal de primera línea, los trabajadores afroamericanos tienen el déficit más alto de confianza en la empresa, definido como una brecha en percepción de atributos tales como aceptación, equidad y autenticidad.

Este déficit de confianza afecta cerca de todos los aspectos de la experiencia de los afroamericanos en la primera línea. Por ejemplo, los trabajadores afroamericanos reportan la satisfacción laboral más alta y la menor intención de dejar la compañía. Aun así, también experimentan los mayores niveles de desgaste. ¿Qué está causando que busquen oportunidades en otras organizaciones? Para muchos, es la falta de desarrollo y potencial profesional. Todo el 84 por ciento de los empleados afroamericanos indicaron un deseo de ser promovidos, pero solo un 62 por ciento perciben una oportunidad de promoción.

Ellos tampoco ven su ambiente laboral como una meritocracia (Gráfica 9). Un factor contribuyente es que los trabajadores afroamericanos de primera línea ganan en promedio un 25 por ciento menos que sus compañeros caucásicos.

La falta de confianza también se manifiesta en numerosas formas. Los empleados afroamericanos son los que se sienten menos apoyados, alentados y tratados con igualdad profesional por sus compañeros. Un 51 por ciento de los empleados afroamericanos tienen al menos un mentor, pero solo el 38 por ciento dicen tener al menos un patrocinador, lo que significa que muchos trabajadores afroamericanos carecen de una valiosa dirección y apoyo en sus carreras profesionales y oportunidades de desarrollo. Además, los empleados afroamericanos de primera línea reportan sentirse menos incluidos en su espacio laboral, comparado con otros grupos raciales.

Por muy carente que sea la experiencia de los empleados afroamericanos de primera línea, también representa el punto máximo. Ya que, al subir la escalera corporativa, reportan sentirse aún menos incluido y apoyados que sus compañeros.

Luchando contra las percepciones arraigadas

“Siento que mi raza afecta mi trayectoria en la mi compañía. Mientras que en ocasiones hay oportunidades de ascenso, muchas veces soy pasada por alto. Mis compañeros dudan de mí, incluso cuando compartimos los mismos requisitos que los demás. Mis habilidades son juzgadas, mi opinión personal es cuestionada en muchas ocasiones, y eso refleja como los

pacientes me perciben como una profesional de la salud que los atiende. Lo vuelve muy complicado.

Siento que las personas de otras razas no tienen que lidiar con esto en la compañía. En el mismo sentido, me hace trabajar y hace que mi trabajo sea 10 veces más difícil. Tomo lo que hago de forma muy seria y esto es algo que muchos trabajadores afroamericanos tienen que lidiar con, en su lugar de trabajo, pero aún tienes un servicio que brindar.

Yo me relaciono bien con mis pacientes y sus familias, y me comunico bien con los doctores. Pero aún no me han ofrecido ascensos, incluso cuando he preguntado por oportunidades. No conozco los detalles finales o porque no ha sucedido, solo sé que vengo y hago mi trabajo con lo mejor de mis capacidades sin importar todo lo que está pasando a mi alrededor.”

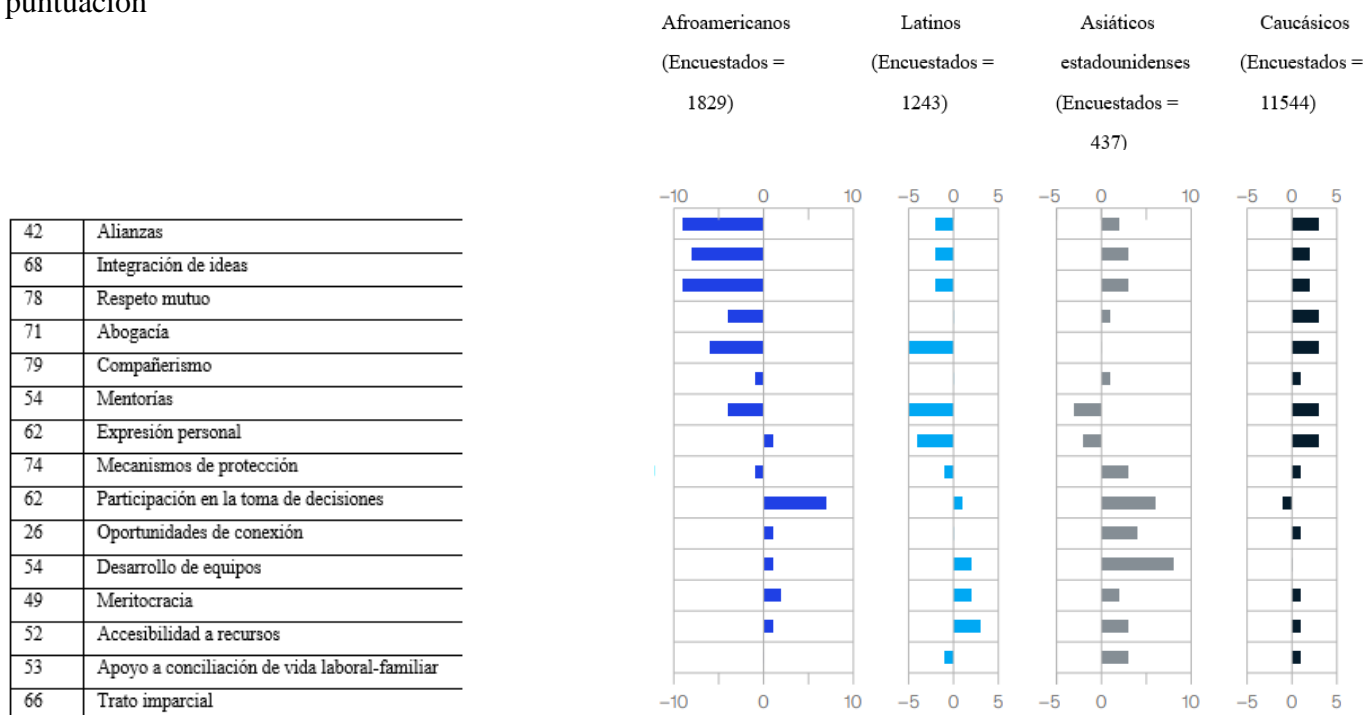
Mujer afroamericana de 42 años, enfermera registrada.

Gráfica 9

Experiencias de cada grupo racial en los puestos de primera línea de Estados Unidos, diferenciados por las brechas de inclusión.

Elemento de inclusión por empleado de primera línea de Estados Unidos, puntuación¹

Diferencia del promedio, puntos porcentuales



Fuente: Encuesta de Inclusión de McKinsey, 2020-2022.
Análisis de McKinsey (ve apéndice técnico para más información sobre la encuesta y el análisis metodológico)

¹ Empleados pagados por hora y asalariados. Clasificación de la puntuación: muy bajo, menor a 50; bajo, 50-59; medio, 60-69; alto, 70-79; muy alto, mayor o igual

Parte 2: Creando un camino de ascenso para la primera línea

El avance profesional a menudo requiere mucho más que solo trabajo duro. De hecho, la mejor forma en que los trabajadores pueden avanzar es moviéndose de un puesto a otro en progresión hacia arriba. La acumulación de habilidades y experiencia a lo largo del camino, pueden traer nuevas oportunidades.

Nuestro análisis evaluó las ocupaciones por su valor y rol en el avance profesional e identificó rutas para el avance. Encontramos que es posible para los trabajadores moverse de un puesto inicial de primera línea acompañado con inseguridad económica, a un puesto con ingresos de media clase y mejores prospectos profesionales.

La existencia de estas rutas debe ser causa de optimismo. También deben sobrellevar los prejuicios arraigados en el ambiente laboral que pueden limitar las oportunidades e impedir su avance profesional. De hecho, muchas de las funciones con estas rutas se basan más en habilidades interpersonales que en la educación formal. Ya que la evaluación de estas habilidades es intrínsecamente más subjetiva, permite que los prejuicios tengan una mayor influencia en las decisiones de ascenso.

Graficando la progresión de los puestos de primera línea a los puestos mejor pagados.

Un reciente esfuerzo investigativo de McKinsey buscaba identificar la progresión de los trabajadores de primera línea, así como los atributos y experiencias que permitían su avance profesional.¹⁸ Hemos analizado históricamente la progresión laboral de 4 millones de trabajadores sin un título universitario, también conocidos como individuos *calificados a través de rutas alternativas* (STAR por siglas en inglés),¹⁹ quienes tuvieron una transición exitosa de una ocupación de salario mínimo a alto e identificaron los puestos que crean rutas de avance a los puestos mejor pagados. La carrera profesional se segmentó en 5 categorías²⁰:

¹⁸“Desbloqueando progresiones laborales basadas en experiencia para millones de trabajadores” McKinsey, 2 de junio del 2021.

¹⁹“STARS: Skilled through alternative routes,” Opportunity@Work, tomado el 28 de julio del 2022.

²⁰La mayoría de los puestos de primera línea están concentrados en las categorías de origen y salario medio, pero solo un 20 por ciento son puestos meta.

- **Ocupaciones de origen** son puestos de primera línea con un salario menor a 37000 dólares. Personal de servicio, vendedores minoristas, y trabajadores de mantenimiento son los roles de origen más comunes.
- **Ocupaciones de origen de salario medio**, tales como mecánicos automotrices maestros y chefs cuentan con un pequeño aumento salarial (37000 dólares a 42000 dólares) para trabajadores provenientes de puestos de origen.
- **Roles históricamente adyacentes**, tales como agentes de carga y transporte, electricistas y enfermeros especializados, ofrecen un salto en el salario (a más de 42000 dólares), pero tienen un éxito limitado como ruta a cargos de mayor salario.
- **Ocupaciones de entrada** dan a los trabajadores la oportunidad de desarrollar habilidades y experiencia, y ganar más de 42000 dólares al año. Los roles de entrada incluyen gerentes de servicios alimenticios, enfermeros vocacionales y asistentes de radiología.
- **Ocupaciones meta** son puestos con un ingreso medio a alto (más de 42000 dólares) que son resistentes a la automatización. Las compañías frecuentemente contratan para estos roles basados en experiencia laboral, no solo títulos. Ejemplos incluyen gerentes de ventas, trabajadores sociales y enfermeros de cuidado crítico.

Para los propósitos de este reporte, nos referimos a ocupaciones de Origen de salario medio, de entrada, e históricamente adyacentes como puesto de “Siguiendo nivel”; ya que, representan un movimiento positivo para los trabajadores de primera línea en roles de origen. Consideramos los puestos de entrada los más valiosos porque permiten a los empleados moverse a una ocupación meta. Ocupaciones de origen de salario medio e históricamente adyacentes aún son consideradas un paso positivo porque ofrecen un aumento salarial, pero no ofrecen tantas oportunidades de progreso a roles meta.

La progresión de puestos de entrada a meta representa una ruta clara para la clase media, mejor salario, empleos de mejor calidad y mayor estabilidad económica y las oportunidades profesionales que vienen con ello.

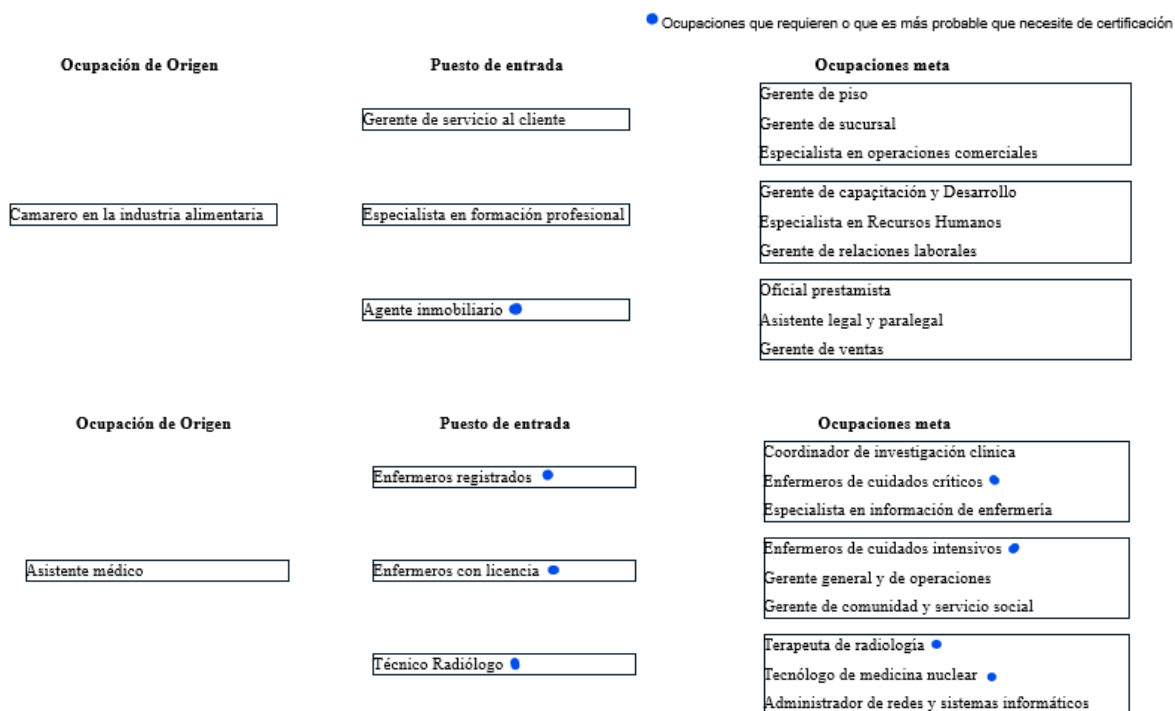
“Empecé como una cuidadora sin certificación, y luego eso progresó en la certificación como asistente de enfermería. El siguiente paso es ir por una certificación completa como enfermera” Latina de 22 años, enfermera asistente certificada

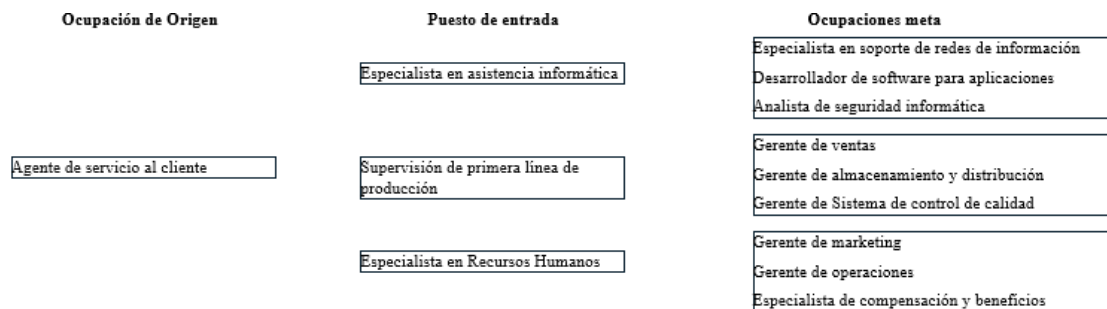
Ocupaciones seleccionadas tienen el potencial de acelerar el progreso profesional

Nuestro análisis identificó 77 ocupaciones de entrada que son especialmente efectivas como un puesto para desbloquear la progresión a un puesto meta (Gráfica 10). Estos puestos pueden ayudar a los trabajadores a desarrollar nuevas habilidades (por ejemplo: un agente de servicio al cliente moviéndose a un puesto de TI) o ampliar habilidades ya existentes por medio de experiencia laboral (tales como un asistente médico moviéndose a un puesto más avanzado en la salud). Aunque algunos puestos de entrada requieren de certificaciones, muchos no. Estas rutas pueden permitir a los empleados de primera línea basarse en su experiencia laboral y habilidades acumuladas para progresar profesionalmente. Los puestos de entrada son cruciales porque tienen el potencial de brindar al personal de primera línea con una ruta clara hacia la clase media.

Gráfica 10

Las ocupaciones de entrada ofrecen múltiples rutas hacia los puestos meta





Fuente: Modelo Económico (Emsi); Oficina de Estadísticas Laborales; “Desbloqueando progresiones laborales basadas en experiencia para millones de trabajadores” McKinsey, 2 de junio del 2021.

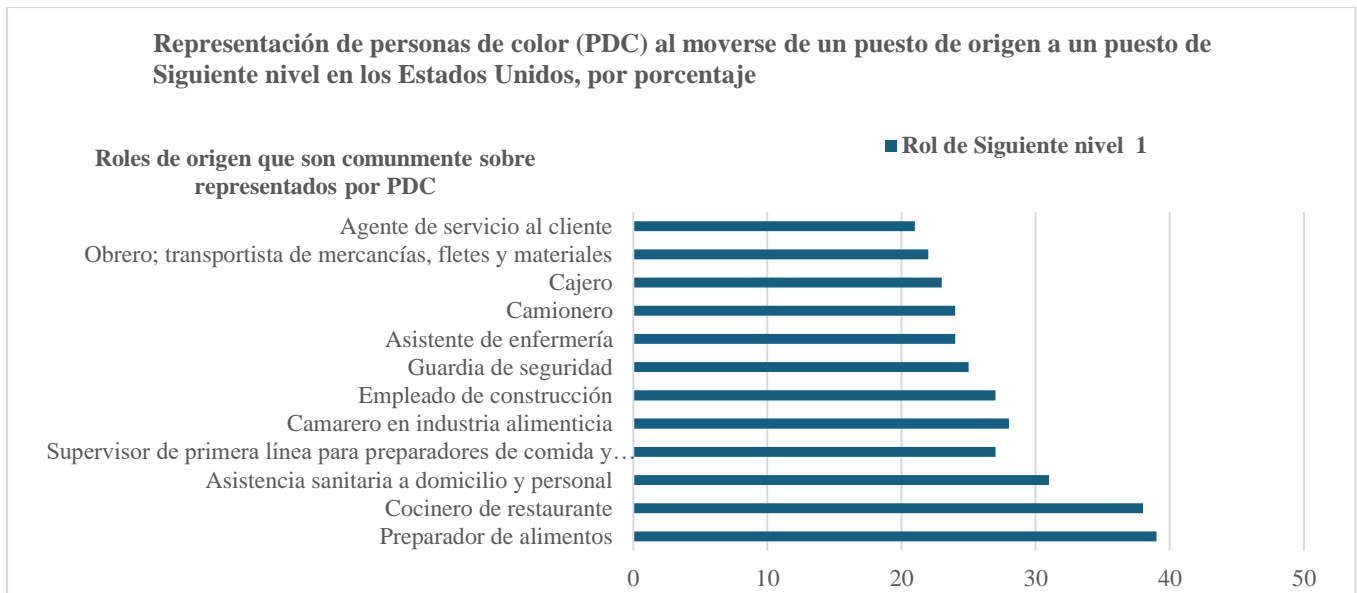
“He estado trabajando en el campo médico por los últimos 13 años. Empecé como un lavaplatos, luego subí a criado, luego subí a empleado de recepción y envíos, y ahora soy especialista distrital en servicios medioambientales.” Hombre afroamericano de 33 años, trabajador de servicios medioambientales

Los trabajadores caucásicos están representados desproporcionalmente en los trabajos del Siguiete nivel

Un análisis a profundidad de los roles de origen revela el acceso inequitativo a los trabajos que brindan una ruta a los puestos mejor pagados (Gráfica 11). Los puestos de origen en los cuales los empleados de color están sobre representados (por ejemplo: guardias de seguridad y camioneros) tienen rutas a los puestos del Siguiete nivel, pero los trabajadores de color no son promovidos a estos puestos.

Gráfica 11

Incluso en los puestos de origen en Estados Unidos donde las personas de color están sobre representados, los trabajadores caucásicos son los generalmente sobre representados en los puestos de Siguiete nivel de progresión.



¹ Cada puesto de origen tiene menor o igual cantidad de progresiones al puestos del Siguiete nivel.

Fuente: Modelo Económico (Emsi); Oficina de Estadísticas Laborales; “Desbloqueando progresiones laborales basadas en experiencia para millones de trabajadores” McKinsey, 2 de junio del 2021.

“Siento que mi raza y etnia impactan mi trayectoria en mi compañía. En los 12 años que he estado aquí, no he visto a muchas mujeres de color o personas de color ser promovidas. Ellos tienen una mentalidad anticuada: es como si solo nos vieran a cierto nivel en la organización, y no puedes ir más allá de eso.

Tenemos algunos brillantes y talentosos individuos afroamericanos, pero la cultura simplemente no les permitirá moverse o subir a posiciones que estén más allá del punto más bajo de la cadena. En algún momento, voy a tener que tomar la decisión de moverme a otro lado para lograr mis objetivos y sueños profesionales, porque no va a suceder aquí.” Mujer afroamericana de 50 años, supervisora de servicio al cliente

Las definiciones inconsistentes y limitadas de profesionalismo y habilidades interpersonales son barreras de avance profesional para los trabajadores de color

Parte del valor en moverse de un puesto a otro es la posibilidad de desarrollar las habilidades actuales y agregar nuevas. Las habilidades interpersonales son particularmente críticas: el 70 por ciento de los movimientos laborales a puestos de entrada o meta se basan en habilidades transferibles tales como liderazgo y habilidades sociales, las cuales pueden ser aprendidas por medio de experiencias laborales. Sin embargo, el contexto cultural en el cual el liderazgo y

las habilidades sociales son evaluadas típicamente, es fundamental de entender y a menudo funciona como una barrera.

La investigación ha encontrado que muchas organizaciones creen que los empleados de color carecen de las habilidades interpersonales necesarias para desempeñarse en nuevos puestos.²¹ Y cuando los empleados de color si poseen las habilidades requeridas, los gerentes suelen no reconocerlos, tal vez debido a factores tales como variaciones de cultura y lenguaje o prejuicios implícitos. En la transición de ocupaciones de origen a las del Siguiete nivel, los empleados afroamericanos pierden la mayor representación, mientras los latinos tienen ligeramente mejores resultados (Gráfica 12). Algunos trabajos son tales como servicio al cliente que requiere de habilidades interpersonales, gestión general y de oficina, ventas y técnicas de ventas, negociación, y desarrollo de equipos son los aspectos requeridos de forma más frecuente.

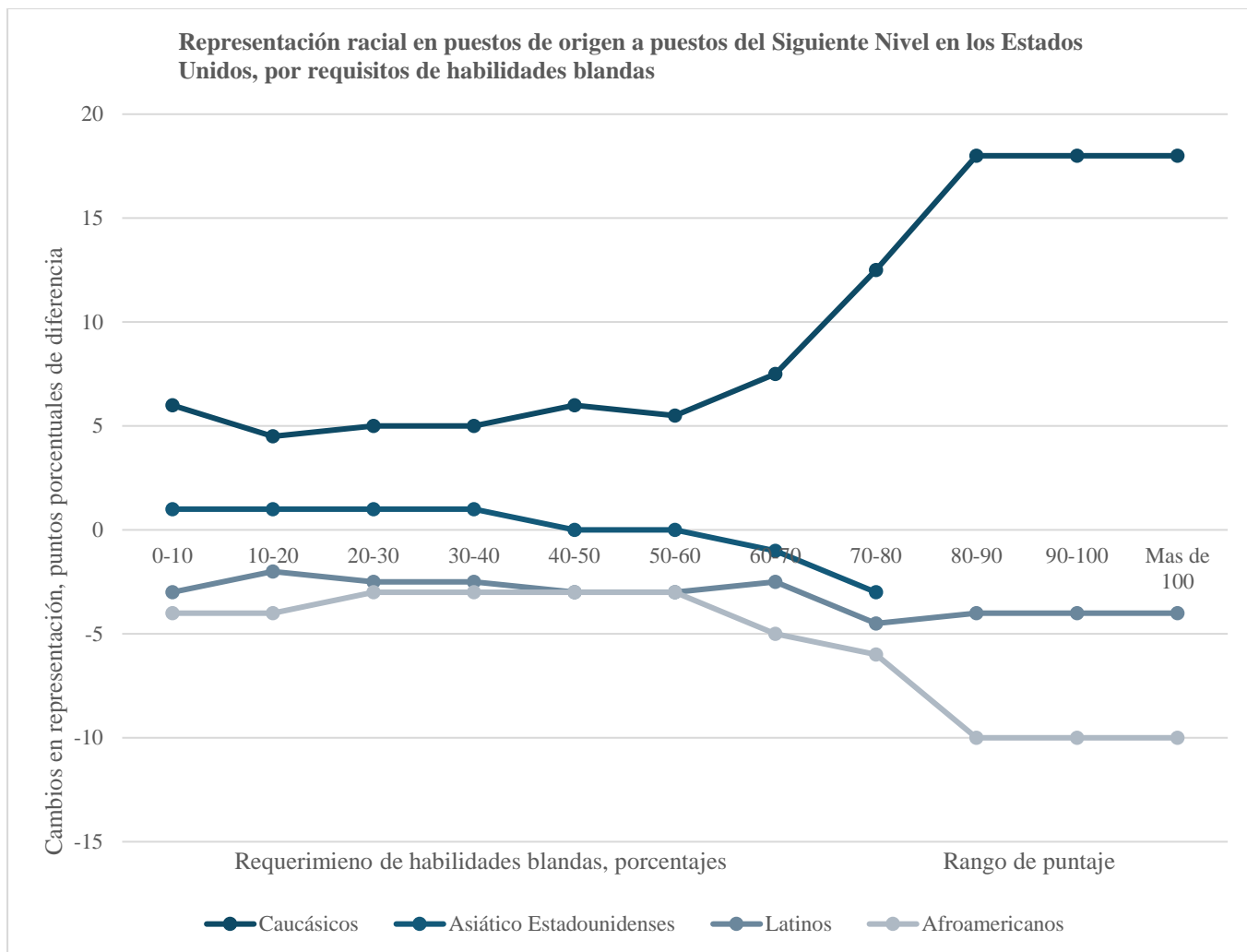
²¹ “Confrontando los estereotipos de Asiáticos Estadounidenses” 23 de junio del 2018; Daphna Motro y otros, “El estereotipo de ‘Mujer afroamericana molesta’ en el trabajo”, Harvard Business Review, 31 de enero del 2022; Marina Fernández-Reino y Ruta Yemane, “Latinos en los Estados Unidos y en España: El impacto de los estereotipos de grupos étnicos en los resultados del mercado laboral”, *Revista de Estudios Étnicos y Migratorios*, 2021, Volumen 47, Edición 6.

Los desafíos de evaluar habilidades interpersonales en la primera línea

Ya que los empleos de primera línea, a menudo, incluyen interactuar directamente con clientes y colegas, los trabajadores son comúnmente evaluados por sus habilidades interpersonales; los comportamientos y las habilidades que guían a interacciones efectivas. En el rol de servicio al cliente, por ejemplo, las habilidades interpersonales incluyen la habilidad de un empleado para entender porque un cliente esta insatisfecho y como resolver los problemas. El desafío es que cuando un supervisor evalúa las habilidades interpersonales del empleado, el ejercicio puede volverse rápidamente subjetivo y propenso a distintos tipos de prejuicios conscientes e inconscientes. Estos prejuicios pueden retener a los empleados de color de primera línea.

Gráfica 12

Trabajadores de color en Estados Unidos pierden representación cuando progresan de puestos de origen a puestos del Siguiete nivel, ya que el requisito de habilidades blandas incrementa.



Fuente: Modelo Económico (Emsi); Oficina de Estadísticas Laborales; “Desbloqueando progresiones laborales basadas en experiencia para millones de trabajadores” McKinsey, 2 de junio del 2021.

Parte 3: Un plan de acción por el cambio

Nuestra investigación y análisis ha demostrado claramente que el personal de primera línea quiere mejorar, progresar, buscar nuevas oportunidades, y encontrar roles que sean más gratificantes. En ese sentido, las compañías tienen el potencial de movilizar y desarrollar su

primera línea laboral, lo cual puede crear beneficios tanto para los trabajadores como para las organizaciones.

Aun así, las compañías deben proporcionar más apoyo al personal de primera línea para permitir su desarrollo profesional. Esto requeriría que las compañías obtengan un mayor entendimiento de lo que los empleados de la primera línea quieren realmente y esperan de su patrono.²²

²² Swathi Bhaskaran, Andrew Davis, Christophe Desbrière, y Sara Wasserteil, “Acortando la brecha de ascensos: Que desean los empleados de primera línea – y que creen los patronos que ellos quieren”, McKinsey, 21 de julio del 2022.

En una nota más positiva, hemos visto a las compañías implementar programas que pueden crear una experiencia laboral más rica y alentadora para la primera línea. Han empezado a expandir su apoyo y oportunidades a la primera línea, incluyendo salarios base más altos, programas de reembolso de gastos estudiantiles (tales como LiveBetterU de Walmart), mejores capacitaciones, horarios de trabajo más flexibles, red de cuidados infantiles, licencia de maternidad o paternidad, y pensión de retiro tales como las cuentas 401(k) y planes financieros.

Estas acciones son un buen punto de inicio, pero las compañías deben implementarlos en una base más amplia y luego continuar sobre esa base. Los ejecutivos deben extender sus programas de DEI a su primera línea – los empleados que son afectados más negativamente por la inequidad actual – y adaptarlos a las necesidades específicas de estos empleados. Las compañías también pueden actuar para asegurar el acceso equitativo de los empleados de primera línea a las oportunidades de desarrollo profesional. Además, pueden buscar transformar su cultura, incluyendo el asegurarse de que los gerentes tienen mayor consciencia cultural, para reducir el impacto de los prejuicios sobre las habilidades interpersonales. Las organizaciones han comenzado a apoyar prácticas de contratación más inclusivas y basadas en habilidades para más de 70 millones de trabajadores calificados a través de rutas alternativas.²³

²³ “El techo de papel”, Opportunity@Work, tomado el 28 de julio del 2022.

Esta sección ofrece un plan de acción para que las compañías aborden mitos sobre la primera línea e implementen soluciones para poder mejorar las vidas y subsistencias de los empleados de primera línea en una forma material. Colectivamente, estas acciones pueden trazar nuevas rutas de desarrollo, logros y prosperidad.

Abordando 3 mitos

Los empleados de primera línea reportan consistentemente una experiencia laboral carente y dificultad de moverse a otros puestos más gratificantes y mejor pagados. Estos desafíos constantes han impedido el progreso, porque los líderes corporativos no están al tanto de las barreras actuales que deben remover. Creemos que las compañías pueden hacer mejoras drásticas en la experiencia de la primera línea con las soluciones potenciales de 3 mitos.

Mito 1: Los empleados de primera línea son libres de ascender en la escalera corporativa.

Realidad: Mas del 70 por ciento del personal de primera línea quieren ser promovidos en sus compañías, pero solo un 4 por ciento pueden abrirse paso al lado corporativo.

Mientras que relativamente pocos trabajadores de primera línea son promovidos a puestos corporativos, no es por falta de interés. Al reconocer esta verdad, las compañías pueden cambiar su enfoque a incrementar este número. Las 3 acciones específicas que pueden abrir una ruta para más trabajadores son:

Formalizar las vías de avance de la primera línea hacia los puestos corporativos

Las compañías pueden remover las barreras artificiales para los ascensos y crear nuevas rutas que inicien en puestos de primera línea y vayan a puestos de mayor salario con mejores oportunidades. Esta prioridad tiene 2 elementos: primero, las compañías pueden facilitar las conversaciones con los empleados de primera línea para entender sus intereses e identificar las necesidades de mejora. Segundo, pueden remarcar de manera constante opciones internas de trabajo con potencial de avance profesional. Esta visibilidad mejorada puede combatir sistemáticamente las desigualdades al crear acceso igualitario a la información y recursos y asegurarse de que los candidatos calificados están al tanto de dichas posiciones.

Reformar el sistema de manejo de talentos de la primera línea

Implementar un enfoque sistemático sin prejuicios para que las revisiones de desempeño puedan ayudar a las compañías a identificar a los empleados de primera línea con oportunidades de ascenso y crear planes individuales de desarrollo profesional. Al adoptar estas prácticas basadas en habilidades (en lugar de títulos universitarios) a través del proceso de gestión de talento; desde la contratación hasta la entrevista e incorporación, desarrollo de habilidades, y ascensos internos, las organizaciones pueden ayudar a reducir los prejuicios y crear más oportunidades para movilizar los ascensos entre las personas de color. Las compañías también pueden usar análisis para reducir los prejuicios en la contratación,

revisiones de desempeño y ascensos para asegurar que los empleados de mayor potencial no sean descartados innecesariamente.

El impacto del patrocinio

“Empecé hace 5 años en esta industria en la que estoy actualmente. Mis patrocinadores han sido muy efectivos, y me han permitido rotar a puestos y aprender de diferentes departamentos. He sido capaz de aprender nuevos tipos de habilidades. En lugar de aprender una a tres cosas, he aprendido siete, ocho, nueve, diez cosas diferentes. He aprendido los diferentes aspectos de la compañía, ya sea haciendo entregas, revisando paquetería, o hablando con clientes.

Empecé como un repartidor. Luego ascendí a gerente de entregas, luego gerente de planta, luego gerente de ventas –todo en la misma compañía–. Y he obtenido promociones para aprender nuevas habilidades en cada ocasión.

Ahora tengo modelos a seguir y nuevas habilidades. Estoy aprendiendo de gerentes y líderes, lo que han hecho; sus fracasos y hábitos; como han triunfado. Y eso me ha ayudado a aprender a donde quiero ir.” Hombre latino de 23 años, gerente de ventas

Establecer un programa de mercado de talento

La ruta al ascenso con frecuencia incluye una progresión a roles de distintos tipos – por ejemplo, de agente de servicio al cliente a especialista de asistencia informática. Las compañías que no pueden acoplarse a estas rutas pueden asociarse con otras compañías (por medio de plataformas de talento y negociación) para desarrollar movimientos inteligentes de puestos para los empleados prometedores.

Mito 2: Los trabajadores de primera línea no están calificados para puestos de mayor nivel.

Realidad: el 70 por ciento de los ascensos a puestos de entrada depende de habilidades interpersonales transferibles, los cuales se aprenden mejor por medio de la experiencia.

Con la remoción de las barreras estructurales, los empleados de primera línea pueden tener una mayor probabilidad de moverse a puestos de mayor salario que pueden marcar el inicio

del ingreso a clase media. Las compañías pueden apoyar los ascensos al enfatizar la experiencia laboral práctica y crear más transparencia alrededor de las oportunidades y habilidades necesarias.

Definir las habilidades que los trabajadores de primera línea necesitan para los puestos de mayor nivel

Las compañías pueden catalogar las habilidades que los empleados de primera línea están obteniendo en sus puestos actuales y luego comparar estas habilidades con los requisitos específicos para los puestos del Siguiete nivel. Un ejemplo sería ascender de cocinero en un restaurante a gerente de comida a gerente de sucursal para la oficina corporativa. Así las compañías pueden trazar los potenciales ascensos para los empleados de primera línea se muevan de puestos de origen a los del Siguiete nivel. Este ejercicio puede incluir el determinar donde invertir en oportunidades de desarrollo para apoyar a los empleados a abordar sus brechas de habilidades.

Recompensar la experiencia más que depender de los títulos

Transformando las percepciones de que las habilidades interpersonales son un factor fundamental para el avance a puestos de entrada y meta. Las compañías deben considerar cambiar sus requisitos de contratación fuera del enfoque basado en títulos, sirviendo como un indicador para ciertas habilidades. Actualmente, el 75 por ciento de los trabajos requieren de un título universitario, pero solo un 40 por ciento de los aplicantes tiene uno.²⁴ En su lugar, las organizaciones pueden priorizar las credenciales que reflejen las habilidades relevantes mientras reconocen habilidades obtenidas por medio de la experiencia laboral. Para apoyar la adquisición de habilidades, las compañías pueden crear oportunidades basadas en proyectos para moverse de puestos de primera línea a gerencia o puestos corporativos, donde los trabajadores pueden exponerse a experiencias diferentes, aprender nuevas habilidades, y “fallar con tranquilidad”.

²⁴“Techo de papel” tomado el 28 de julio del 2022.

Identificar los puestos de entrada, y quitar las barreras artificiales para las promociones

Las compañías pueden compartir información sobre ascensos internos con los empleados de primera línea, enfatizando los roles de entrada disponibles para los empleados en ciertos puestos. Al dar importancia a los roles de entrada en un cambio de trayectoria profesional, las

compañías pueden asegurarse de considerar un grupo diverso de candidatos para estos puestos y aspirar a ascender a empleados en línea con una representación del personal de primera línea. Las compañías pueden rastrear y desglosar la información de ascensos por raza y género mínimo y proporcionar esta información a la gerencia.

Mito 3: Los altos índices de renuncias son solo la forma en que es la primera línea.

Realidad: Las compañías tiene una responsabilidad de crear una mejor experiencia laboral.

Por mucho tiempo, las compañías han aceptado que el gran desgaste de la primera línea es un hecho incambiable. Muchos empleados de primera línea reportan dejar sus trabajos debido a la falta de apoyo y sentido de pertenencia, pero no tiene por qué ser de esta manera. Pueden mejorar el ambiente laboral para hacer más positiva y sostenible la experiencia laboral. Al hacerlo, pueden capturar un rango de beneficios, desde incrementar su reputación hasta mejorar la habilidad de atraer talento.

Dar voz a los empleados de primera línea

La primera línea corresponde a una gran parte de la fuerza laboral total de muchas compañías, siendo el músculo operacional de la organización. Los ejecutivos pueden aprovechar los talentos del personal de primera línea al hacer un motor de innovación – recopilación de datos de empleados trabajando directamente con clientes, incluyendo empleados de primera línea en la toma de decisiones, y brindándoles una plataforma para compartir sus ideas con la gerencia general. Las compañías también pueden considerar expandir los beneficios, tales como Planes de Recepción de Acciones para Empleados (ESOPs como sus siglas en inglés), que pueden contribuir de manera significativa a creación de riqueza. Estos esfuerzos pueden apoyar a los trabajadores de primera línea a sentirse más incluidos y participantes del negocio.

‘Eleva los estándares’ en la experiencia de primera línea

Los empleados de primera línea reportan descontento con sus puestos actuales debido a la falta de oportunidades para el desarrollo profesional, el liderazgo carente de apoyo e inspiración, y los inadecuados paquetes de remuneración total. Al mejorar la calidad de trabajo pueden contribuir a la experiencia general y satisfacción de los empleados. Las compañías pueden considerar reformular los beneficios disponibles para los trabajadores de primera línea y expandiendo sus ofertas. Por ejemplo, apoyo a la salud mental, mayor flexibilidad en el ambiente laboral, y mejoría en la transparencia y predicción de horarios

puede ayudar a mejorar la experiencia de la primera línea. Además, las organizaciones pueden alentar a los trabajadores a tomar ventaja de estos programas.

Invertir en los supervisores de primera línea

Los supervisores de primera línea son la llave para moldear la experiencia de un empleado y en ocasiones es el único punto de contacto de un empleado. Las compañías pueden mostrar su compromiso a elevar la experiencia de la primera línea al mejorar la representación de los empleados de color en puestos de supervisión.

Las empresas también pueden proporcionar a estos líderes con instrucciones y recursos mejorados; por ejemplo, entrenamientos de diversidad y prejuicios, así como capacitaciones de resolución de conflictos basadas en justicia social. Supervisores que desarrollan mejores habilidades de escucha están mejor equipados a descubrir talentos prometedores, tales como trabajadores con habilidades interpersonales. Las compañías pueden invertir para asegurar que el apadrinamiento profesional efectivo sea una responsabilidad para los supervisores de primera línea. Las iniciativas pueden incluir una mezcla de entrenamiento práctico, mentoría, y creación de oportunidades.

Conclusión

Para decenas de millones de empleados de color, los puestos de primera línea pueden ser mucho más que un sustento. Las compañías que invierten realmente en la primera línea pueden hacer de estos puestos un punto de inicio para una carrera profesional productiva, una ruta clara para la clase media, y una forma de moverse a un puesto interesante en distintas industrias. Muchos empleos tienen pendiente lograr esta aspiración, pero para los empleados que han tradicionalmente pasado desapercibidos, el tiempo máximo para que las compañías brinden más oportunidades y apoyo, ha pasado hace mucho tiempo.

Rasgos en comunes de trabajadores de color de primera línea que han avanzado en su carrera profesional

Como hemos anotado, los trabajadores de color enfrentan múltiples obstáculos para progresar en los puestos de primera línea. Mientras las compañías muestren su apoyo por la primera línea, los empleados de color pueden seguir la guía de los compañeros que han navegado

exitosamente las rutas de avance profesional. Nuestro análisis sugiere muchos rasgos en común entre estos trabajadores.

Ellos reciben tantas mentorías prácticas como es posible. Estos empleados piden observar tareas de sus compañeros con mayor antigüedad para ganar más exposición y beneficios de la guía adicional. Estas interacciones informales generalmente se tornan en relaciones más formales de patrocinio.

Ellos están abiertos a tomar nuevas tareas. La experiencia laboral representa el 46 por ciento en promedio, de las habilidades acumuladas de una persona. Los empleados que voluntariamente se ofrecen a tomar nuevas asignaciones no solo amplían su conocimiento y experiencia, sino que también los distingue al mostrar iniciativa.

Ellos reforman su conjunto de habilidades para corresponder las aptitudes para los puestos de siguiente nivel. Estos trabajadores meditaron en como posicionar sus aptitudes, particularmente dando importancia a las habilidades interpersonales. Por ejemplo, un barista exitoso puede ser un experto en hacer café, pero también puede tener las habilidades más comerciales al proporcionar excelente servicio al cliente, con experiencia en ambientes de alto estrés.

Ellos buscan activamente por compañías que enfatizen el desarrollo profesional. Creer que todos los empleos y organizaciones son iguales es una trampa. Si una compañía no proporciona oportunidades de moverse a otros puestos, estos trabajadores buscan por patronos que apoyen la movilidad en la organización. Sin embargo, no todos los trabajadores tienen el tiempo y recursos para aplicar a nuevos puestos, la flexibilidad para tomar tiempo libre para entrevistas, o acceso a transporte para viajar a y desde las entrevistas. Este apoyo también sería integral para permitir a los empleados buscar nuevas oportunidades.

Apéndice técnico

Metodología

La investigación externa en este reporte está basada en los datos económicos y laborales del personal de primera línea en los Estados Unidos. Las fuentes consultadas fueron *Encuesta de*

Estadísticas de Empleo y Salarios del 2019 de la Oficina de Estadísticas Laborales, *Encuesta Actual de Población* del 2019 de la Oficina de Estadísticas Laborales, datos del EEO-1 del 2018 de la Comisión para la Igualdad de Oportunidades de Empleo, el *Censo Cuatrimestral de Empleo e Ingresos*, datos de EMSI (2019) y el Análisis de Moody. Los datos tomados de estas fuentes fueron combinados con información de la *Encuesta de la Comunidad Estadounidense* del 2019 de la Oficina de Censos de los Estados Unidos, para obtener perspectiva del personal de primera línea en diferentes razas. La información investigada fue previa al impacto de la crisis de la COVID-19 sobre la fuerza laboral de Estados Unidos, así que estos efectos no se reflejaron en la primera parte de este reporte.

La investigación de las compañías participantes está basada en 53 compañías, las cuales suman 4 millones de trabajadores y representan el volumen de la mayoría de las industrias a lo largo de Estados Unidos. Las compañías participantes proporcionaron datos de la red de talentos, y los profesionales de Recursos Humanos proporcionaron información de políticas, programas, y prioridades por sus compañías. Aproximadamente 15000 empleados de 10 de las compañías participantes fueron encuestados en su experiencia de inclusión en su ambiente laboral. La participación en la Encuesta de Experiencia del Empleado fue fomentada pero opcional. Toda la recolección de información sucedió de enero a mayo del 2022. Además, los testimonios y encuestas individuales se recolectaron de 52 trabajadores de primera línea para todas las razas y géneros. La información de la red de talento refleja la representación de empleados a diciembre del 2021, así como los cambios personales (por ejemplo, debido a ascensos, contrataciones o renunciaciones) durante el año calendario del 2021. El parámetro de amplia evaluación de inclusión toma las encuestas de retroalimentación de 31 compañías y 59000 empleados estadounidenses, entrevistados entre setiembre del 2020 y marzo del 2022. Estos grupos de información representan puntos exactos en el tiempo y reflejan la respuesta de las compañías y las experiencias de los empleados, al momento que fue tomada la encuesta. No recolectamos información directa de los empleados (por ejemplo, nombre, identificación laboral, dirección de correo electrónico) de las compañías o por medio de la encuesta.

Datos y análisis de la Red

Métricas generales

Todas las métricas de la red (por ejemplo, representación, rangos de ascensos, cuotas de contratación, cuotas de renuncia y despidos) fueron calculadas inicialmente para cada

compañía participante. Los resultados agregados a lo largo de las compañías fueron luego calculados al tomar el promedio ponderado de la representación, rangos de ascensos, cuotas de contratación, y cuotas de renuncia de todas las compañías.

Definición de niveles de empleos

Las compañías categorizaron sus empleados en 9 niveles diferentes basados en las siguientes definiciones estandarizadas, tomando en cuenta la estructura reportada y los salarios. Los niveles y definiciones proporcionadas fueron las siguientes:

- *Nivel 0 – Junta directiva.* Junta directiva oficial, responsables de las organización y gerencia.
- *Nivel 1 – Ejecutivos.* Director ejecutivo y sus subalternos directos, responsables de las operaciones de la compañía y rentabilidad.
- *Nivel 2 – Vicepresidente general y puestos similares.* Gerentes generales en la organización con unidad significativamente para el negocio o supervisión funcional.
- *Nivel 3 – Vicepresidente y puestos similares.* Líderes en la organización, responsables de las actividades o iniciativas en una subunidad de una unidad de negocios o función o que reportan directamente a un vicepresidente general.
- *Nivel 4 – Gerentes generales.* Gerentes temporales y contribuidores, responsables de múltiples equipos y funciones o unidades operaciones discretas.
- *Nivel 5 – Gerentes.* Gerentes novatos y contribuidores, responsables por equipos pequeños o unidades u operaciones funcionales.
- *Nivel 6 – Puestos de entrada.* Empleados responsables de realizar tareas discretas y participar en los equipos, normalmente en un ambiente de oficina o corporativo.
- *Nivel 7A – Empleado de planta o primera línea (asalariados).* Puestos operacionales asalariados o de cara a los clientes, normalmente entrenados en el rol y no requiere de títulos especializados.
- *Nivel 7B – Empleados de planta o primera línea (supervisores pagados por hora).* Puestos operacionales o de cara a los clientes, normalmente entrenados en el rol y no requiere de títulos especializados; especialmente para puestos que manejan o supervisan al menos a una persona.
- *Nivel 7C - Empleados de planta o primera línea (trabajadores pagados por hora).* Puestos operacionales o de cara a los clientes que funcionan por hora, normalmente entrenados en el rol y no requiere de títulos especializados.

Métricas y analíticas

La información de la Red de Talento incluye la representación racial y étnica (general y por género). Adicionalmente, las compañías reportaron el número de individuos por cada raza que fueron contratados, ascendidos, o que dejaron la compañía (general y por género).

Los rangos de ascensos y renunciadas-despidos fueron calculados por cada raza en general en cada nivel. La cantidad de ascensos fueron calculados al dividir la cantidad de ascensos de individuos de cada raza por nivel, entre el número total de ascensos en el mismo nivel. Los niveles de renunciadas-despidos se calcularon al dividir el número de individuos por cada raza que dejaron la compañía por cada nivel, entre la cantidad de individuos por nivel.

Encuesta de experiencia del empleado y analíticas

Encuesta de participación

Más de 15000 empleados de 10 compañías fueron seleccionados para participar de la *Encuesta de Experiencia del Empleado*. Las preguntas de la encuesta abarcaban múltiples temas (por ejemplo, apadrinamiento profesional, mentorías, retroalimentación, desarrollo profesional, y Grupos de Recursos para Empleados), así como preguntas demográficas (por ejemplo, edad, raza, género, y orientación sexual). La encuesta también incorporaba la *Encuesta de Inclusión* de McKinsey.

Reporte estadísticos bi-variables y multi-variables

Los resultados de la encuesta se reportaron como un promedio ponderado y conjunto de las respuestas recibidas a través de las compañías. Muchas de las preguntas ofrecían un sistema de 5 puntos, denotada la escala de respuestas (por ejemplo, “Completamente en desacuerdo” hasta “Completamente de acuerdo”). A menos que sea especificado de otra forma, los análisis suman los puntos superiores e inferiores de la escala de respuesta (por ejemplo, “Un poco de acuerdo” y “Completamente de acuerdo”). Donde remarcamos las diferencias entre las razas y otros grupos, marcamos únicamente las diferencias que son sustanciales y confiables. Con ese fin, todas las diferencias anotadas en este reporte son estadísticamente significativas a un nivel de confiabilidad del 95 por ciento (usando una prueba bilateral) y refleja una diferencia de al menos 5 puntos porcentuales entre 2 grupos.

Evaluación de inclusión

Metodología detrás de la Evaluación de Inclusión

La Evaluación de Inclusión de McKinsey proporciona 2 formas de ayudarnos a entender el estado de inclusión: puntuaciones y brechas. Las puntuaciones de inclusión muestran las percepciones de la inclusión indicadas por un porcentaje favorable de respuestas. Las brechas muestran las diferencias en puntuación entre los grupos de empleados (por ejemplo, en los grupos y fuera de los grupos) que representan la inconsistencia entre las experiencias.

Hay 4 mediciones de inclusión en la evaluación:

- *Puntuación de inclusión general.* Esta refleja el grado en el cual los procesos, sistemas y personas en una organización fomentan un entorno acogedor y justo para que todos los empleados puedan ser ellos mismo, hagan conexiones, y contribuyan de manera significativa. Es medido al promediar la puntuación a nivel individual y de toda la empresa.
- *Puntuaciones inferiores.* Las puntuaciones inferiores de la percepción empresarial nos dicen como los empleados ven la fuerza de aceptación, camaradería, y equidad a lo largo de todos los grupos de la empresa. Las puntuaciones inferiores de experiencias individuales nos dicen el cómo los empleados se sienten personalmente alentados a ser su yo auténtico y pleno en el trabajo (autenticidad y pertenencia) y empoderados a hacer contribuciones significativas (trabajo significativo).
- *Resultados de las puntuaciones de inclusión.* Estos nos indican la efectividad de moldear una organización inclusiva y son medidos por un porcentaje de respuestas favorables en la escala de acuerdo. Ejemplos incluyen aceptación, autenticidad, y pertenencia.
- *Puntuaciones de inclusión práctica.* Estas muestran la frecuencia de los comportamientos y acciones que manejan la inclusividad y son medibles por un porcentaje favorable de respuestas en una escala de frecuencia. Ejemplos incluyen apoyo a conciliación de vida laboral y familiar, meritocracia, mecanismos de protección, desarrollo de equipos, y otros más.

Entrevistas a empleados

Los puntos de vista sobre experiencias en este reporte provienen de las encuestas que hicimos a aproximadamente 15000 empleados de 10 compañías participantes y los amplios parámetros de la *Evaluación de Inclusión*, los cuales incluyen las encuestas de retroalimentación de 31 compañías y 59000 empleados estadounidenses, encuestados entre

setiembre del 2020 y marzo del 2022. Además, recolectamos testimonios individuales de 50 trabajadores de primera línea y el análisis preliminar de experiencias de 1600 trabajadores.

Ejemplos de Modelo de Ocupaciones de Origen-Meta-De entrada

Ejemplos de roles por tipo de trabajo

La lista no es exhaustiva

Roles con la mayor representación por raza

Asiático Estadounidenses Latinos Afroamericano Caucásicos

De origen	De origen de salario medio	Adyacentes	De entrada	Meta
Manicuristas y pedicuristas	Chefs y cocineros jefe	Acupunturistas	Analistas y probadores de control de calidad de software	Desarrolladores de software
Clasificadores de productos agrícolas	Escayolistas y estucadores	Agentes de carga y transporte	Gerentes de servicios alimenticios	Supervisores agrarios, de pescadería y silvicultura
Asistentes de enfermería	Clasificadores de correo postal	Trabajadores sociales sanitarios	Enfermeros especializados con licencia o vocacionales	Trabajadores sociales
Científicos conservacionistas y silvicultores	Directores y líderes de actividades religiosas y de educación	Fabricantes de herramientas y moldes	Higienistas dentales	Gerentes agrícolas
Panaderos	Mecánicos automotrices maestros	Mecánicos y técnicos en mantenimiento de aeronaves	Analistas de crédito	Contadores y auditores
Cajeros	Conductores comerciales	Electricistas	Bomberos	Analistas de inteligencia de negocios

Entrenadores	Bailarines	Planificadores de restauración ambiental	Aseguradores	Enfermeros de cuidados críticos
Empleados de construcción	Entrenadores físicos	Técnicos de laboratorio	Diseñadores de interiores	Ingenieros
Empleados de mantenimiento y reparación	Diseñadores gráficos	Directores musicales	Agentes prestamistas	Analistas de estudios de mercado
Asistente sanitario personal	Asistentes de Recursos Humanos	Enfermeros especializados	Paralegales	Director de mercadeo
Vendedores minoristas	Secretarios legales	Optometristas	Asistentes de radiología	Vendedores en línea
Encargados de almacén	Terapista de masajes	Farmacéuticos	Agentes inmobiliarios	Detectives de policía
Conductores de taxi y choferes	Parteras	Plomeros	Gerentes de servicios sociales y a la comunidad	Profesores de educación especial
Leñadores	Operadores de policía, bomberos y ambulancias	Profesores de enseñanza superior	Asistentes quirúrgicos	Gerentes de cadena de suministros
		Alguaciles y ayudantes de alguacil	Recolectores y examinadores de impuestos	Inspectores
		Pilotos de barcos		Terapeutas
		Veterinarios		

Clasificación laboral y ejemplos según *Igualdad de Oportunidades de Empleo (EEO)* como sus siglas en inglés)

Los datos de la Comisión de Igualdad de Oportunidades de Empleo *EEO-1*, los cuales están basados en las declaraciones de todas las compañías con más de 100 empleados, permite la comparación en ambos, industria y clasificación laboral. El *EEO-1* incluye 9 clasificaciones laborales basadas en responsabilidades y deberes primarios, conocimiento y capacitación, y el nivel de habilidad que requiere el empleo. Analizamos estos datos para entender la

intersección entre las industrias donde están concentrados los trabajadores de primera línea, y su clasificación laboral.

Clasificación laboral	Ejemplos de títulos laborales
Gerentes y ejecutivos	Director Ejecutivo, director de TI (CIO como siglas en inglés), Directores asociados, presidentes, vicepresidentes, directores, gerentes
Profesionales	Abogados, contadores, pilotos, enfermeros, farmacéuticos, diseñadores, profesores
Técnicos	Redactores e inspectores, técnicos de emergencias médicas, técnicos ingenieros de difusiones y sonido
Trabajadores de ventas	Agentes de seguros, vendedores por televisión, vendedores minoristas, cajeros
Personal de oficina y administrativo	Personal auxiliar de oficina, auditores, agentes de carga y transporte, editores de escritorio
Artesanos	Mecánicos automotrices, carpinteros, electricistas, pintores, plomeros
Operarios	Carniceros, panaderos de fábrica, operador de montacargas industrial, trabajadores de lavandería, trabajadores de textiles, camioneros
Obreros	Obreros de construcción, transportistas de cargas, cuidadores, limpiadores de tanques sépticos, limpia carros
Trabajadores de servicio	Estilistas, conserjes, cocineros, asistentes médicos, acomodadores, policías, guardas, detectives privados

Clasificación laboral y ejemplos según Oficina de Estadísticas Laborales (BLS como sus siglas en inglés)

Las Estadísticas de Empleos Ocupacionales de la Oficina de Estadísticas Laborales proporciona los grupos ocupacionales de los trabajadores a lo largo de las industrias.

Grupos ocupacionales	Ejemplos de ocupaciones
Arquitectura e ingeniería	Arquitectos paisajistas, ingenieros eléctricos, ingenieros nucleares, inspectores
Artes, diseño, entretenimiento, deportes y media	Artistas, diseñadores de modas, actores, atletas, músicos, escritores, fotógrafos, técnicos de iluminación

Limpieza y mantenimiento de edificios y terrenos	Trabajadores de limpieza de edificios, trabajadores de control de plagas, trabajadores de mantenimiento de terrenos
Operaciones de negocios y financieras	Especialistas de operaciones de negocios, logísticos, especialistas financieros, oficiales prestamistas
Servicios a la comunidad y sociales	Trabajadores sociales, líderes religiosos, terapeutas matrimoniales y familiares
Computadores y matemáticos	Analistas en sistemas computacionales, programadores de computadoras, actuarios, estadistas
Construcción y extracción	Caldereros, colocadores de piedra y teja, electricistas, vidriero, obreros de construcción, fontaneros
Instrucción educacional y librería	Profesores de educación superior, maestros preescolares, profesores de enseñanza especial, bibliotecarios, archiveros
Producción agraria, pescadería y silvicultura	Agricultores, trabajadores madereros, trabajadores forestales y conservacionistas
Preparación de comida y relacionados con servicios	Cocineros, camareros, cantineros, lava platos, anfitriones
Especialistas y técnicos en salud sanitaria	Dentistas, farmacéuticos, veterinarios, médicos de medicina interna general, técnicos sanitarios, enfermeros vocacionales licenciados
Soporte de salud sanitaria	Auxiliares psiquiátricos, camilleros, auxiliares sanitarios a domicilio, terapeutas masajistas, asistentes médicos, auxiliares farmacéuticos
Instalación, mantenimiento y reparación	Instaladores eléctricos, mecánicos de equipo, mecánicos de equipo vehicular y móvil, reparadores de electrodomésticos
Legal	Abogados, jueces, paralegales
Ciencias sociales, físicas y vitales	Microbiólogos, epidemiólogos, astrónomos, químicos, hidrólogos, historiadores
Gestión	Ejecutivos en jefe, gerentes de mercadeo y venta, gerentes financieros, gerentes de servicios alimenticios
Suporte administrativo y de oficina	Telefonistas, corredores de bolsa, nuevos empleados contables, despachadores, transportistas, mensajeros
Servicios y cuidados personales	Trabajadores de servicios y cuidados animales, embalsamadores, asistentes fúnebres, trabajadores de aspecto personal, trabajadores de guarderías
Producción	Ensambladores, fabricantes, trabajadores de procesamiento alimenticio, trabajadores metalúrgicos, soldadores, pintores

Servicios de protección	Bomberos, agentes del orden público, empleados de control animal, guardias de seguridad
Ventas y relacionados	Cajeros, agentes de viajes, modelos, agentes inmobiliarios, vendedores a domicilio, vendedores por televisión
Transporte y movilización de materiales	Operadores de motores vehiculares, trabajadores de transporte de agua, técnicos del tráfico, aparcacoches

4.2 Translation Spanish to English

Universidad de Costa Rica

Western Headquarters

Social Sciences Department

Social Work University Program

**Final Project to obtain a Bachelor's degree in Social Work, under Seminar
modality**

**The feminization of unpaid caregiving work: the experience of six women
elderly relatives' caregiver from rural areas of Barranca, Puntarenas;
Ángeles Norte and La Paz, Piedades Norte, San Ramón, Alajuela**

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Campus Carlos Monge Alfaro

2023

Abbreviations

ASCADA: Alzheimer and other Associated Dementias Costa Rican Association

CEDAW: Committee for the Elimination of Discrimination against Women

CEPAL: Economic Commission for Latin America and the Caribbean

CIEM: Research Center for Women's Studies

CONAPAM: National Council of the Elderly Person

CONAPDIS: National Council for the Integration of Persons with Disabilities

COSEVI: National Road Safety Council of Costa Rica

CCSS: Social Security Fund

DST: Sexual Division of Labor

ENAHQ: National Household Survey

ENUT: National Time Use Survey

FAO: Food and Agriculture Organization of the United Nations

FONATEL: National Telecommunications Fund

GAM: Greater Metropolitan Area

IDA: Agricultural Development Institute

IMAS: The Mixed Institute of Social Aids

INA: National Institute of Learning

INAMU: National Women's Institute

INDER: Rural Development Institute

INEC: National Institute of Statistics and Censuses

INS: National Insurance Institute

MEP: Ministry of Public Education

MICITT: Ministry of Science, Innovation, Technology and Telecommunications

MIDEPLAN: Ministry of Planning and Economic Policy

MTSS: Ministry of Labor and Social Security

MUSADE: Women United in Health and Development

OIT: International Labor Organization

OMS: World Health Organization (WHO)

ONU: United Nations

PANI: National Children's Trust

PEDRT: Territorial Council for Rural Development

REDCUDI: National Child Care and Development Network

SEPSA: Executive Secretariat for Agricultural and Livestock Sector Planning

SINCA: National System of Care and Support for Adults and Older Adults in Dependency

Chapter 1

General Aspects of the Research

1.1. Justification

It is a fact, that society since its constitution has been organized separating responsibilities and duties per gender assigned at birth. This process is defined under the Sexual Division of Labor, which nowadays, has become the production and reproduction basis; hence, it not only establishes the perception of work performance according to biological gender; but also, delimits a route that converges differences between men and women in aspects such as caregiving, labor, social conversion rate, wages, and type of jobs which should be socially recognized (then paid), and other aspects linked with social production and reproduction.

Even centuries after the first society organization, women remained enclosed to take care of private space and unpaid labor, including domestic chores and caregiving work. Because as Frederici (2013) states, this role:

[...] not only has been imposed on women but it has been transformed into a natural tribute of our female psyche and personality, an internal necessity, an aspiration, supposedly coming from our inner feminine self as women. [...] It was transformed into a natural attribute [...]. (p. 101)

The previous citation proves that private space and caregiving work, have as a basis an ideal that came from and is centralized on this “natural attribute”, in a strong internalization in every single woman; that is why, the private space, which is related to reproductive, caregiving, and domestic paid and unpaid work, and others; are socially recognize as exclusive to woman. Likewise, it all converges on imposed elements, transformed and mainly under social construction, that now only has been historical and material to enclosed women; however, has also limited their decision and possibility to be incorporated into other spaces, but in a visible way, creating an illusion that it is natural.

That is how, as a product of these socio-historical transformations, it is constructed a social thought on which women are comprehended as those who should be in charge of sociably imposed roles like caregiving work. For example, the third State of the Women's Human Rights in Costa Rica (2019) states that little more than 65% of the population, prefers to assign home caregiving duties to the mother, women within the family, or outside it (but

always women), as they considered that with women, the dependent person, will be “best take care of”, and not only that, besides it also demonstrates the entrenchment that exists to enclosed them to private spaces regardless of age, as in several cases they are young girls, teens, adults, and elderly women who have to perform this work.

The previous statement brings a determined logic in which it is socialized and organizes a population and social relationships, also generating a specific perception and materialization form of life in society (laws, institutions, agreements, and others). This could be of great interest to institutions and organizations that constantly working to influence the legal and political regulations that redistribute the issue of domestic burden and caregiving duty to women, especially if considered that more than half population (in men and women), still insist in “voluntarily” recharging the caregiving work, especially the caregiving related to population that requires supervision and constant effort, such as elderly, infants, people with disabilities, among others. This train of thought, being naturalized and collective, is materialized in society institutions and the way they invest in these habitants’ realities.

In view of that, Anzorena (2008) exposed:

[...] the socially assigned place as a priority for women has been configured around the family caregiving functions and domestic chores. Thereby, the domestic link was turned into the primary woman role definition in capitalist societies. Their participation in production is understood as complementary or secondary to their primary function, taking a subordinate and lesser valued place related to production, compared to men. (p. 14)

Under this logic, the result is that women, as a social imposition, will get assigned unpaid caregiving work, as it is socially, physically, and mentally believed that they are capable of performing it and that it is their role to fulfill in society. Besides, it is evident that this natural attribute “characterized” by women, converges in a devaluation of caregiving work, as it is not considered a work requiring the same time as others as it is sustained by ideals coming from biological capabilities that State and labor market support.

On this, Federici (2013) declares that:

Capital must persuade us that it is natural, inevitable, and even an activity that makes you feel fulfilled, to make us agree to work without an income. Moreover, the unpaid status of domestic work is the strongest weapon to strengthen the extended assumption that domestic work is not a job. (p. 101)

The previous citation demonstrates how women are a vital element in sustaining capitalism as they assume domestic chores and child and elderly care for free, thus, their insertion into the job market was identified as a threat to maintenance and reproduction for the workforce and men control over the public and private spheres; as it is questioned how the salaried job could put at risk the idea that women cannot attend caregiving and familiar duties, for being immersed in the workforce.

In that sense, considering women as skills carriers, they are only allowed to be second-category workers and making their capabilities only oriented to reproduction and life-care, having as a result the invisibility and little or null recognition of the labor they realized, due to a presumed biological capability designation.

Then, it is comprehended that all this designation took women to be in charge of private and reproductive space, forcing them to stay in the space, even when the system demands the attrition of women from the work market to guarantee higher production and capital accumulation.

As a result, the women outbreak from private space to paid workforce has been conditioned for various factors such as women and feminist social movement claims, needs satisfaction, also, technological development, wage cost policy, organizational forms of production, economic factors of familiar needs (Agenjo, 2021), and this without taking into account the big fights of social movements to claim inclusion and the compliance of women rights regarding their incorporation to the job market.

Although the economic and social system needs women to be incorporated into the workforce, the reality is that they cannot leave the caregiving work aside, as how it has been mentioned they have been obligated to take responsibility for this labor and must assume it even when being part of the workforce market.

An example of the previous statement is as presented by the National Institute of Statistics and Censuses (referred to as INEC from now on), where it is demonstrated that women had increased their involvement in the job market since the millennium beginning, preceded by still existing diverse crisis. However, they still assumed domestic chores first, expending approximately more than 36 weekly hours, and a global job charge of 73 weekly hours, compared to men who expended approximately half the same time (INEC, consulted on 2021).

These data highlight that even though women are part of the paid workforce if they live with dependent people in a private space, their caregiving and attention responsibility, revert almost exclusively to women, creating a thorough labor overcharge (double or triple working hours) and precluding them to dedicate themselves to other spaces or activities.

It is needed to enhance this last idea, as several women have been forced to assume the elderly relatives or dependent people caregiving; implying, that in some cases there are extended periods of caregiving, limiting them to get jobs with labor related to caregiving. Contrary to men, when involved in these activities, they do it less often, and even less if it affects their daily activities.

This discussion presents a concrete reality on which women had turned into the base of domestic space functioning, causing almost all women's available time to be invested in this type of work and caregiving labor; although, that has not been socially recognized as a job, prioritizing these functions even before personal development. Which keeps generating inequality regarding gender roles, and time investment in everyday life.

Meanwhile, considering the rural areas context, the reality of women's incorporation to paid workspace has become more complex due to in rural areas where a series of factors and particularities dominate, such as work overload, lack of economic autonomy, missing work sources, job instability; as the existing ones are precarious, which affect the women life quality in rural zones, as exposed by Bedoya and Velasquez (2020), causing that they see the responsibility to assume the caregiving labors.

The previous, are reflected on The National Time Use Survey (referred to as ENUT from now on), performed by INEC, 2017; which exposed that in rural spaces women usually spend 26 hours of unpaid caregiving labor, totally dominated by caregiver women and daughters. Even in this work, not is the comparison between rural space particularities and urban space ones; it is noticeable the fact that, even though there is caregiving work feminization, it is in rural areas where this feminization increased because of economics, politics, and cultural factors.

Then, in Costa Rica, the rural zone ordinariness continues to be compromised by particularities such as unpaid caregiving work, and lack of job opportunities, among others; which, had their impact on women and elderly populations as a consequence.

On this, can be considered that rural space acquires a vital importance for the development of this research, having into account the lack of exploration presented in relationship with ordinariness and specific socialization generated for Costa Rican women related to elderly caregiving work, as the social time dedicated by rural women to unpaid work is higher than the one by urban women (INEC, 2018).

The previous is a particularities reflex of what rural areas women afront about the caregiving work charge; as a result, it was selected the regions of Barranca, Puntarenas; Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela; as they are located in rural areas characterized by remoteness of basic services, educational institutions, etc.

In this sense, from a Social Work perspective, it is of high importance to put into practice the diverse tools acquired during the University program progress, to analyze, visualize, and intervene in situations that outrage against the decent control and development of human life, the one is affected by a system which exposed the access to decent life conditions for supposedly inferior sectors.

Evaluating the previously exposed, as researchers and social workers, it is considered that the analysis about the feminization of caregiving work, starting from women's experiences in rural areas, and that performed this work daily and within their family circles without a payment, contributes to their experiences to be visible and recognize as a reality that can and should be a problem and socially evaluated, with the objective of intervene from all dimensions of social work.

In such sense, as professionals, students, and women, it is considered that inequality in caregiving duties distribution, and the double working hours it represents, hinders to a great extent the personal realization that many women, in a higher degree in geographic areas lacking study, work, and community organization opportunities; turns the private space, in the only possible one where women can develop themselves, causing an unfavorable number of situations in a collective way.

Finally, when noticing unpaid work, especially performed by women, it is part of a fight presented in different historical moments and continues nowadays; for example, from feminist collectives and social movements, with a basis and cause presented in the system structure, continues without further modifications, an aspect reflected in the caregiving inequity gap.

1.2 Problem Statement

The issue of feminization of caregiving work can have many manifestations, which are appreciated in various spaces where women develop themselves, socially, economically, culturally, politically, religiously, and others. It has to be remembered that these spaces are not isolated and that the disturbance of any of them can destabilize the woman's presence in the others; or can restructure her in a certain way, in line with the dominant groups and system's interests. Following this, all these spaces are part of the same reality and when constructed individually, affect their collective structure and vice-versa.

The capitalist system, with its diverse spaces, in which women are included till a certain point, had matched with the patriarchal system which determined the jobs to be taken by women and the pay assigned to them, this was based on a highly divided human work sexual division. In this context, caregiving work is one of the best examples, as historically, society has assigned it to women. The form that the patriarchal system has constructed the social relationships and the vision of its implemented reality; is probably one of the aspects that highly contributed to the feminization of unpaid caregiving work, as women not only assumed the labor by social imposition, but also, that same system has turned it into part of culture and woman's desires.

In that sense, caregiving work is socially and culturally attributed to women, but at the same time, it modifies the laws and juridic system under which society operates; as a result, those laws, agreements, and political speeches had maintained that vision of caregiving work as a job assumed by women, playing a high importance role when generating the rules and social agreements with a very high credibility level and that legitimates the feminization of caregiving.

Even when related to law advancements to match the time for caregiving work for both genders; for example, the extension of paternity leave for fathers, as there is the collective idea that equality in caregiving work is not needed, because women are who take the greater physical and mental capacity when taking on this task, and not men.

This can help to comprehend why it is said that unemployment tends to be related to women, as they are usually in charge of caregiving, thus, nowadays, employers tend to prefer people without these responsibilities. Due to these, there are few entrances to formal workspaces, and as a result, women had to decide between one and the other: work/study or caregiving, or life with double or triple working hours.

This sociocultural and economic context intensifies when looking up the rural regions, as the time spent at caregiving work is proportionally higher, dedicating almost double working hours than in the urban regions. The previous statement does not have to be the indisputable rule, but it does reflect the reality of being part of multiple debates, especially when talking about development, inequality, poverty, and exclusion.

Rural zones of the country, are evidence of a great neglect from the government, obstructing the access of these zones to a great diversity of basic services, as well as the absence of state representation through institutions, which are very centralized in the Great Metropolitan Area, hardly covering the coastal areas and indigenous territories. Moreover, must be highlighted the lack of development, investment, and employment opportunities, that generally characterize the rural zones, and that are not news in Costa Rica.

Then, can be considered that this lack of opportunities and the government's neglect generate a great magnitude impact on the population inhabiting rural zones, because the work or study options are lacking, in poor conditions, and even without growth or social mobility possibilities. The lack of opportunities has many women staying in the private sphere or the informal workspace, taking even more caregiving work every day for longer periods, especially when the context is between the familiar space, where there “should not” exist an excuse to not take family caregiving duties.

In the same way, it is of interest to comprehend the dynamic on why when caregiver women from rural zones can join other spaces, such as employment, educative, or any community organization, among others; implies that another woman from the same familiar sphere assumes the caregiving duties, meaning it is transferable or inherited, within the same family; keeping the same line of women being caregivers. For example, a woman, head of household, has to delegate the dependent person's caregiving duties to her mother, daughter, sister, sister-in-law, or even nieces; to allow her to incorporate other spaces, but is just a few occasions, can male familiars, risk himself to the collective social and familiar judgment, for not being the woman the one focused on caregiving duties.

In line with previous statements, a research team that believes in a need to investigate caregiving work as a socially feminized duty, trying to expand the current knowledge about it, for which is imperative to analyze this issue from different voices living this reality daily: caregiver women. Based on that, it is presented next the questions and objectives pretended to achieve in this investigation process.

1.3 Investigation questions

1.3.1 General investigation question

In which way influence the social, economic, and cultural conditions of the daily spaces to women that live in the areas of Barranca, Puntarenas; Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela; in the reproduction of feminization of unpaid caregiving work?

1.3.2 Secondary investigation questions

- In which way do the economic structural factors in the gender distribution of unpaid caregiving work?
- How do the social and cultural constructions of the mentioned rural spaces influence the distribution of unpaid caregiving activities between women in the same familiar sphere?
- Which aspects of daily life spaces for women living in rural zones mentioned, are affected by the impact of unpaid caregiving activities?

1.4 Objectives

Following, are exposed the objectives that guided the theoretical investigation process and its respective fieldwork and analysis.

1.4.1 General Objective

Analyze the impact of social, economic, and cultural particularities in the reproduction of feminization of unpaid caregiving work in daily life spaces for elderly caregiver women, in the regions of Barranca, Puntarenas; Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela.

1.4.2 Specific Objectives

- Analyze the influence of structural economic factors on the gender distribution of unpaid caregiving work.
- Establish the relationship between social and cultural constructions in the rural spaces mentioned, in the distribution of unpaid caregiving duties between the women in the same familiar sphere.

- Identify the spaces from daily life where women from rural zones are being affected by the incidence of unpaid caregiving activities.

1.5 Antecedents

This section is to show the scope and findings of investigations around the topics of interest for the elaboration of this investigation, which were identified throughout a bibliographic revision. Hence, to contextualize and organize the presented study, the analysis was divided into two categories: work sexual division and women, caregiving, and rurality.

In addition, the reviewed documents allowed the delimitation of studied aspects from the Social work, Nursing, Sociology, Gerontology, and other perspectives; therefore, were used as graduation papers at the National level, taking into account the University of Costa Rica, National University, Universidad Estatal a Distancia (UNED), and other international articles, for a total of nine papers.

Per the previous statement, in the annexes section, it is detailed the aspects of interest from each investigated source, in an analysis matrix format, which allows us to know the investigated information around the subject, study object, the emptiness, and debates around the investigated topic. (see Annex #1, #2, and #3)

1.5.1 Work Sexual Division

The work sexual division is a category of vital importance for this analysis, as it is focused on the feminization of caregiving, as it allows the possibility to realize the previous inquiry about what is known about the topic.

Moreover, a valuable document is Jenice M.Vazquez Pagan's (2018) investigation, titled **“The work sexual division and the Unpaid Work at home in Puerto Rican Society: experiences on multiple working hours work”**, it began on perceptions and experiences of the participating people about the unpaid work at the home concept, on which those perspectives reflexed the work sexual division and how the time use at the house related chores, has an effect in health and work development.

In this sense, the author exposes that unpaid work since its construction implies a duty, a compulsory condition, a work linked to ordinariness and personal or familiar space, connected to women. This work is conceived as challenging, strong, difficult, and requires to be performed seven days a week, and twenty-four hours per day. Meaning, the experiences of

interviewed people within this investigation disclose “the persistency of the traditional role assigned to women as caregivers, in charge of parenting and elderly and sick people within the family, among others” (Vazques, 2018, p. 125).

This author also mentioned that the unpaid house chores and caregiving duties assignation to women are part of this social construction, which deprecates and hides the house chores of the private sphere. This reflects the social policies, which do not provide the necessary arrangements for women to harmonize the multiple roles on which they work.

Consequently, Vazquez (2018) concludes that on domestic unpaid work appropriation from the capitalist system turns into an economic violence act, an exploitation form, and it discriminates against women. To this extent, the unpaid and unshared domestic responsibilities affect ordinariness for women, influencing their work opportunities, impacting the women's decision-making, in the development of their possibilities as humans, and condemning the majority to live in poverty conditions.

Can be pointed out too, Paola Melo Morales' thesis, titled **“If Both Work, What Happen at Home: work sexual division in Households with Multiple Providers in Cali”**, took place in Colombia in 2017. The author developed a document about practices and meanings that work acquires in the workspace and home activity (domestic and caregiving work), from the inquiry about produced changes in the traditional family model and the gender equity degree that has been achieved at the work market and family nowadays.

The author highlighted that, even though women had achieved bigger participation in the work market, they still assumed the bigger charge on domestic and caregiving work, taking double or triple working hours, considering that households with two providers (man and woman) are characterized by presenting heterogeneous life conditions.

Finally, it is demonstrated that different family arrangements and strategies on which the house chores are distributed in a situation of double providers, connecting conditions plus inequalities, associated with certain factors that allow or favor a work reduction for women at home, this corresponds to: educational level, familiar life cycle, and work conditions (occupational position, incomes, hierarchy, stability, and work time).

Aside, Jose Siles Gonzalez and Carmen Solano Ruiz, give a valuable document on work sexual division in their article “Social structures, work sexual division, and methodological focus. The familiar structure and the socio-healthy function of woman” for

the Nursing magazine: Investigation and Education, published in Colombia, 2007. As the authors point out, the work sexual division as organizational typography is based on gender differences, and surpassed limitations of familiar structures, supporting that woman caregiving role, is a consequence of the familiar socialization process.

Continuing these statements, Siles and Solano (2007) present that the domestic chores distribution established for the familiar organization is, mostly, a consequence of work sexual division. Thus, in processes such as hierarchization and role distribution, women have been considered caregivers and breeders, and throughout a cultural projection mechanism, these roles have been maintained through centuries, blocking the professionalism process for women.

Besides, a meaningful contribution is Natalia Fuentes Arenas and Carolina Garces Estradas's article in Gerontology Annals Magazine, 2020; "The inequality of caregiving work: meanings and practices of main caregivers for elderly people in dependent situations", it exposed the lack of support and attention that exists in communities about elderly population in dependent situation, that had caused that caregiving has been designated to women; even if the person could need a more medical-related professional care, this lack support resources limits the access to qualified personal.

On the same line related to lack of support, the authors highlighted the low efficiency in public policy terms, which satisfactorily answered the petitions and needs of people in dependent situations and the ones in charge of their care. In this sense, the public policies are few, or depending on the focus, even inexistent, causing that all charges and needs should be paid by the families, even forcing the caregiver woman to assume triple working hours to economically sustain the household and family, the dependent adult, and herself.

Another significant contribution of these authors can be observed in the banality which analyzed the female caregiving topic in these populations, this tends to be considered a fact to assume that caregiving is done due to caring, love, and women's "maternal instinct", and not as an issue supported by work sexual and social division, which makes women vulnerable.

Another meaningful contribution is the Nursing Master Thesis titled "The Experience of Caregiving a Person with Alzheimer's Disease by a former primary caregiver", presented by Beatriz Bernal Lopez, in Mexico, in 2013. In this paper, the author highlights, by using the data from the World Health Organization (WHO), that the people group with chrono-

degenerative diseases, to the point of being declared as a pandemic, is a group that implies, a significant increase in caregivers need.

On this, she mentioned that the caregiving process in these cases is severally focused on the caregiving person, meaning that all the processes, actions, and decisions related to this work are handed by one person only, creating the possibility that there are power relationships which put in danger the person in charge, affecting their life quality and the fulfillment of their human rights.

The author also expresses that there are several weaknesses in the number of studies discussing the topic, especially the ones focused on the caregiver person, and how they continue with their life after the caregiving.

Finally, there is the study of Paola Bonavitta (2020) titled “(Invisible) Care and Bodies for others. A study of Women cases in Cordoba, Argentina”, for the *Inter.c.ambio Books* on Central America and the Caribbean of the University of Costa Rica. It ended up being a core input for this investigation, as it underlines how the patriarchal system has achieved the social and cultural naturalization of maternity and a core value associated with woman, and their biological capacity to give birth and the lack of it, denies an essential condition.

These had caused women to be subordinated to private space, where she is intended to domestic, caregiving, reproduction, nutrition, duties not socially perceived as work themselves, but that are assumed as mandatory activities for women. And “who do not fulfilled these jobs are incomplete human beings, confused, disturbed, rebels without cause in front of what they get by destiny” (Bonavitta, 2020, p, 15)

In addition, this study shows that women are a vital element in sustaining capitalism as they assume domestic chores and parenting, and elderly, and sick people caregiving for free.

On this, the caregiving feminization induces women to take double or triple working hours, in some cases without any payment, and they continue to be and give for others.

1.5.2 Women, caregiving, and rurality

The women, caregiving, and rurality category is of high value to be addressed as an analysis element that is directed to emphasize aspects related to giving visibility to women in

rurality and caregiving work; all of it performed through investigations about the common knowledge on this category.

Regarding this topic, found the Graduation Paper for Social Development Master at the National University of Costa Rica, called “The Rural Women Network: The Organizational Experience. Study of cases in Los Chiles, Upala; Siquirres; and Buenos Aires Cities”, presented by Alejandra Bonilla, 2017. This research made known that women in rural zones have strong restrictions related to decision-making processes about their bodies and lives. Moreover, it expresses that the good’s autonomy and service access are becoming increasingly limited for women, mainly.

At the same time, Bonilla (2017) signals that women's work has increased with the system crisis, which is translated into a higher control on women and their work, that it is still unpaid in many cases. The author highlights that the conditions for Costa Rican peasant women are pretty similar to the ones for other Latino-American peasant women. In that sense, the investigations show that thanks to feminism development and expansion in the region, peasant women had found organizational ways to support their own diverse social and political demands.

Another of the investigations reviewed is the Graduation Paper for the Social Work Undergraduate Degree, entitled “Progressive Care Network for Elderly’s Integral Care: Care Network Program” exposed by Virginia Bolaños, 2017. It identifies that the rural regions represent the highest poverty percentage, affecting the female gender mostly, being a priority issue for the State and civil society to develop solidarity programs.

Because of this, the investigation points out that the female work offering has increased in the country, but not all women can incorporate themselves into the work market, due to their situations such as being dependent on people's caregiving, and social conditions where the female gender assumed the responsibility on family caregiving duties and social reproduction, having as a result of the assignation of socially defined and introduced roles, impacting the work opportunities that women can have.

Finally, Bolaños (2017) states that rurality, as a historical geographic zone with limited access to basic services and rights such as education and health, has become complicated and deficient, moving populations like women and the elderly to unequal conditions; where most of the society in general is unaware of elderly rights information, and then, there is an absence of those rights’ advocacy.

To conclude, it is relevant to mention Michael Enrique Marin Rojas and Natasha Sandino Ulloa's contribution, to their thesis "Reproduction Spaces of Young Rural Population Workforce from Peasant Economy Families from Zarcero City" published in 2014, to gain a Social Work Undergraduate Degree at Costa Rican University. This study presented an investigation on young people dedicated to jobs socially considered to be "for women", like individual-care services; such as domestic workers, children, and elderly caregiver women.

Moreover, Marin and Sandino (2014) establish that the same neoliberal capitalistic system that dominates society has been in charge of hiding the double and triple working hours that women performed, mostly for those who work/live in rural areas, where parenting duties, aside of dependent caregiving, like elderly people, are considered an extension of domestic chores.

The authors also claim that there is an existing speech emphasizing that women's duties belong to the household; thus, the study shows that it is assumed that domestic work and caregiving are their responsibilities, creating a conflict when women desire to leave the private space. In that manner, there is no fair retribution for women's labor overcharge, and their real recognition for their dedication to family, hence, domestic activities are almost non-existent in men's cases.

At the same time, these labors performed by women, are useful and essential to sustain the capitalist system. Due to women doing production and reproduction work for the workforce, they are mostly unpaid. Consequently, female work is hidden while their working hours are overstuffed, taking the best benefit out of women. Then, for Marin and Sandino (2014) the extra domestic labor can represent a form of women abuse, as aside from doing domestic chores, they have double working hours, and even triple ones.

Chapter IV

Methodological Framework

This section presents the selected methodological strategy to elaborate the investigation, to be oriented to accomplish the proposed objectives. To that end, it is first exposed the perception as an investigation group about the participant population and the presented subject of study, through ontological and epistemological premises. In addition, it details the corresponding aspects of the methodological framework, participant population, selection criteria, phases and techniques on the investigation process, categories operationalization, and activities' schedule.

4.1 Oncological premises

This segment contains the oncological and epistemological premises that guide the analysis process for the subject of study; hence, we are sustained on feminism as a theoretical, ontological, and epistemological focus to understand why is this process a structural character within reality.

To start, it has to be considered that the feminization of caregiving work has a socio-historical character, which implies that the experienced reality of women in rural areas, their life conditions, and relationships, among other particularities; to are product of past historical events, and that in social dynamic had evolved and transformed into these situations and social phenomena. Under, the reality that we conceived as complex and shifting, and from the social dynamic developed at the moment, is that there are produced (and reproduced in the future) a series of links and relationships around men and women roles, and the great capital.

Because of the previous statement, nowadays reality and space, on which women converge the material and ideological conditions that reproduce the oppression on them, as economic and productive aspects are positioned as the main focus for life development; while, ideological conditions, are given through social relationships, ordinariness and social institutions, mass media, State and more; which, had installed in people consciousness that domestic is a natural and inherent attribute to women, like giving birth train them to assume caregiving and domestic labors, without taking into account other society spaces to belong to.

In this sense, it was considered that as an investigation team, the feminization for caregiving work is not conceived as an isolated situation or which cause is so superficial to be 'repaired' with a duties distribution; otherwise, on the contrary, this phenomenon is a

historical and indisputable material construction, that had impacted women ordinariness, by determined certain ways to establish subject-environment relationships, and sustained through time as a constant element in human beings relationships.

This type of logic is not always perceived, as it is noticed even in the more concrete and naturalized, as it can be experienced in everyday life; therefore, it is important to highlight that this research provides vital importance to what rural women can express, as their knowledge and experience go beyond the individual and disclose this historic and changing dynamic.

From the feminist focus, it is comprehended that gender influences the knowledge conceptions, the person who knows, and the practices to investigate, question, and justify. Identify the dominant conceptions and the attribution, acquisition, and justification practices of knowledge that systematically put a disadvantage on women.

Thus, as an investigation team, it is assumed that women as social subjects of rights, holders, and producers of knowledge can, through their experiences and perceptions, reveal a naturalized reality; which also, is hidden by economic capitalist system logic. Since, feminized caregiving is continually produced and reproduced the capital accumulation logic, and how it is exposed by the feminist focus, implies a redefinition from the female gaze, with the finality to notice the hidden structures of domination and exploitation that exist and give origin and sense to caregiving feminization, and going beyond the subject on which it is presented.

This proves the fact that they are excluded from the investigation, they are denied the possession of epistemic authority, the female styles and cognitive modes of knowledge are belittled, and theories of women as inferiors and diverted from the male model are produced. Theories of social phenomena that hide the activities and interests of women or the unequal generic power relationships are produced, and they produce scientific and technological knowledge that reinforces and reproduces the gender hierarchy.

4.2 Epistemological Focus

To be able to analyze the reality that women have had to assume family caregiving, as a totally feminized action, it is needed to take into consideration the contribution of the focus denominated as feminism. This focus allows to take experiences that women have had and the meaning that this labor implies in their lives and social spaces; transcending the

subjective with the point to reveal the structural basis, and the socio-historical elements that had given shape to the spaces that women unfold themselves and that label their ordinariness.

In addition, that focus broadly fits the feminist theory about women's participation in social relationships generated by the capitalist system; moreover, the power and exploitation dynamics entered the historical, political, economic, social, and cultural context. Therefore, it deepens into the system's dynamic, from the reality experienced by women, which differs from the men one; a needed aspect to evidence these faults and propose alternatives from the investigation process.

As exposed by Norma Blasquez (2012), feminism hugely contributes to the investigative process with this population, as this epistemological approach analyzes:

[...] addressing how gender influences knowledge conceptions, the person who knows, and the practices to investigate, question, and justify. Identifies the dominant conceptions and the attribution, acquisition, and justification practices of the knowledge; which systematically put women at a disadvantage because they are excluded from the investigation, the epistemic authority is denied to them, the styles and female cognitive modes of knowledge are belittled, theories representing women as inferiors or deviated from the male model are produced. Theories of social phenomena that hide the activities and interests of women or the unequal generic power relationships are produced, and they produce scientific and technological knowledge that reinforces and reproduces the gender hierarchy. (p.22)

The previous information proves that the feminist focus articulates the importance of prioritizing the speeches from the women's own voices and experiences, which allows both knowledge construction and the prioritization of their experiences in spaces, starting from their ordinariness, validating their work, and their importance in society, allowing them to transcend from subjective.

These aspects also match the feminist epistemology as it is oriented to knowledge production from their experiences in diverse spaces that integrate, and usually exclude women from, an inequality relationship in contrast to the theory the woman is not conceived as a cognitive subject, and then their experiences are not needed for the social investigation.

In this sense, Hartman (1996) explains that by resorting to feminism we are directing our priorities to elements in particular, such as historic and materialist methods, the

identification of patriarchy as a social and historical structure that causes women exclusion and confinement inside occidental capitalist societies' development.

For this reason, analyzing the caregiving feminization in rurality from this epistemological focus allows the comprehension of historical and structural processes that indicate the space in women's ordinariness; therefore, the claims and analysis performed, take us to multiple inequalities comprehension, that women confront in their ordinariness, product of the capitalistic system.

Due to this, when considering the key elements of feminist focus, like who benefits from women's workforce, and historical development, among some examples. This contribution is considered fundamental as it analyzes the perspectives of caregiver women, underlining the multiple elements of deployment, which converge in their ordinariness and the space on which women can unfold themselves.

At the same time, it allows the analysis from a complete perspective, of the way women settle, survive, and break those structural patterns; as when considering them, from this epistemological currency, as protagonist subjects, and holders of knowledge. Achieving the analysis of those historical elements that constrain their lives and give visibility to the hidden reality of the feminization of caregiving.

4.3 Methodological focus

The selected methodology to use in this investigation is qualitative, as based on Sandoval (1996)

[...] the qualitative approach, briefly, is not only a comprehension effort, understood not only as grasping of meaning, what one or another want to say through their words, silences, actions, and immobility through interpretation and dialogue; but also, the possibility of generations construction, who can understand the common aspects of many people and human groups in the production and social and cultural reality appropriation process, on which is developed their existence. (p. 3)

Just like that, this focus provides a series of relevant contributions, among which highlight a greater approach and deepening on topics where the study subjects and the meaning they give to the feminization of caregiving, among others. Hence, when taking into account these contributions and analyzing them from a feminist focus, is possible to go

beyond the subjectivity and show the ordinariness of caregiver women, under a structural system that determines their life conditions and everyday spaces.

Therefore, the qualitative focus allows an analysis and knowledge construction from a perspective that rural women can and want to share with the researchers. In line with this, based on Vasilachis (2006) this focus analyzes the knowledge of social actors and their practices, taking into consideration that in the field, points of view and practices are different because of different subjective perspectives and social knowledge disparities, linked to them and that are part of the context.

In this regard, for the analysts it is of great interest, and at certain point of need, that the women are the ones who give sense to the analyzed reality from a perspective that lives the issue presented, increasing not only the knowledge and analysis around the problematic; but also, the approach and improvement in the formative and participative process that both, them and us can gain through the investigation.

To conclude, the analysis of this experience which allows the qualitative focus is that will deepen on socio-historical and structural aspects, that intensified the feminization of caregiving in rural areas and validate its durability for generations.

4.4 Participant population

For this investigation, six women met the criteria of inclusion and exclusion participation; thus, elderly caregivers living in rural areas in Barranca, Puntarenas; Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela. When chosen, they provided a series of information to analyze the feminization of unpaid caregiving. The criteria for the selection are the following:

Table 1. Selection criteria for Participant population

Selection Criteria
1. Participants should, preferably, be in an age range between 18 years old and 70 years old.
2. The participant needs to be in charge of an elderly relative, as it is fundamental on women's ordinariness.
3. Women have to perform caregiving duties for at least 6 hours per day.

4. considered other key collaborators such as Social Worker professionals from the Social Security Fund (CCSS in Spanish), specifically at Barranca, Puntarenas's clinic and Angeles Norte and Piedades Norte, San Ramon's Basic Health Care Units (EBAIS in Spanish).
5. Rural areas should have the common characteristics of rural areas in our country, for example: a low amount of public and private institutions, a small population, and difficulty to access services, among others.
6. Caregiving work must be unpaid.
7. Participant women must not have another job aside from elderly caregiving.
8. Participants must live in rural areas within Barranca, Puntarenas; and Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela Cities. This delimited per the investigator's interest in obtaining data from ordinariness and space, as there is an empty investigative space in those areas.

The population who participated in this study were six women in total, that had the following characteristics:

Tabla 2. Characterization of participant population

Characteristics of population	
Susana	<p>Age: 55 years old</p> <p>Marital Status: Married</p> <p>Work situation: Unpaid domestic worker</p> <p>Educational level: School</p> <p>Caretaker person: Mother</p> <p>How many sons/daughters? 3 sons</p> <p>Years doing caregiving work: 35 years approximately</p> <p>Type of caregiving: Full-time</p>
Karen	<p>Age: 57 years old</p> <p>Marital Status: Single</p> <p>Work situation: Teacher and unpaid caregiver</p> <p>Educational level: College</p> <p>Caretaker person: Mother</p> <p>How many sons/daughters? None</p>

	<p>Years doing caregiving work: 7 years approximately</p> <p>Type of caregiving: Half-time</p>
Maria	<p>Age: 64 years old</p> <p>Marital Status: Married</p> <p>Work situation: Unpaid domestic worker</p> <p>Educational level: School</p> <p>Caretaker person: Mother previously, now husband</p> <p>How many sons/daughters? 6 children</p> <p>Years doing caregiving work: 20 years approximately</p> <p>Type of caregiving: Full-time</p>
Noelia	<p>Age: 48 years old</p> <p>Marital Status: Married</p> <p>Work situation: Unpaid domestic worker</p> <p>Educational level: College</p> <p>Caretaker person: Mother</p> <p>How many sons/daughters? 1 daughter</p> <p>Years doing caregiving work: 1 year approximately</p> <p>Type of caregiving: Half-time – Full time</p>
Tatiana	<p>Age: 62 years old</p> <p>Marital Status: Married</p> <p>Work situation: Caregiver at Community Home</p> <p>Educational level: High school</p> <p>Caretaker person: Husband</p> <p>How many sons/daughters? 2 daughters</p> <p>Years doing caregiving work: 25 years</p> <p>Type of caregiving: Full-time</p>
Lili	<p>Age: 48 years old</p> <p>Marital Status: Co-habitation</p> <p>Work situation: Secretary and caregiver</p> <p>Educational level: College</p> <p>Caretaker person: Mother</p> <p>How many sons/daughters? 1 daughter</p> <p>Years doing caregiving work: 10 years</p>

	Type of caregiving: Half-time – Full time
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Based on the provided data, the investigation's participant population was formed by 6 Costa Rican women, between 48 and 64 years old. Participants, as it was decided on the methodological framework, live in rural areas such as Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela; and Barranca, Puntarenas. It should be noted that all participants are practicing Catholics.

Six participants were in charge of elderly people caregiving either at half time or full time, within them, there were mothers of participants or their husbands and ex-husbands. In addition, 5 out of 6 participants are mothers of at least 1 child. On the other hand, 3 participants were unpaid domestic workers, while the other 3 had paid jobs such as teacher, secretary, and administration, highlighting the double working hours.

The previous allows us to consider that the caregiving work labors have not only a woman's face, but an adult one, as the participants were women older than 40 years old; even a couple are near senior age, who also, keep the caregiving work as part of their responsibilities with their relatives, independently of the affinity or strength of the ties with these family members.

Moreover, needs to be underlined the fact that they were the couple of participants who could claim to have support from their families and/or communities, describing greatly conflictive situations in matters of caregiving duties distribution and the affectations that have the work overload for them. These aspects allow us to reinforce the approach that caregiving work is still socially perceived as a women's labor, even when considered as a "solved issue" by society.

4.5 Viability

As part of the viability criterion, was needed to consider, that an investigation team, there were conducted previous investigations on the women population in past years; in addition to having family or close experiences when there was no link, related to elderly caregiving; which had a certain degree of affinity to both, subject and population.

On this matter, when making first contact with the population, was needed to consider that on occasions, reviewing a familiar dynamic, about who assumed the caregiving labor, tends to be a little uncomfortable or invasive for many people. Because of that, was

considered better to announce publicly, through personal media the objective of the investigation and plead to the population to participate, if they wanted to. Once this step is done, the proper consents from participant caregivers were obtained (or from a relative if needed); to then start the data recollection process.

4.6 Data Collection Techniques

As part of the approximation to reality for caregiving women in rural areas; was relevant to do data compilation, from 2 techniques: in-depth interview and non-participant observation; which, allow the approach to population, conduct a much more flexible process, and an articulation with the theory, to enrich the final analysis.

4.6.1 In-depth interview

Based on Taylor and Bogdan (2002) this is a technique that involves “repeated meeting face to face between investigator and informant, these meetings directed to comprehension of informants’ perspectives about their life, experiences or situations, and how they express them with their own words” (p. 101). Accordingly, this technique allows to enter the reality of ordinariness spaces for women, which opens a wide window of vital elements for the development of this research.

Through opinions, experiences, and perspectives of caregiving women in rural zones, to whom is directed this investigation has the finality to achieve the analysis on which way it is expressed feminization of caregiving in ordinariness spaces for them, and the implication that those have for them.

Moreover, this technique allows the obtention of key data to issue and comprehend the structural basis of this phenomenon, beyond the perception of a superficial speech, which makes visible the way that structural conditions proper to capitalist and patriarchal systems, restrict women’s lives.

4.6.2 Non-participant observation

The non-participant observation technique was also selected, as, per Diaz (2011) “(...) is the one on which data is collected from the outside, without intervention with the investigated social group, fact, or phenomena” (p. 8). In this sense, as investigators, the familiar dynamic of the caregiver women was disrupted, neither to perform the caregiving duties with them, nor to modify it in any way; otherwise, there was an approach to the

dynamic to understand it from a complete way, appreciate the way on which these women unfold themselves in a space much more comfortable for them, but without being part of that familiar link on which the caregiving relationship happens.

4.7 Qualitative investigation phases

This section developed the qualitative investigation phases and selected the focus to carry out the investigation itself. It contemplated a total of 7 phases, which detailed the investigation process in an organized way.

4.7.1 Topic and problem definition

This first stage of the investigation process started by organizing multiple virtual meetings, as of the COVID-19 situation, to define topics of higher interest for the investigation team and the problem, questions, and situation that needed to be analyzed.

Unanimously was decided to select the women population as the subject of analysis, due to the investigator's affinity with the population. Moreover, the research team chose to address the problem of caregiving feminization, as it is a topic rarely discussed critically in the current academic investigation; it has been investigated, but in a sort of superficial way, especially for quantitative data elaboration.

In addition, the interest to comprehend the phenomenon in rural areas arose, as they have had multiple transformations in the last decades; however, the lag in development is still present, and the government's intervention is lacking, hiding the issue in these areas, and even more for a population with a naturalized reality.

After defining the topic, the confection of this document was started, beginning with the justification and problem statement sections; on this, the investigation team consulted multiple national and international sources to expose the importance of the caregiving issue, and the investigation too, which allowed to structure the questions and objectives that guide the process.

Afterward, once objectives and questions were defined, the team proceeded to deepen directly on the topic, by searching for diverse investigations, articles, and academic documents (national and international) to elaborate the antecedents, where was compiled the aspects of higher importance about the population of interest and the problem itself. In the same way, was elaborated from them, the contextual reference, which contains information

on institutions, laws, agreements, and others, in relationship to the topic of caregiving, women as the population of interest, and the rural areas.

Finally, from the analysis, was established diverse theoretical categories, which were a starting point to the development of the caregiving topic, in a detailed way, but also, was possible to extract the necessary aspects for the instruments' elaboration for the Data recollection phase.

4.7.2 Design elaboration

This section established the investigation method, data recollection techniques, registry instruments, informants, and the selection criteria, based on what Rodriguez and others exposed. (1996)

Because of this, the investigation method was found, on which the research team selected the qualitative method to elaborate the investigation, as it is the most pertinent to answer the problem statement and the presented objectives, in order to comprehend the object of study.

Then, the characterization of the people who participated in the research, in which, was selected diverse criteria (on inclusion and exclusion) that allow the understanding of the object of study, and address the reality of women who participated in it; in addition, within the used instruments are non-participant observation and the in-depth interviews, which were adapted to the participant's context to secure a safe space for them to present their experiences.

Lastly, the registry instrument was the technique used in data collection, articulated with instruments such as field notebooks, voice recordings, and voice and video recordings. To perform each of them, a tool that worked as support during the collection process was the Zoom app, on which, 3 of the interviews were taken, as within the current context, it facilitates the communication with participants and the information's recollection. For the rest of the participants, was performed an in-person interview.

4.7.3 Data collection

At this stage was conducted the data collection through different techniques such as in-depth interviews and non-participant observation. However, to start, the technique called "snowball", on which the investigation is commented to family and friends to get orientation

to locate the subjects of study, meaning women doing caregiving labor, in communities of Barranca, Puntarenas, and San Ramon; and Puntarenas and San Ramon's Municipality.

To make contact with the participants was planned to recruit them in person, when visiting the communities, applying all the sanitary preventions needed. Moreover, because of the pandemic situation with the Sars-CoV 2 virus, which was still going on at that time, the media was also used as a communication tool to reach to rural population in Puntarenas and San Ramon, about the search for caregiver women. Then, was selected 6 of them per the established criteria for the study.

Afterward, the field entrance visits the selected women to meet them, and for them to meet the investigation team, to generate empathy and trust between them and the researchers. Therefore, the visit allows for coordination of the time, date, and place where the participants could feel comfortable doing the interviews.

Ultimately, this step was essential to perform the investigation, thus it goes hand-by-hand with data analysis, as it allowed us to determine if it was needed to incorporate more informant women, identify which topic to deepen into, and also, enable validated data obtention.

7.4.4 Data Analysis

The development of this phase gave meaning to the problem statement through the information triangulation that was obtained by fieldwork, analysis, and bibliographic revision. For this was categorized the information regarding each investigation's objective, is to visualize data in a specific and detailed manner.

4.7.5 Data Reduction

Firstly, data reduction was completed, which consists of separating and classifying n criteria and analysis topics, the obtained data. On this, a unit separation was carried out, in which the data was segmented or divided into relevant and significant units, as mentioned by Gil et al. (1994), according to the subject matter.

Secondly, a categorization was done to divide into 3 categories such as: work sexual division, ordinariness, and socio-material conditions of caregiving women. Then, group them into more specific sub-categories, allowing us to visualize the information in a detailed way, to not omit any important data that came out during the investigation.

4.7.6 Data disposition and transformation

As claimed by Gil and others (1994) this element suggested data organization, to present them in a spatial, ordered, and simplified way to present the smaller number of difficulties during the analysis process and give answers to the questions and objectives of investigations. To that end, this investigative process used matrixes and tables for certain data treatments, which were elaborated depending on the research team's need to include them, for example, variable's organization, creation of activity schedule, and characterization of participant women during the data collection phase.

4.7.7 Conclusions' obtention

Regarding study conclusions' obtention, it is needed to highlight the fact that the word "conclusion" itself, implies a finalized work, however, as stated by Gil and others (1994), it is not needed to obtain them at the end of the investigation, as certain conclusion or pointers were started to be elaborated within the investigation process, especially during the data obtention and analysis elaboration.

Taking the previous into account, has to be considered that the conclusions of this research project were continually elaborated from the analysis done by the investigation team about the information gathered in interviews, with the observation, data categorization, and others.

Aligned with that, it is of relevance to underline that as part of the information analysis, was necessary information triangulation, which was conventionally assumed as the use of multiple methods in the study of the same matter. Arias (2000) explains that it "(...) is convenient to conceive the triangulation as engaging a variety of data, investigators, and theories, as well as methodologies". (paragraph 1).

With the previous statement was identified the relevance of using triangulation from subjects, theory, and sources, as they allow to give meaning to the problem statement, as well as the construction of new knowledge and comprehension of life experiences of the caregiving women participating in this study.

4.7.8 Investigation's validity

In this part of the process, it is necessary to guarantee the relevance, usefulness, and validity of this investigation, to determine the range and contributions to the social issue

studied; thus, it was ensured that during the whole process, from topic selection and design elaboration, scientific rigor was constructed, based on academic advice and reviews, and the use and reviews of official databases.

Moreover, part of this validity includes the approval of the investigation design by the Scientific and Ethical Committee of the University of Costa Rica, the application of informed consent for the obtained information during the fieldwork, securing the information gathered through interviews, and other aspects.

4.7.9 Paper presentation

In this phase was obtained the final investigation document and the final exposition which detailed as much as possible of the investigative process, including scheduling, annexes, evidence, applied instruments, recommendations, and conclusions, as well as the corrections that will be highlighted for the public Dissertation in front of the examiner a tribunal at the West Branch.

4.7.10 Results' devolution

As part of the commitment with the participant women population during the investigation, there was a need to eventually perform a face-to-face meeting to explain the results and findings gathered within the investigation.

Nevertheless, due to the limited time of the investigation's participants, the face-to-face meeting did not happen, even though, there was the possibility to explain individually to each participant, the study results, if they requested them.

4.8 Limitations and Challenges

During the elaboration process of this investigation, as expected, there were different situations and events external to the research team and their advisory team's control, which motivated the creation of alternative actions and creative teamwork.

Starting on the elaboration of the investigation design, this represented a distant relationship between the investigation team and the Bachelor's Degree Final Project Commission for Social Work University Program, as there was a high disregard for the investigation proposals, causing difficulty in clarifying the process phases, emergent doubts, academic products delivery, and other aspects.

Every investigation project has a series of steps to follow, previously explained, to concrete the conclusion of it; the writing of these steps can be flexible, thus, during the process, ideas can change, improve, and even be omitted. However, starting the investigation, writing the justification, objectives, and investigation questions, to then start the fieldwork stage, discovering that the main issue defined from the beginning, was not the proper problem for the participant women, causing the necessity to return to previous stages and adjust, all for this specific study.

On another hand, the fieldwork has its own difficulties and obstacles, starting with the fact that was initially established to interview 10 caregiver women; however, when contacting the women who could participate in this project, a barrier was the fear socially generated by the Social Work University Program.

Meaning, that the challenge was to make them comprehend that this investigation neither was going to represent any disadvantage or affectation to them nor imply that they were going to be reported to state institutions or entities, after their participation. To these, many women considered as possible participants retracted and rather not participate. Aside from the limited time that, on some occasions, the women reached out and the advisory team's schedule did not match, causing them could not be part of the research.

Therefore, in the beginning, it was meant to contact women only dedicated to caregiving work, taking into account that, on some occasions, there are women who cannot commit to other activities, even when collaborating with other caregivers. Nevertheless, given the lack of possible volunteers for the investigation, it was decided to broaden the search and include women who develop themselves in other spaces aside from caregiving, including the paid ones, an aspect which allowed to meet the population's goal proposed on the design stage.

In addition, as the interviews took place in different geographic spaces (San Ramon, Alajuela, and Barranca, Puntarenas), it was initially planned that all interviews would have the participation of the full investigation team. Despite, because of the road tragedy on the route known as "Cambroner" in September 2022, which resulted in multiple deaths; it was impossible for some investigators, who live in San Ramon, to get to the interview spaces; thus, it needed to resort to alternative means to carry out the process, such as video call interviews and WhatsApp messaging.

Aligned with the previous statement, another aspect that represented a challenge for the investigation team, was to generate a full trust environment and zero personal judgment spaces for the interviewed women. For some of them, allowing an external person to enter their homes was a challenge, which is respectable and understandable, and even though there were no difficulties in finalizing the interviews, some participants expressed their fear about the statements made, explaining that they “are afraid to say something for which they could be criminally denounced”.

On this, it was reinforced the clarification that the Informed Consent, which clarified the protection of their identities and their right to leave the investigation whenever they want, without any retaliation, as the main focus of this investigation was to generate knowledge.

Finally, there was a lack of private spaces to interview, as most of the women were primary caregivers, which caused during the interview process, the people they oversaw had to be near them, and limited their responses, resulting in occasion these people participating in the interview. Moreover, this also limited the mobility to go out of home, as they had to keep their caregiving duties.

4.9 Schedule

Table 3. Activities schedule

Investigation design phases	Academic year				
	I Academic year 2021	II Academic year 2021	I Academic year 2022	II Academic year 2022	I Academic year 2023
Problem reflection and statement					
Design elaboration phase					
Field entrance phase					

Data collection phase					
Data analysis phase					
Investigation validity phase					
Paper presentation phase					
Dissertation phase					

4.10 Operationalization of study categories

Table 4. Study categories

Category	Subcategory	Information's origin
Work sexual division	Caregiving work: Distribution of reproduction work Unpaid work Paid work Caregiving economy Domestic duties Multiple working hour periods Woman exploitation Consequences of work overload Reproduction and caregiving	Non-participant observation In-depth interview

	Familiar dynamic Saturation of caregiving work	
Ordinariness	Social identity Learnings Language Historical context Habits and traditions Culture Spatial-temporal location Experiences Believes	Non-participant observation In-depth interview
Socio-material conditions for caregiver women	Social, cultural, economic, and political conditions: Inequality Poverty Consanguinity Unsatisfied requests Lack of opportunities Complicated access to basic services Precarious basic services Rights violation Poor political intervention Government abandonment Education	Non-participant observation In-depth interview

Chapter VI

Conclusions and Recommendations

6.1 Conclusions

From this study's elaboration, was demonstrated through the voices of elderly unpaid caregiver women, that the feminization of caregiving work is a reality still happening in Costa Rica. By analyzing social and cultural aspects was possible for the investigation team to claim that the topic of caregiving work being a feminized task nowadays is multi-causal; hence, it is needed to comprehend that there is not a single cause or element that reproduces it in a unique way as part of society, then, it is possible to reach this phenomenon, by analyzing a variety of aspects or causes linked together. Consequently, the analyzed elements during the investigation process are not absolute, they can be different depending on the investigation focus given to the study of this issue.

6.1.1 About Sexual Division of Unpaid Caregiving Work

The feminization of caregiving work has a structural base that belongs to work sexual division, that establishes gender roles, limiting women to a private space where they must assume domestic, reproduction, and of course, caregiving duties.

From the socio-historical and materialistic perspective is understood that the feminization of caregiving work was interiorized by the economic capitalist system dominant in society, simultaneously with work sexual division. As it is naturalized the roles' reproduction and gender responsibilities do not consider caregiving work as work itself, but as an extension of women's responsibilities that generate greater gain for the system, as it is unpaid and at the same time, guarantees workforce reproduction inserted in the labor market.

The main justification to feminize the caregiving labor is a biological aspect, as it is considered that women were born with a maternal instinct, affection, and love that make them take care of family or relatives that need support, in an unpaid way. Consequently, they have been led to believe from patriarchal socialization processes, that caregiving is an aspiration for them as women, and that performing this task gives them social value.

These roles are legitimized by the State, and reproduced by institutions such as the Church, schools, private and public sectors, and families, which delimit the development of equal social relationships, between men and women, either in the private or public sector.

Based on the previous statement, society's diverse control mechanisms, through which it tries to shape specific behaviors on the part of inhabitants, establish the reasons to "justify" why women should be in charge of caregiving and domestic duties; ideals that are accepted and recognize positively, provoking naturalization in the population, and especially women, about these activities. In this continuous naturalization process, women are influenced by these ideals in peer groups, institutions, media, legal media, religion, the State, art, and several other actors that end up reinforcing the idea that caregiving is a woman's task, constantly based on gender roles.

These gender roles, seen as social mandates, continue to be very present in current society, even when the women's rights movements and fights have been present advancements of great importance for female systematic liberation, and rights' acquisition in diverse aspects. To generate consciousness and social intervention on the importance of women who dedicate themselves daily to caregiving work, is probably, one of the most important challenges that are still present in these fights, especially in a society that is engaged, making use of all means, to seclude women to the private space. For women, even in 2023, to have a husband, sons, and daughters, and dedicate themselves totally and without interest to them, is still an aspiration to which women are raised and educated, or when they do not fulfill this duty, they are judged, criticize, and even isolated.

6.1.2 About women as unpaid caregiver

An aspect to highlight on the previous is that all the related to caregiving turns out to be a topic on which people are little educated, but that society considers women to know by nature. Women who participated in this investigation were revealed to have been hardly prepared to assume a process such as caregiving, at least in a matter of knowledge; as this has been evolving around the experience acquired and the primary and secondary support networks that were involved in their proper processes.

Another element to underline is precisely the importance that women give to religious beliefs within a dedication to caregiving work context. Many of these women consider that their faith, their spirituality are another tool that allows them to carry out the caregiver task; meaning, they consider faith as a protection factor when facing diverse stressful situations that are produced during the caregiving process, generating an experience of bigger sense for them, even though, it is not less exhausting.

Regarding the above, to have a religious belief is a right of every person, and they should not underestimate this; however, this resulted in special interest in how society and powerful groups, had taken advantage of these beliefs to reproduce social and behavioral ideas in the general population, either you have those beliefs or not. The use of elements such as morality plays an important role in religion, and also, in many women's and men's lives; those who exercise those beliefs, as activities like caregiving work acquire an emotional dimension for those who perform this task.

Nevertheless, for women, it goes beyond an emotional aspect, as they perform the caregiving work as an extension of the naturalness, as "a blessing" to which they were supposedly selected to dedicate; and this can be considered a pure intention, if we forget to mention the many consequences in the family unit and the rejection they are subjected, by family and other, when they decided not to perform this duty. This is why it should be questioned, on both an individual and ordinariness level and future investigation. If society can continue to keep this lie dedicated to caregiving is always voluntary and it does not have negative aspects as itself.

It must be of special attention to reflect about the environments where the caregiver person can be a victim of gender violence, as it is an undeniable reality and is increasing due to the recent pandemic situation for COVID-19; in which, a great number of women had to take double or triple working hours within the private space, even when they could be victims of different forms of violence. In this sense, it resulted in particular interest in how society set aside the violence and safe spaces topics, when this person performed caregiving work under emotional and religious manipulation, a situation that must not be tolerated and even less, hidden.

6.1.3 About the contradiction in unpaid caregiving work

On the other hand, from a rural context must be highlighted the fact that the family dynamic, how it is constructed, and how the links between the family unit, indisputably impact how women in charge of caregiving work, perform and recognize it itself. It was never the idea to underline that there are "good" or "bad" families; however, it was interesting to discover that women with stable and present support networks, had a better relationship with their duty as caregivers woman, and also, with the effects and burnout that these work causes; compare to the ones with a conflictive or absent support network. As a result, many women end up relying on community or state support networks, when available.

Moreover, it was concluded that the statal investment in caregiving work in rural areas is scarce in the country. As time goes by, there is a state regression, and the rural sector lacks more and more intervention, increasing the issue over the years as the number of elderly people in the country is rising, and regarding family, as a result, more women got assigned this labor.

By the previous, there is an urge to develop intervention proposals in the country, which fairly divide the experiences for people constantly dedicated to caregiving work, thus, these strategies are aligned with the challenges and difficulties encountered in spaces more concrete and immediate of ordinariness; such as exhaustion, lack of access to information about caregiving, future expectations after caregiving work, emotional health, family conflicts, to mention a few.

The caregiving work is an issue that is evidently precarious, and each day generates work that is assigned to women as it is another home activity when truly, this is a job that requires dedication, time, effort, money, and more; hence, there must be open discussion spaces in which gender equity predominates, a visibility of needs in rural areas, and not the patriarchal and urbanist culture that has dominated for several years.

6.2 Recommendations

As a result of the experience gained through the investigation process, which was nurtured by the participants' voices, allowing the research team to deepen an issue that has been hidden, and reinforce the aspects discussed in the conclusions; a set of recommendations was created to inspire and guide future investigators, contributions to Social Work University Program, and community actors, among others.

6.2.1 To Local Governments and community actors

- To facilitate training spaces, taught by professionals in Nursing, Psychology, and Social Work, for elderly caregivers people, where is taken into account the different case types that exist in caregiving, with the idea of providing useful tools and techniques to perform the caregiving work, as the great majority has misinformation.
- It is recommended to make institutional and political management for the creation of professional opportunities in the caregiving field, especially for

professionals in Psychology and Social Work, all within health services and local entities such as the Municipality.

- Create awareness about the feminization of caregiving work, as it is a phenomenon socially hidden, but that affects more of the families in this country; thus, it must be addressed at the state level, to provide tools to carry out such great labor as it is caregiving.
- Prioritize the needs of caregiver women in rural regions, in matters of social policies at the country level, and not only from local governments.

6.2.2 Future Investigation Process

- From the experiences as researchers, the student population is urged to investigate the particularities of rural areas and to develop projects that show the ordinariness that is born there, in order to facilitate the knowledge's construction in a little-investigated field within the social work discipline.
- To study how social politics is segmented and does not evidence of the needs and interests of rural women and the particularities lived by them in solitude.
- It is recommended to put attention to and construct investigation proposals that cover the gender violence topic, within the caregiving work dynamic, as it is an emergent reality during the process, that definitely deserves multiple investigation efforts.
- To facilitate socio-educational processes with caregiving women, through the construction of support, knowledge, accompaniment, and timely communication networks, to make women feel secure to share their experiences, and have empathy with other women living a similar reality; as the great majority had a lack of support. This kind of support network can be guided by students in advanced levels of Social Work and Psychology, who are in the process of completing their professional practice.
- To study the rural ordinariness, the needs, interests, and social representations that exist in the socialization processes, to comprehend what the rural side also knows.

6.2.3 To Social Work Education, at the Western Branch

- To promote the students of the University Program, especially those with affinity with the social and feminist fight, to deepen into the issue and social

phenomenon naturalized and little explored nowadays; because, although the feminist movement has advanced great steps and with multiple topics, the caregiving work has lagged in current research.

- To reinforce during the third year of University Program the approach that students have with communities, within and after the professional practice in that year; because the investigation topic that can surge these spaces, can enrich the professional training, and also, allow to create future ways of interventions based on the latent needs of the communities, as it happened within the confection of this current investigation project.
- To the professors who are part of the advisory teams for students in the investigation process, are urged to, respectfully, do all the possible means to balance the amount of Graduation Final Project that they assumed for revision or supervision, as the labor overload harm also the students, who work, in many occasions, with little or null supervision during the process.

6.2.4 To women dedicated to unpaid caregiving work

- To construct networks at the community level, when the family ones do not exist or are unstable, to generate support to the caregiver women, and others on the same condition as unpaid caregivers.
- To check with institutions and entities about training processes for caregiving work, taking into account that many women assumed these processes without experience or with limited knowledge, generating doubts, helplessness, and fear. Should be recalled that even though society considers caregiving work as something that comes naturally to women, it is not necessarily a reality, thus, the search for training opportunities is valid and needed.
- To approach the proper institutions when the family consensus around who and how must assume the caregiving responsibilities, turns conflictive or does not exist. This considering that many women, including some participants, presented a work overload due to them being the only ones assuming this responsibility; even though, there are more relatives capable of collaboration. This recommendation is made consciously about the rights of both, the caregiver person and the caretaker person too.

CHAPTER V

Data Analysis

This chapter consists of the different explanations and justifications behind the translation decisions within Chapter IV; also, with the support of the information taken from Chapter III. In addition, the different instruments applied within the analysis of the translated text are explained and detailed in a section of this chapter, specifically for text analysis, color coding, and the two specialized glossaries created within this paper. Moreover, for each instrument is explained the logic and analysis behind its application and the decision of what to include within it.

5.1 Analysis and interpretation of the results

In this section, the investigator explained in detail the analysis behind the text's translations in Chapter IV, such as text analysis, translation procedures, and glossaries; all using the information gathered and described on Chapter III. This explanation incorporates details on the translation decisions and procedures applied in multiple selected paragraphs using the color coding created in Chapter III. Therefore, the terminology and criteria selection for the specialized glossaries are included with detailed information.

5.1.1 Text Analysis

The first instrument used for data collection and description within Chapter III is the Text Analysis table, in which the main characteristics of both source texts are presented, and allows the researcher to align the target texts to meet the proper author's purpose, audience, message, etc. The table incorporates information on the text style, the three stylistic scales (formality, difficulty or generality, and emotional tone), the text function, and the translation method applied for each paper.

Table 5. Text Analysis: Documents Translated from English to Spanish, and from Spanish to English

	The Race in the workplace: The frontline experience	La feminización del cuidado no remunerado
Text Style	Descriptive/ discusión	Descriptive

Scale of formality	Neutral	Formal
Scale of Generality or Difficulty	Neutral	Neutral
Scale of Emotional Tone	Intense	Intense
Text Function	Vocative	Vocative
Translation Method	Communicative	Communicative

Table 5. Demonstrate how the text analysis will be executed for the translated documents.

Source: Researcher's own creation

In the case of text style, both texts have a descriptive tone, as the papers include and are mostly focused on concepts and descriptions within the whole text; however, in the case of “The Race in the workplace: The frontline experience”, this document does include several quotes from the interviews realized on the data collection of that research; all this quotes were used to sustain and exchange different thoughts presented by the authors of the paper. Then, in the case of the scale of formality, “The Race in the workplace: The frontline experience” has a neutral formality as it held no intention or emotion from the authors, rather just informing on a situation happening in the US workforce market. On the other hand, “La feminización del cuidado no remunerado” does have an intention within the text, and it shows a certain high level of the terminology used within the text, thus, the scale of formality for it is formal.

Following with the scale of difficulty or generality, in both source documents the complexity of the text can be considered to be neutral as it does contain a variety of terminologies that hold a level of complexity, most of the information can be understood and have commonly used terms. Moving on to the scale of emotional tone, both presented intensifiers to accentuate a specific point of view, element, or characteristic discussed within the papers; while, “The Race in the workplace: The frontline experience” used them to emphasize disparity in payment or benefits for people of color in the US versus Caucasian people; in the case of “La feminización del cuidado no remunerado” document, the authors used different words to highlight terms such as caregiving duties, feminism, unpaid working hours, etc.

Then, in matters of text function, both documents have the intention to deliver a message to the audience; even though it is mostly based on informing the population about the problem, they do provide guidance for the readers to follow a stance or various possibilities to amend it. Finally, in terms of translation method, as both papers have an intention to foment or create a stance for the readers to take, the method selected for the translation was communicative, which is focused and emphasized on connecting the audience with the message and intention, rather than staying the most loyal to the source text terminology.

5.1.2 Color Coding

The second instrument used for data collection within the analysis process is the color coding chart. To show and exemplify the analysis behind the translation techniques or procedures applied, the investigator chooses fifteen paragraphs from each of the target documents and applies the color coding created within the Theoretical Framework (Chapter III): transposition in **blue**, modulation in **green**, omission in **yellow**, amplification in **pink**, explicitation in **cyan**, literal translation in **orange**, and punctuation change in **dark red**.

Table 6. Color Coding Chart

Translation Technique or Procedure	Color assigned
Transposition	Blue
Modulation	Green
Omission	Yellow
Amplification	Pink
Explicitation	Cyan
Literal Translation	Orange
Punctuation Changes	Dark Red

Table 2. Demonstrate each of the color assigned per technique.

Source: Researcher's own creation.

5.1.2.1 Color Coding of "The Race in the workplace: The frontline experience" text, translated from English to Spanish

Paragraph 1

This report is based on research conducted in collaboration with **Walmart**, the **W.K. Kellogg Foundation**, **PolicyLink**, the **People & Organizational Performance Practice at McKinsey**, and the **McKinsey Institute for Black Economic Mobility**. We thank Donna Morris, Ben-Saba Hasan, Kathleen McLaughlin, Jay Porter, Lorraine Stomski, Amy Goldfinger, Russell Shaffer, Melissa Hill, Jami Lamontagne, Marty Autrey, Heather Haberer, Amrit Sagar Mohapatra, and Cher Evans from **Walmart**; Jonathan Njus, Erin Currier, Debbie Green, and Rebecca Noricks from the **W.K. Kellogg Foundation**; Jocelyn Corbett, Josh Kirschenbaum, and Mahlet Getachew from **PolicyLink**; and Shelley Stewart, Ammanuel Zegeye, Duwain Pinder, and JP Julien, the leaders and **core team** from the **McKinsey Institute for Black Economic Mobility**.

Este reporte está basado en una investigación conducida en colaboración con **Walmart**, la **Fundación Kellogg**, **PolicyLink**, el departamento de *People & Organizational Performance Practice* de **McKinsey** y el departamento *McKinsey Institute for Black Economic Mobility*. Agradecemos a Donna Morris, Ben-Saba Hasan, Kathleen McLaughlin, Jay Porter, Lorraine Stomski, Amy Goldfinger, Russell Shaffer, Melissa Hill, Jami Lamontagne, Marty Autrey, Heather Haberer, Amrit Sagar Mohapatra y Cher Evans de **Walmart**; a Jonathan Njus, Erin Currier, Debbie Green y Rebecca Noricks de la **Fundación Kellogg**; a Jocelyn Corbett, Josh Kirschenbaum y Mahlet Getachew de **PolicyLink**; y a Shelley Stewart, Ammanuel Zegeye, Duwain Pinder y JP Julien, los líderes y **equipo central** de “**McKinsey Institute for Black Economic Mobility**”.

Analysis behind

The paragraph selected has multiple company names within it, which allowed to investigate and recognize the proper names for those companies in the other language, in this case, Spanish. After research on parallel texts within McKinsey and other consulting companies such as Boston Scientific and Delloite; together with tools such as Linguee, ProZ, and Google, the “proper name” for the different companies and departments was determined for this paragraph. In addition, in the case of McKinsey internal departments, after deep research, within the firm these departments are referred to with the same name in English, even in other languages (found for documents in Spanish and German). Moreover, in terms of the translation procedure applied, the literal translation was the most used as most of the text includes names, which do not need to be translated or modified from one language to another.

Then, for the transposition technique, which consists of modifying terms or phrases to meet the lexical and syntactical structure difference from one language to another (English to Spanish in this case). Aside, in terms of omission procedure, as in Spanish the subject in some sentences is implicit, it can be omitted when translating it from English. Therefore, for the amplification technique, in Spanish, there is a need to add articles to define or delimit the number and gender of a noun, which is not needed in multiple cases for English. Finally, there are no examples of modulation (change in perspective to avoid awkwardness), explicitation (add a word or term to make understandable the idea), or punctuation changes.

Paragraph 2

The vast majority of Americans are introduced to the **workforce** through **frontline jobs**—whether waiting tables, **stocking store shelves**, or folding clothes. Today, approximately 70 percent of the **US workforce** is concentrated in **frontline jobs**.² However, there is an **ambition gap**: 70 percent of workers want **to** advance, but just **one in four** will.

²McKinsey Analysis based on Bureau of Labor Statistics, 2019 data.

La gran mayoría de los estadounidenses son introducidos a la fuerza laboral por medio de los trabajos de primera línea, ya sea camareros, abasteciendo estanterías o doblando ropa. Hoy, aproximadamente un 70 por ciento de la fuerza laboral de Estados Unidos está concentrada en los puestos de primera línea²; sin embargo, hay una brecha de ambición: 70 por ciento de los trabajadores quieren avanzar, pero solo 1 de cada 4 podrá.

²Análisis de McKinsey basado en la Oficina de Estadísticas Laborales, información del 2019.

Analysis behind

In this second paragraph, as noticed from color coding, the technique most used within it is a literal translation, as most of the structure, ideas, coherence, and message from the original text, can be transferred from one language to another. Then, the transposition procedure is the second most used as in a syntactical perspective, Spanish has a different structure order than English; in English, the basic structure is adjective + noun, and in Spanish, the basic structure is noun + adjective. Moreover, there is one case of modulation as to follow parallelism, numbers should be in the same format within the whole text, which in this source text was the digits itself; thus, when translating the phrase “one in four”, it was changed to digits as “1 de cada 4”. In the case of omission and amplification techniques, there

are a couple of examples based on the language structure needed, as for English, the infinitive verbs need the particle “to”, which is not needed in Spanish, as the verb form is defined within the verb conjugation. Then, in Spanish, as part of the language structure articles need to be added before the nouns to define their number or gender. For punctuation changes and explicitation there are no examples within this paragraph.

Paragraph 3

Too often, **frontline jobs** are both a starting point and an end **point** for workers. The majority of **frontline workers** never move **up** the ladder: just 4 percent are promoted to **entry-level corporate jobs**.³ Instead, they cycle through a series of positions that represent **lateral moves** **without** ever gaining the **necessary skills** or having **the opportunity** to advance. Workers of color are particularly likely to remain in **frontline jobs**.

³ McKinsey, *Race in the Workplace 2022 Talent Pipeline analysis*; 51 participating companies, four million employees.

A menudo, los puestos de primera línea son ambos, un punto de inicio y finalización para los trabajadores. La mayoría de los empleados de la primera línea nunca suben la escalera corporativa: solo un 4 por ciento son promovidos a un trabajo de nivel inicial corporativo³. En su lugar, ellos rotan en una serie de posiciones que representan movimientos laterales, nunca ganando las habilidades necesarias o teniendo las oportunidades de avanzar. Los trabajadores de color son especialmente propensos a mantenerse en los puestos de primera línea.

³ McKinsey, análisis de la Red de Talentos de *Raza en el espacio laboral 2022*, 51 compañías participantes, 4 millones de empleados.

Analysis behind

For the third paragraph analyzed, literal translation is once more the most applied technique within the translation process, as the source language and target language have multiple similarities in their structure as both languages come from Latin. Moving on to the next procedure, transposition has multiple examples to meet the sentence or phrase structure changes from English to Spanish. In addition, for the omission, in the case of “starting point and an end point”, as in Spanish will be redundant to add “point” for both cases, it was coherent to only translate it to “punto de inicio y finalización”. Then, for “move up” and “without ever”, in Spanish, there are specific words that can portray the meaning from these compound words or terms, such as “subir” and “nunca”. For amplification, as mentioned

before, in Spanish is needed to use articles to delimit and define the proper number or gender for a noun.

In terms of modulation procedure, there are two examples of its application, as for “the opportunity”, the number was modified in Spanish to meet the subject within the sentence that was “they”, meaning that the number needed to be plural, instead of singular. For the second example with “four” and “4” it was a matter of parallelism within the target text as the first use of numbers on the source document was with digits instead of words, this format needs to be kept within the whole Spanish document. Then, for explicitation and punctuation change there are no examples within this paragraph analyzed.

Paragraph 4

Workers of color, who are overrepresented in the **US frontline workforce**, feel these **challenges more acutely** than their **White** counterparts. At many companies, **frontline roles** are a **revolving door** with **low pay** and little advancement, leaving workers of color without a path to **move up the ladder**. As a result, more employees of color are in roles with **lower job quality** (for example, jobs **that** lack **healthcare benefits** or don't pay a **living wage**⁴). They have less confidence that their organization will **be** fair and transparent, are less likely to **have sponsors to help** guide their career, and have less access to opportunities to advance. The prevalence of bias in the **workplace frequently leaves workers of color feeling** isolated and at a disadvantage.

⁴ Marcela Escobar, “6 **job quality metrics** every company should know,” Brookings Institution, October 27, 2021.

Trabajadores de color, quienes son sobre representados en el personal de primera línea de los Estados Unidos, sienten con más profundidad estas dificultades que sus contrapartes caucásicas. En muchas compañías, los roles de primera línea son un círculo vicioso con salarios bajos y escasas promociones, dejando a los trabajadores de color sin un camino para escalar a la cima. Como resultado, más empleados de color están en puestos con baja calidad laboral (por ejemplo: trabajos sin beneficios sanitarios o no pagan un salario digno⁴). Tienen menos confianza en que su organización será justa y transparente, son menos propensos a recibir patrocinio para ser guiados en su carrera, y tienen menos acceso a oportunidades de promoción. La prevalencia de prejuicios en el ambiente laboral deja a los trabajadores de color sintiéndose frecuentemente apartados y en desventaja.

⁴ Marcela Escobar, “6 **métricas de calidad** que toda compañía debería saber.” Institución Brookings, 27 de octubre del 2021.

Analysis behind

In this paragraph, there are more examples of transposition and modulation techniques, mainly due to structural differences between English and Spanish languages. For specific cases, “White” is a term that can be contemptuous to be translated as “blancos”, thus, after investigation within tools such as Linguee and ProZ, the proper term to use will be “caucásicos”. This investigation process was also applied for terminology such as “revolving door”, “move up the ladder”, and “sponsors”; which also required research within parallel texts in McKinsey and other consulting companies discussing the same topic; after reviewing these tools and publications, the translations found to be the most coherent, natural, and meeting the different scales in the original text were “círculo vicioso”, “escalar a la cima”, and “patrocinio” respectively. Aside from these, literal translation, omission, and amplification techniques were applied as mentioned in the previous paragraph’s analysis. On explicitation and punctuation changes there are no examples in this specific paragraph.

Paragraph 5

As past McKinsey reports have detailed, workers at all levels endure challenges on the job, and this is particularly true for people of color.¹⁰ Yet our research found employees in frontline roles report the worst experience. Frontline hourly employees are nearly 20 percent less likely than corporate employees to believe that DEI policies are effective (Exhibit 2). Just one-third of workers in the bottom 10 percent of income had jobs with paid sick leave.¹¹ In addition, 45 percent of hourly employees don’t believe their company encourages them to take advantage of work–life policies (for example, leave of absence and parental leave) without jeopardizing their employment or career advancement.

¹⁰ “Race in the workplace,” February 21, 2021.

¹¹ “Employee benefits in the United States,” Bureau of Labor Statistics, March 2019.

Así como ha sido detallado en pasados informes de McKinsey, empleados de todos los niveles enfrentan desafíos en el trabajo, y esto es particularmente verdadero para las personas de color¹⁰. Sin embargo, nuestra investigación halló que los trabajadores de primera línea reportan la peor experiencia. Los empleados de primera línea pagados por hora son cerca de un 20 por ciento menos propensos que los empleados corporativos a creer en la efectividad de las políticas de DEI (Gráfica 2). Solo un tercio de los trabajadores del 10 por ciento del límite inferior en ingresos, poseen empleos con licencia remunerada por enfermedad¹¹. Además, un 45 por ciento de los empleados pagados por hora no creen que su compañía los aliente a aprovechar los beneficios de las políticas de conciliación de vida

laboral y familiar (por ejemplo: permisos para ausentarse y licencia de maternidad o paternidad) sin arriesgar su empleo o su desarrollo profesional.

¹⁰“Raza en el espacio laboral,” 21 de febrero del 2021.

¹¹“Prestaciones laborales en los Estados Unidos” Oficina de Estadísticas Laborales, marzo del 2019.

Analysis behind

Moving on to a new paragraph, literal translation, transposition, and amplification procedures were applied and analyzed as explained in previous paragraphs; however, there are different examples for modulation and explicitation. On one hand, for modulation, for the first phrase of the paragraph, the sentence was changed from active voice to passive voice to accomplish more naturality and relevance to the direct object, rather than the subject of the sentence. For the other two examples, the changes were determined after reviewing parallel texts within McKinsey, Boston Scientific, and Deloitte; together with tools like Linguee and ProZ. On the other hand, for explicitation, in Spanish was needed to add “beneficios” to provide clarity on the subject, as it was implicit in English, but needed in Spanish; then, for “parental leave” even though in English it implies that parental means father and mother, in Spanish, there is no word to refer to “parental” thus, “maternidad o paternidad” is needed to specify for the context. Finally, there are no examples of omission and punctuation changes in this paragraph.

Paragraph 6

Frontline hourly workers report a pervasive lack of fairness in promotions

An organization’s commitment to transparent performance reviews and promotions is critical to instill a sense of fairness among the workforce.¹² Our research explored the perceptions of frontline hourly employees regarding fairness and transparency in promotions. They are more likely than their salaried peers to feel their organization is inconsistent when it comes to promoting employees on merit and performance (Exhibit 3). Just 39 percent of hourly respondents believe their employer takes an objective, empirical view of performance and promotion. This lack of fairness underscores that investments in frontline workers have been ineffective and insufficient to date.

² Bryan Hancock, Elizabeth Hioe, and Bill Schaninger, “The fairness factor in performance management,” McKinsey Quarterly, April 5, 2018

Trabajadores de primera línea pagados por hora reportan una falta general de equidad en los ascensos

El compromiso de una organización en tener revisiones de desempeño y ascensos transparentes es crítico para instaurar un sentido de equidad entre la fuerza laboral¹². Nuestra investigación exploró las percepciones de los empleados de la primera línea pagados por hora con respecto a la equidad y transparencia en los ascensos. Ellos son más propensos que sus compañeros asalariados, a sentir que su organización es inconsistente cuando se trata de ascender empleados basados en mérito y desempeño (Gráfica 3). Solo un 39 por ciento de los entrevistados pagados por hora creen que sus empleadores tienen una visión imparcial y empírica del desempeño y ascenso. Esta falta de equidad destaca que las inversiones en los trabajadores de primera línea han sido inefectivos e insuficientes a la fecha.

¹²Bryan Hancock, Elizabeth Hioe y Bill Schaninger, “El factor equidad en el manejo de desempeño,” Informe Trimestral de McKinsey, 5 de abril del 2018.

Analysis behind

To keep parallelism within all documents, the word “promotions” was previously translated as “ascensos”, thus, to keep coherence and logic same word was used, even though “promoción” also is a proper translation for “promotion”. Then, in the case of “An organization’s commitment” translated as “El compromiso de una organización”, there is a difference between the article used, as the “common” translation will be “Un compromiso de una organización”; however, when taking into account the rest of the sentence of the source text, if the article is translated as “un” the sentence lacks sense and coherence on the message. In addition, there are examples of literal translation, transposition, and amplification, as previously explained. And for omission and punctuation changes, there are no specific applications in this paragraph.

Paragraph 7

“When I first got hired, they said that there are opportunities to move up, but there hasn’t been a whole lot of support. They kind of pick and choose who they want to be the next manager, who they want to promote, depending on how they feel about you. I guess some of it has to do with performance, but mostly, it seems to be somewhat related to favoritism.” 23-year-old Black man, tour guide

“Cuando me contrataron por primera vez, ellos decían que había oportunidades para ascender, pero no ha habido mucho apoyo. Ellos como que escogen a quién quieren que sea

el próximo gerente, quién quieren que sea promovido, dependiendo de cómo se sienten sobre ti. Supongo que tiene un poco que ver con el desempeño, pero mayormente, parece estar algo relacionado con favoritismo.” Hombre afroamericano de 23 años, guía turístico.

Analysis behind

For the seventh paragraph analyzed, there are multiple omission procedure examples, such as “pick and choose” as in Spanish these are synonyms, and it is redundant to translate both words. Aside, the pronouns to indicate the subject or the particle “to” for infinitive verbs, are not needed in Spanish, as the pronoun can be identified or delimited on the verb conjugation, the same implied for infinitive verbs. Moreover, for modulation examples “Black man” was translated as “hombre afroamericano” as the term “hombre negro” can be considered offensive in multiple contexts, and as the audience for the target document is Spanish speakers in the United States, it was selected the term “afroamericano”. In the case of literal translation and amplification, the translator’s decisions were based on language structure syntax, and message coherence. For explicitation and punctuation changes, there are no examples within the paragraph analyzed.

Paragraph 8

Asian workers: A tale of divergent experiences

Fast facts¹

5 percent of frontline workforce Top industries: accommodation and foodservice, manufacturing, and healthcare

¹ Bureau of Labor Statistics (OES and QCEW); Moody’s Analytics; American Community Survey, 2019.

Trabajadores Asiáticos: una historia de experiencias divergentes

Datos rápidos¹

Un 5 por ciento de las industrias líderes de los trabajadores de primera línea: servicios de alojamiento y alimentación, manufactura y atención médica.

¹ Oficina de Estadísticas Laborales (Encuesta de empleo cuatrimestral y Censo cuatrimestral de empleo e ingresos); Análisis de Moody; Encuesta de la Comunidad Estadounidense, 2019.

Analysis behind

In this short section, the transposition technique was the most applied as lexical and syntactical structure from English to Spanish does require to change the order of the terms to

meet coherence. In addition, for the modulation procedure, there is one specific example, “OES and QCEW” translated as “Encuesta de empleo cuatrimestral y Censo cuatrimestral de empleo e ingresos”; this change was needed as in the original text it is of common usage the abbreviations, in this case for specific surveys; however, in Spanish there were found standardized translation for the meaning of the abbreviations, and as the surveys were not previously mentioned within the text, there was a need to add the specific meaning of both surveys. For literal translation, as previously mentioned, most of the structure in Spanish is similar to the one in English as both languages come from Latin, making it natural and coherent to apply literal translation for certain phrases. In this short section, there was one example of punctuation changes as in English, after three listed items, objects, or words, there should be a the *comma* before “and”, but in Spanish, this is not one of the uses of *comma*, meaning that the punctuation is changed from one language to the other. Finally, for the omission, explicitation, and amplification techniques, there are no examples in this referred section.

Paragraph 9

“The interesting **thing** is **a** lot of people **look at me** and **they** decide that **Asian females are not** good at sales. No matter how many years of **successful experience** I’ve had before **and** in my **company currently**, all **they** see is, well, she’s in operations now, she’s too ‘black and white’ to understand sales. And **I** think **it’s also just being** an Asian woman: if **I** do not act in the way they expect me to—**to** be nice and docile—I **get blacklisted.**”

“Lo interesante es que muchas personas me ven y deciden que las mujeres asiáticas no son buenas en ventas. No importa cuantos años de experiencia exitosa tuviera con anterioridad, en mi compañía actual, todo lo que ven es, bueno, ella está en operaciones ahora, ella es muy ‘blanco y negro’ para entender ventas. Y pienso que simplemente es ser una mujer asiática: si no actúo como ellos esperan que lo haga, ser buena y dócil, te ponen en la lista negra.”

Analysis behind

In this paragraph, most of the text was literally translated as the original text was a quote from an interview; however, there are specific cases that needed the application of multiple translation techniques. For omission, pronouns do not need to be mentioned as they are implied within the verb conjugation of the basic Spanish language structure. There are a couple of examples of translations, limited to structural and syntactical differences between

both languages. Therefore, there are two examples of modulation based on providing naturality and coherence to deliver the intended message, rather than follow the original message structure. In addition, some amplification examples are part of the paragraph as articles to specify number and gender are needed within the Spanish language structure. For explicitation and punctuation changes no examples were found in this paragraph.

Paragraph 10

“How supported **do** I feel in my **job field**? Not **that** much. I **kind of** feel like **I’m on an island all by myself**... **I** don’t really have **a lot of** leaders **around me** to follow their example.” 43-year-old **Black man**, customer sales rep

“¿Qué tan apoyado me siento en mi ámbito laboral? No mucho. Me siento como si estuviera solo en una isla... Realmente no tengo muchos líderes a mi alrededor para seguir su ejemplo.” Hombre afroamericano de 43 años, empleado de ventas al cliente.

Analysis behind

Similar to the past paragraph analyzed, this is a quote taken from an interview, thus, most of the text should be translated in a literal way to maintain the author’s tone and perspective; although, there are some exceptions that require a different translation procedure. First, the transposition technique is always required due to the structural differences between Spanish and English. Second, modulation is required to meet the message tone and audience to who the target text is directed; for example, “a lot of” translated as “muchos” as both implied the same meaning, however, for the target audience and naturality was better to choose “muchos”, rather than other options. Third, omission procedure is needed as in Spanish articles to denote an infinitive form of verb or pronouns are not needed, as these are specified in the verb conjugation. Fourth, there is one example of amplification and punctuation change; as the structure for questions in Spanish requires the use of “¿” and the so-called “how” has multiple translations in Spanish depending on its use, thus, there is necessary to add a word to delimit that function. Fifth, there are no examples of explicitation.

Paragraph 11

A recent **McKinsey research effort** sought **to** identify the progression of **frontline workers** as well as the attributes and experiences that enable their advancement.¹⁸ We analyzed historical **job progressions** of **four million** workers without **four-year degrees**, also

know as **individuals skilled through alternative routes (STARs)**,¹⁹ who **successfully transitioned from low- to higher-wage occupations** and identified the jobs that created pathways to **higher-paying roles**. The **career journey** was segmented into **five job categories**²⁰:

¹⁸Unlocking **experience-based job progressions** for millions of workers,” McKinsey, **June 2, 2021**.

¹⁹“**STARs: Skilled through alternative routes**,” Opportunity@Work, accessed **July 28, 2022**.

²⁰Most **frontline jobs** are concentrated in the **Origin and Mid-wage Origins categories**, but about 20 percent are **Target jobs**

Un reciente esfuerzo investigativo de McKinsey buscaba identificar la progresión de los trabajadores de primera línea, así como los atributos y experiencias que permitían su avance profesional.¹⁸ **Hemos analizado históricamente la progresión laboral de 4 millones de trabajadores sin un título universitario, también conocidos como *individuos calificados a través de rutas alternativas* (STAR por siglas en inglés),**¹⁹ **quienes tuvieron una transición exitosa de una ocupación de salario mínimo a alto e identificaron los puestos que crean rutas de avance a los puestos mejor pagados. La carrera profesional se segmentó en 5 categorías laborales**²⁰:

¹⁸“**Desbloqueando progresiones laborales basadas en experiencia para millones de trabajadores**” McKinsey, **2 de junio del 2021**.

¹⁹“**STARs: Skilled through alternative routes**,” Opportunity@Work, tomado **el 28 de julio del 2022**.

²⁰ **La mayoría de los puestos de primera línea están concentrados en las categorías de origen y salario medio, pero solo un 20 por ciento son puestos meta.**

Analysis behind

For this paragraph, in the case of literal translation, transposition, omission, and amplification techniques, there are multiple cases in which it is applied to meet the proper structure differences from one language to another. Moreover, for modulation procedure has multiple examples, such as “four million” to “4 millones” to maintain parallelism on the whole target text; then, “four-year degree” was translated to “título universitario” as culture-wise the titles at the university level are the ones that are 4 years degrees. For “individuals skilled through alternative routes (STARs)” the term does have an equivalent in Spanish but its abbreviation is the same in Spanish and English, thus added that part for understanding. In addition, for “low wage”, after reviewing tools such as Linguee and ProZ, the best equivalence is “salario mínimo”. Then, for explicitation and punctuation changes there are no examples within this paragraph.

Paragraph 12

“We’ve had some really bright, talented Black individuals, but the culture just will not allow them to move forward or advance in positions that are beyond the bottom of the totem pole. I’m going to have to eventually make the decision to move elsewhere to pursue my goals and career dreams, because it’s just not going to happen here.” 50-year-old Black woman, customer service supervisor

“Tenemos algunos brillantes y talentosos individuos afroamericanos, pero la cultura simplemente no les permitirá moverse o subir a posiciones que estén más allá del punto más bajo de la cadena. En algún momento, voy a tener que tomar la decisión de moverme a otro lado para lograr mis objetivos y sueños profesionales, porque simplemente no va a suceder aquí.” Mujer afroamericana de 50 años, supervisora de servicio al cliente

Analysis behind

For this paragraph, the literal translation technique should be applied as English and Spanish have plenty of similarities in structure; with the exception of transpositions and modulations applied to ensure proper message transmission and syntactical and lexical changes from one language to the other (adjective + noun versus noun + adjective). In the case of modulation, as mentioned before, “Black” can be considered an offensive term to use, thus, its equivalent to using should be “afroamericano”; then, “bottom of the totem pole” does not have a specific translation in Spanish, thus, after investigation, the translator decided to use “el punto mas bajo de la cadena” to have the closest meaning to the original, and using an idiom to meet the tone of the original quote. Techniques such as explicitation and punctuation changes do not have examples within this paragraph.

Paragraph 13

On an encouraging note, we have seen companies implement programs that could create a much richer, supportive frontline work experience. They have started to extend more support and opportunity to the front line, including higher starting wages, tuition reimbursement programs (such as Walmart’s LiveBetterU), better training, more flexible work schedules, child care, parental leave, and retirement benefits such as 401(k) accounts and financial planning.

En una nota más positiva, hemos visto a las compañías implementar programas que pueden crear una experiencia laboral mas rica y alentadora para la primera línea. Han empezado a expandir su apoyo y oportunidades a la primera línea, incluyendo salarios base

más altos, programas de reembolso de gastos estudiantiles (tales como LiveBetterU de Walmart), mejores capacitaciones, horarios de trabajo más flexibles, red de cuidados infantiles, licencia de maternidad o paternidad, y pensión de retiro tales como las cuentas 401(k) y planes financieros.

Analysis behind

At the beginning of the paragraph, the translator found an example of modulation with “On an encouraging note” being translated as “En una nota mas positiva”, which has a small modification to meet the sense of the original message. For transposition and literal translation, all examples reflect the proper structure for both languages. In terms of omission, the technique was applied as Spanish does not need pronouns in addition to delimiting subject, as it is part of the verb conjugation. Then, for amplification, in Spanish articles are mandatory to delimit gender and number for nouns. Finally, there are no examples for explicitation and punctuation changes.

Paragraph 14

The front line makes **up** a large portion of the **total workforce** at many companies, acting **as** the **organization’s operational muscle**. Executives can **harness the frontline workforce’s talents** by making it an **innovation engine**—**gathering insights** from **customer-facing employees**, involving **frontline workers** in decision making, and giving them a platform to share ideas with **senior leaders**. Companies **could also** consider expanding benefits, such as **employee stock ownership plans (ESOPs)**, that can contribute to **meaningful wealth creation**. These efforts could help **frontline workers** feel more included and invested in the business.

La primera línea corresponde a una gran parte de la fuerza laboral total de muchas compañías, siendo el músculo operacional de la organización. Los ejecutivos pueden aprovechar los talentos del personal de primera línea al hacer un motor de innovación – recopilación de datos de empleados trabajando directamente con clientes, incluyendo empleados de primera línea en la toma de decisiones, y brindándoles una plataforma para compartir sus ideas con la gerencia general. Las compañías también pueden considerar expandir los beneficios, tales como Planes de Recepción de Acciones para Empleados (ESOPs como sus siglas en inglés), que pueden contribuir de manera significativa a creación de riqueza. Estos esfuerzos pueden apoyar a los trabajadores de primera línea a sentirse mas incluidos y participantes del negocio.

Analysis behind

In this paragraph, as noticed from color coding, the technique most used was transposition as for syntaxis, Spanish has a different structure order than English; which is adjective + noun, and in Spanish, is noun + adjective. The second procedure used is literal translation as most of the ideas, coherence, and message from the original text, can be transferred from one language to another. In addition, for modulation there are multiple examples such as “gathering insights”, “senior leaders”, and “employee stock ownership plans (ESOPs)”; that were modified and translated based on the investigation of different tools such as Linguee and ProZ, together with parallel text from McKinsey and other consulting companies, such as Boston Scientific and Deloitte. Moreover, for omission and amplification, there are examples as English needs explicit pronouns for subjects when Spanish has implicit subjects. Aside, for Spanish, there are needed articles to define the number and gender of some nouns, which are not needed in English. For explicitation and punctuation changes, there are no cases in this paragraph above.

Paragraph 15

Pipeline data and analytics

Overall metrics

All **pipeline metrics** (for example, representation, **promotion rates**, **hiring shares**, or **attrition rates**) were **initially calculated** for each **participating company**. **Aggregate results** across companies were then calculated by taking the **unweighted average** of the representation, **promotion rates**, **hiring shares**, and **attrition rates** of all companies.

Datos y análisis de la Red

Métricas generales

Todas las **métricas de la red** (por ejemplo, **representación**, rangos de ascensos, cuotas de contratación, o cuotas de renuncia y despidos) fueron calculadas inicialmente para cada compañía participante. Los resultados agregados a lo largo de las compañías fueron luego calculados al tomar el **promedio ponderado de la representación**, rangos de ascensos, cuotas de contratación, y **cuotas de renuncia y despidos** de todas las compañías.

Analysis behind

As in previous paragraphs, the structure for the translated text is mostly similar from English to Spanish, thus, there are multiple cases with literal translation; but also, some more for transposition as the difference in structure can be modified by applying it. For amplification, the addition of articles in Spanish to complete meaning are the examples in this paragraph. Aside from these techniques, omission, explicitation, and punctuation change are not presented in this section analyzed.

5.1.2.2 Color Coding of “La feminización del cuidado no remunerado: experiencia de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela” text, translated from Spanish to English

Paragraph 1

La cita anterior evidencia que el encargarse del espacio privado y el cuidado, tiene como base un ideal que proviene y se centraliza en este “atributo natural”, en una fuerte interiorización en cada una de las mujeres; es por esto, que el espacio privado, el cual, tiene que ver con el trabajo de reproducción, cuidado, trabajo doméstico no remunerado y remunerado, entre otros; es reconocido socialmente como exclusivo de la mujer. Así mismo, todo converge en elementos impuestos, transformados y principalmente bajo una construcción social que no solamente ha sido histórica y material al enclaustrar a las mujeres, sino que también ha limitado su decisión y posibilidad para incorporarse a otros espacios, pero de forma invisible, creando la ilusión de que es natural.

The previous citation proves that private space and caregiving work, have as basis an ideal that came from and is centralized on this “natural attribute”, in a strong internalization in every single women; that is why, the private space, which is related to reproductive, caregiving, and domestic paid and unpaid work, and others; are socially recognize as exclusive to woman. Likewise, it all converges on imposed elements, transformed and mainly under social construction, that now only has been historical and material to enclosed women; however, has also limited their decision and possibility to be incorporated into other spaces, but in a visible way, creating the illusion that it is natural.

Analysis behind

In this first paragraph, the technique most applied is literal translation as Spanish and English have multiple parts of a sentence that follow the same structure; however, there are

some specific that change from one language to the other, such as noun + adjective in Spanish, and adjective + noun in English. Having that into account, the second most used procedure is transposition which exemplifies the adjustment to meet the proper syntax per language. Moreover, for modulation technique, there are two examples, “encargarse del espacio privado y el cuidado” which was needed to adjust the syntactical order of the words, but also omit “encargarse” and add “work” to make clear the message from one phrase to another; and “tiene que ver con” was translated to “is related to” that is not the exact translation, but it makes sense with the format and coherence of the sentence. Then, for the omission procedure, examples are related to articles to define noun’s number or gender, that are needed in Spanish, but not in English. Moreover, in English structure the subject is explicit, but in Spanish, it can be implicit; thus, for amplification, there are some examples within the paragraph.

Paragraph 2

Es así que, producto de estas transformaciones socio-históricas, se construye un pensamiento social donde las mujeres son comprendidas como aquellas quienes deben de encargarse de roles socialmente impuestos como lo es el del trabajo de cuidado. Por ejemplo, el III Estado de los Derechos Humanos de las Mujeres en Costa Rica (2019) afirma que, poco más del 65% de la población prefiere asignar las labores de cuidado en el hogar a la madre, alguna mujer de familia, o ajena a esta (pero siempre mujeres), ya que consideran que con la mujer las personas dependientes están “mejor cuidadas”, y no solo eso sino que también demuestra el arraigo que existe de destinarla al confinamiento del espacio privado sin importar su edad, ya que muchas veces son niñas, adolescentes, adultas y adultas mayores quienes deben ejercer dicho trabajo.

That is how, as a product of these socio-historical transformations, it is constructed a social thought on which women are comprehended as those who should be in charge of socially imposed roles like caregiving work. For example, the third State of the Women's Human Rights in Costa Rica (2019) states that little more than 65% of the population, prefers to assign home caregiving duties to the mother, women within the family, or outside it (but always women), as they considered that with women, the dependent person, will be “best take care of”, and not only that, besides it also demonstrates the entrenchment that exists to enclosed them to private spaces regardless of age, as in several cases they are young girls, teens, adults, and elderly women who have to perform this work.

Analysis behind

For this paragraph there are examples of omission and amplification, in Spanish the articles define the number and gender of a noun; however, in English, the articles have fewer uses, and in some cases, the gender is defined within the noun. In the case of amplification, pronouns and particles like “to” or “be” are needed to complete the basic syntax for English, which are not always needed in Spanish. Therefore, multiple examples of transposition can be found, such as “labores del cuidado del hogar”, translated as “home caregiving duties” to follow the structure for each language; noun + adjective in Spanish, and adjectives + noun in English. In addition, the literal translation technique is the one most used within the paragraph as Spanish and English both came from Latin and have similar sentence structures, allowing literal translation. Finally, there are no examples of explicitation and punctuation change in this paragraph.

Paragraph 3

Lo anterior trae **consigo** una determinada lógica **bajo** la cual se socializa y organiza a **la** población y las **relaciones sociales**, **generando a su vez una determinada forma de percepción** y materialización de **la** vida en sociedad (leyes, instituciones, acuerdos, entre otros). Esto podría ser de mucho interés para instituciones y organizaciones que constantemente trabajan para incidir en la **normativa jurídica y política** que redistribuye, la cuestión de **la carga doméstica** y **el trabajo de cuidado** hacia **las** mujeres, **en** especial si se considera que más de **la** mitad **de la** población (**tanto** en hombres, como en mujeres), aún se inclina por **recargar “voluntariamente”** el **trabajo de cuidado**, especialmente aquel cuidado perteneciente a las poblaciones que requieren de una supervisión y **esfuerzo constantes**, como **adultos mayores**, infantes, personas con discapacidad, entre otros. **Este tipo de pensamiento**, al ser naturalizado y colectivo, se materializa en las **instituciones de la sociedad** y en cómo invierten estas en la **realidad de las y los habitantes**.

The previous **statement** brings a determined logic in which **it is socialized and organized a population and social relationships**, also **generating a specific perception and materialization form of life in society** (laws, institutions, agreements, and others). This could be of great interest to institutions and organizations that constantly working to influence the **legal and political regulations that redistribute the issue of domestic burden and caregiving duty to women**, especially if considered that more than half population (in men and women), still insist in **“voluntarily” recharging the caregiving work**, especially the caregiving related

to population that requires supervision and constant effort, such as elderly, infants, people with disabilities, among others. This train of thought, being naturalized and collective, has materialized in society institutions and the way they invest in these habitants' realities.

Analysis behind

For the third paragraph analyzed, literal translation is again the most applied technique, as the source language and target languages have similarities in their structure as both languages come from Latin. For the next procedure, transposition has multiple examples to meet the phrase structure changes from English to Spanish. In addition, for the omission, “bajo la cual” the word “bajo” is not needed in English to translate the same meaning, thus, it could be omitted. For amplification, in English is needed to use pronouns to complete the language's syntactical structure, which is sometimes implicit in Spanish. In terms of modulation procedure, there are multiple examples, “generando a su vez una determinada forma de percepción” translated to “also generating a specific perception” which omitted redundant words to avoid confusion.

Then, for explicitation, “statement” was needed at the beginning of the paragraph as a subject was missing in English; for “form” was also needed as a subject within the sentence, as in the original text the subject was implicit. Moreover, only one example of amplification was applied in the target text as a pronoun was required. There is one example of punctuation changes in “que redistribuye, la cuestión” as the *comma* was not needed in the English sentence.

Paragraph 4

En este sentido, la salida de las mujeres del espacio privado al ámbito laboral remunerado ha estado condicionada por diversos factores como lo son las reivindicaciones de los movimientos sociales de mujeres y feministas, satisfacción de necesidades, además, del desarrollo tecnológico, la política de costes salariales, las formas de organización de la producción, factores económicos de necesidad del grupo familiar (Agenjo, 2021), y esto sin obviar las grandes luchas de los movimientos sociales que han reclamado la inclusión y el cumplimiento de los derechos de las mujeres con respecto a la incorporación de ellas al mercado de trabajo.

As a result, women outbreak from private space to paid workforce has been conditioned for various factors such as women and feminist social movement claims, needs

satisfaction, also, technological development, wage cost policy, organizational forms of production, economic factors of familiar needs (Agenjo, 2021), and this without taking into account the big fights of social movements to claim inclusion and the compliance of women rights regarding their incorporation to the job market.

Analysis behind

In this paragraph, the main translation procedure applied was transposition, as the paragraph is compound for multiple noun + adjective phrases, and as that structure order is different in Spanish and English, the changes were required. For modulation, there are specific cases like “En este sentido” translated as “As a result”, to avoid confusion when using the same transition phrases in multiple paragraphs. Moreover, the literal translation still has multiple examples as aside from “noun + adjective phrases” the rest of the sentence’s structures, are similar from Spanish to English. Then, for omission and amplification, as explained in the previous paragraph analysis, English needs explicit pronouns as subjects and can omit articles to delimit the number or gender of nouns. Aside, there are no examples of explicitation and punctuation change in this paragraph.

Paragraph 5

Estos datos resaltan que, aunque **las** mujeres estén en el **espacio laboral remunerado**, si viven con **personas dependientes** en **el espacio privado**, **la** **responsabilidad de su cuidado y atención**, recae casi **de forma** exclusiva sobre **las** mujeres, **lo** que produce una **sobrecarga laboral** (doble o triple **jornada**) **exhaustiva** y las imposibilita de dedicarse a otros espacios o actividades.

These data highlight that even though women are part of the paid workforce if they live with dependent people in private space, their caregiving and attention responsibility, revert almost exclusively to women, creating a thorough labor overcharge (double or triple working hours) and precluding them to dedicate themselves to other spaces or activities.

Analysis behind

Moving to a new paragraph, the techniques of literal translation, transposition, omission, and amplification were applied as described previously. However, there is a different example for modulation, about translating “jornada” into “working hours” as after checking resources like Linguee and ProZ, the best option for translation is “working hours”.

In addition, there is one punctuation change in the first sentence as English does not need the comma after *that*.

Paragraph 6

Entonces, en Costa Rica la **cotidianidad en zonas rurales** continúa siendo trastocada por particularidades como **el trabajo de cuidado no remunerado**, **la** falta de **oportunidades laborales**, entre otras, **las** cuales, han tenido **como consecuencia** el impacto **en grupos poblacionales** como **las** mujeres y **las y los** adultos mayores.

Then, in Costa Rica, rural zone ordinariness continues to be compromised by particularities such as unpaid caregiving work, lack of job opportunities, among others; which, had their impact on women and elderly populations as a consequence.

Analysis behind

To keep parallelism throughout the document, the word "cotidianidad" was previously translated as "ordinariness"; thus, to maintain coherence and naturalness, the same word was used. Therefore, in the case of "adultos mayores" it was translated as "elderly" as the word *perse* means the same after checking in tools such as ProZ and Linguee. Then, for the last sentence, when translating the message, it created confusion for the audience; thus, the order of the phrase was adjusted to keep the proper message. Additionally, examples of literal translation, omission, and amplification are present, as previously discussed in other paragraphs are based on language structure. There are no instances of explicitation or punctuation changes in this paragraph.

Paragraph 7

1.5. Estado de la cuestión

El **presente apartado** da a conocer los alcances y hallazgos de investigaciones en torno **a** las temáticas de interés para la elaboración de la investigación, las cuales, **fueron** identificadas por medio de una **revisión bibliográfica**. Por ello, para contextualizar y organizar el **estudio realizado**, **se parte de dos categorías de análisis**: la **división sexual del trabajo** y mujeres: cuidado y ruralidad.

1.5 Antecedents

This section is to show the scope and findings of investigations around the topics of interest for the elaboration of this investigation, which were identified throughout a

bibliographic revision. Hence, to contextualize and organize the presented study, the analysis was divided into two categories: work sexual division and women, caregiving, and rurality.

Analysis behind

In the case of this short paragraph, there are examples of literal translation, transposition, modulation, punctuation changes, and omission. For literal translation, most of the paragraphs implied the same structure from one language to another, thus, it was the most applied procedure. Therefore, for transposition, there are few examples within this section, but was because of the noun + adjective structure difference in Spanish and English. Then, for modulation, “Estado de la cuestión” was translated as “antecedents” to keep the parallelism within the whole investigation, as the term *antecedents* is the proper one for investigations. The case of “se parte de dos categorías de análisis” the order of the phrase was changed to avoid confusion within the sentence. For punctuation changes, “las cuales,” the *comma* after is not necessary in English. Lastly, for explicitation and amplification, there are no examples in this section.

Paragraph 8

Desde **la perspectiva** del **enfoque feminista** es que se comprende que **el** género influye **en** las **concepciones del conocimiento**, **en** la persona que conoce y **en** las prácticas de investigar, preguntar y justificar. Identifica las **concepciones dominantes** y las **prácticas de atribución, adquisición y justificación** del conocimiento que sistemáticamente ponen en desventaja a las mujeres.

From the **feminist focus**, it is comprehended that **gender influences the knowledge conceptions**, **the person who knows**, and **the practices to investigate, question, and justify**. **Identify the dominant conceptions and the attribution, acquisition, and justification practices of knowledge that systematically put a disadvantage on women.**

Analysis behind

For this paragraph, literal translation procedure was the most applied within the text as the structure of English and Spanish is similar, even though, there are some syntactical differences between them on the order of noun + adjective, which allow the use of transposition technique. Moreover, for the omission in the source paragraph there are multiple examples, such as “la perspectiva” as it was redundant to mention *feminist focus perspective* as using “feminist focus” does imply the same meaning. For amplification

procedure, there is one example on the translated text, as the subject in English must be explicit per structure, thus, the pronoun's addition is required. For the amplification, modulation, and punctuation changes there are no examples within this paragraph.

Paragraph 9

4.4. Población participante

Para efectos de la presente investigación se contó con la participación de seis mujeres que cumplieron con los criterios de selección inclusión y exclusión, y por tanto, el papel de cuidadoras de personas adultas mayores habitantes de zonas rurales de los cantones de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela; al ser elegidas brindaron una serie de insumos con la finalidad de realizar el análisis sobre la feminización del cuidado no remunerado. Esta selección se realiza en base a los siguientes criterios:

4.4 Participant population

For this investigation, six women met the criteria of inclusion and exclusion participation; thus, their role as elderly caregivers living in rural areas in Barranca, Puntarenas; Angeles Norte and La Paz, Piedades Norte, San Ramon, Alajuela. When chosen, they provided a series of information to analyze the feminization of unpaid caregiving. The criteria for the selection are the following:

Analysis behind

Moving on to the next paragraph, there are two examples of modulation; first, “Para efectos de la presente investigación” which was translated as “For this investigation”, to aim for a straightforward phrase, which characterizes English communication. Second, “Esta selección se realiza en base a los siguientes criterios” was changed to “The criteria for the selection are the following”, as English does tend to apply passive voice to emphasize certain content, rather than in Spanish as it is not common to use passive voice. Aside, the transposition procedure has plenty of examples as the structure for nouns and adjectives differs from Spanish to English. In the case of omission and amplification, some articles and redundant words were omitted when translating to English; while a pronoun was added in English to meet the proper grammatical structure of the sentence. The rest of the paragraph shows examples of literal translation as no further procedures were needed.

Paragraph 10

A través de las opiniones, experiencias y perspectivas de las mujeres cuidadoras de zonas rurales, a quienes se encuentra dirigida y tiene la finalidad de lograr analizar en qué manera se expresa la feminización del cuidado en los espacios cotidianos de ellas y las implicaciones que este tiene en ellas.

Through opinions, experiences, and perspectives of caregiving women in rural zones, to whom is directed this investigation and has the finality to achieve the analysis on which way it is expressed feminization of caregiving in ordinariness spaces for them, and implications that this have for them.

Analysis behind

This short paragraph portrayed two examples of modulation, such as “espacios cotidianos” which was changed to “ordinariness spaces”; the term was used to keep parallelism within the whole paper, as it was the standardized equivalent used by the translator. Then, for amplification, *this investigation* needed to be added to complete the meaning and structure of the sentence in English, this also applied to *the* and *it*, other examples of amplification. In addition, for the transposition technique, a couple of examples were presented to comprehend and use the proper structure change from Spanish to English. Therefore, some examples of omission are presented in the source paragraph, as Spanish does apply articles to define the number and gender for nouns, but not for English, letting the translator omit them.

Paragraph 11

Para realizar el contacto con las participantes se pretende reclutarlas de forma presencial, al visitar las comunidades, con todas las medidas de sanidad necesarias. Asimismo, debido al contexto de pandemia por el virus Sars-CoV 2 que en ese momento no había finalizado, también se utilizó la herramienta de las redes sociales como forma de comunicarle a la población rural de Puntarenas y San Ramón sobre la búsqueda de mujeres cuidadoras. Luego, se seleccionaron seis de ellas de acuerdo con los criterios establecidos para este estudio.

To make contact with the participants was planned to recruit them in person, when visiting the communities, applying all the sanitary preventions needed. Moreover, because of the pandemic situation with the Sars-CoV 2 virus, which was still going on at that time, the

media was also used as a communication tool to reach to rural population in Puntarenas and San Ramon, about the search for caregiver women. Then, was selected 6 of them per the established criteria for the study.

Analysis behind

In this new paragraph, most of the text was literally translated as there was no need to apply other techniques in most sections as the similarities in structure for both languages. For omission and amplification, there is just one example each, as one article was omitted from Spanish to English, and a particle was included in English to follow proper verb conjugation (infinitive in this case). Therefore, there are four examples of modulation, based on providing naturality and coherence to deliver the intended message, rather than follow the original message structure. In addition, some transposition examples are part of the paragraph as the noun and adjective order is inverted from Spanish to English. Aside, for explicitation and punctuation changes no examples were found in this paragraph.

Paragraph 12

4.7.9. Presentación del informe

En esta fase se obtuvo el documento final de la investigación y la exposición final que detalla lo más posible el proceso investigativo, incluyendo cronogramas, anexos, evidencias, instrumentos utilizados, recomendaciones, conclusiones, así como las correcciones que nos sean indicadas, para la defensa pública ante el tribunal examinador de la Sede de Occidente.

4.7.9 Paper presentation

In this phase was obtained the final investigation document and final exposition which detailed as much as possible on the investigation process, including scheduling, annexes, evidence, applied instruments, recommendations, and conclusions, as well as the corrections that will be highlighted for the public Dissertation in front of the examiner a tribunal at the West Branch.

Analysis behind

For the twelve analyzed paragraph, multiple examples of transposition were presented, in order to meet the proper sentence structure in English. In addition, two modulation cases were found to keep coherence and tone naturality from one text to the other. Moreover, for amplification there is “and” which was added in English as the words were

written as a list, and per structure rules, the last item needs to be separated by “and”. The rest of the paragraph was translated by applying literal translation as the sense, structure, tone, and vocabulary from the source language, were natural and coherent for the target text too.

Paragraph 13

Además, al darse las entrevistas en diversos espacios geográficos (San Ramón de Alajuela y Barranca de Puntarenas), se tenía planeado inicialmente que en todas las entrevistas se debería contar con la participación completa del equipo de investigadoras. Sin embargo, debido a la tragedia vial en la ruta conocida como “Cambronero” en septiembre de 2022, la cual cobró las vidas de varias personas, fue imposible para algunas de las investigadoras, quienes residen en San Ramón, el trasladarse a los espacios de entrevista, por lo que se debió recurrir a medios alternativos para llevar a cabo el proceso, como por ejemplo entrevistas por medio de videollamada o vía mensajes de WhatsApp.

In addition, as the interviews took place in different geographic spaces (San Ramon, Alajuela, and Barranca, Puntarenas), it was initially planned that all interviews would have the participation of the full investigation team. Despite, because of the road tragedy on the route known as “Cambronero” in September 2022, which resulted in multiple deaths; it was impossible for some investigators, who live in San Ramon, to get to interview spaces; thus, it needed to resort to alternative means to carry out the process, such as video call interviews or WhatsApp messaging.

Analysis behind

For this paragraph, the translator went with multiple modulation examples to keep naturality and tone from the source text; while still keeping the same message. There are also different transposition examples, based on syntactical order and structure of each language. Moreover, some examples of omission were used as English does not need articles to define or delimit a noun, contrary to Spanish. For punctuation changes, for locations or cities, the particle “de” was changed to a *comma*, as this is the natural and common structure for locations in English. Aside from these, literal translation was the procedure applied to put it all together, as the structure of the paragraph in Spanish, does agree with the one in English. For amplification and explicitation there were no examples within this selected paragraph.

Paragraph 14

Estos roles de género, vistos como mandatos sociales, continúan estando muy presentes en la sociedad actual, incluso cuando los movimientos y luchas por los derechos de las mujeres han presentado avances de gran importancia para la liberación sistemática femenina y la adquisición de derechos en diversos contextos; el generar conciencia e intervención social sobre la importancia de las mujeres que se dedican a diario a las tareas de cuidado es probablemente de los retos más importantes que persisten en estas luchas, especialmente en una sociedad que se enfrasca, haciendo uso de todos sus medios, en confinar a las mujeres al espacio privado. Para las mujeres, aún en el 2023, el tener un marido, hijos e hijas y dedicarse total y desinteresadamente a ellos, continúa siendo una aspiración para la cual se les cría y se les educa, o bien cuando no cumplen con ello, se les juzga, critica y hasta aísla.

These gender roles, seen as social mandates, continue to be very present in current society, even when the women's rights movements and fights have been present advancements of great importance for female systematic liberation, and rights' acquisition in diverse aspects. To generate consciousness and social intervention on the importance of women who dedicate themselves daily to caregiving work, is probably, one of the most important challenges that are still present in these fights, especially in a society that is engaged, making use of all means, to seclude women to private space. For women, even in 2023, to have a husband, sons and daughters, and dedicate themselves totally and without interest to them, is still an aspiration to which women are raised and educated, or when they do not fulfill this duty, they are judged, criticize, and even isolated.

Analysis behind

This fourteen-paragraph was mainly translated by applying literal translation, with the exception of specific transposition examples to follow the proper sentence structure in English. Some omission examples can be found as the articles marked were not needed in English and can be omitted while keeping the same sense of the sentence. Then, for amplification, some pronouns and nouns were added to complete the sentences' sense in English, in a way that the readers can properly understand the message. Although it is a long paragraph, it does not have examples of modulation, explicitation, and punctuation changes.

Paragraph 15

6.2. Recomendaciones

A raíz de la experiencia obtenida por el **proceso de investigación**, el cual fue nutrido por **las voces de las participantes**, permitiendo al **equipo investigador** ahondar **en** una problemática tan invisibilizada, y reforzando los aspectos discutidos en las conclusiones, **se ponen a disposición un conjunto de recomendaciones** que pretenden inspirar y guiar a futuros **investigadores e investigadoras**, aportes a **la carrera de Trabajo Social** y **actores comunitarios**, entre otros.

6.2 Recommendations

As a result of the experience gained through the **investigation process**, which was nurtured by **participants' voices**, allowing the **research team** to deepen an issue that has been hidden, and reinforce the aspects discussed in the conclusions; **a set of recommendations** was created to **inspire and guide future investigators**, **contributions to Social Work career**, and **community actors**, among others.

Analysis behind

In the last paragraph selected for analysis, there are two important examples of modulations; first, “se ponen a disposición un conjunto de recomendaciones” which was translated into passive voice as it tends to be used in English to give emphasis to the direct object rather than the subject. Second, “investigadores e investigadoras” was translated as “investigators” as contrary to Spanish, English terms are mostly genderless and do not need gender clarification, thus, it would be redundant to add *investigators* twice. Then, transposition was employed to accommodate words in their proper syntactical order in English, to meet the same meaning from the original in Spanish. Moreover, articles and particles were omitted from Spanish to English as the language structure does not need them to have sense and proper meaning. Besides, literal translation was used in the rest of the text, as there were no situations in which explicitation, amplification, or punctuation change procedures were necessary.

5.1.3 Glossary

Moving on to the next instrument, part of the translation process is to read and analyze the source text multiple times, not only for understanding, but also to determine words, terms, phrases, or sentences that might need further research. This process is usually misinterpreted to be a dictionary search and to just translate word-by-word from one language to the other.

This investigation activity might be the case for some terminology; however, dictionaries do not take into consideration context when providing an equivalence, which is mandatory to understand and apply a proper translation. This is when a glossary can provide the best and most coherent equivalence, as contrary to a dictionary, it now only contains an equivalent term, glossaries do take into account context and suggestion based on each context.

Within the text analysis step, and even during the translation step, the investigator did thoughtful and deep research within different sources to determine the best word choice for the target terminology. As sources, the analyst used multiple glossaries such as Linguee and ProZ, which provide an equivalent for terms, based on specific context. Aside, the researcher reviewed multiple parallel texts to find and determine the proper equivalent terms to use for each text. On one hand, for the source text in English, as it came from a consulting company named McKinsey, the investigator checked on multiple McKinsey articles and publications; together with articles from competitor consulting companies such as Boston Scientific and Delloite. On the other hand, for the text in Spanish being translated to English, other theses and investigations were reviewed, either from the same university or from other Costa Rican ones; but also, from other institutions in the United States with similar topics, to find a proper terminology for the audience (Americans in Costa Rica).

After determining all the terminology that needed extra research, the investigator can proceed to compile and build a specialized glossary for this paper; as, the idea of a glossary's construction is to provide a specific and centralized source of terminology for any readers, without doing all the same research that the analyst had to go through for this present paper. As previously defined and mentioned in Chapter II, a glossary can provide vital information as it has specialized information, related to the discussed topic, which makes it easier to find terms for any other translator or investigator in the need of equivalency for a phrase or terminology. For this document, the researcher took as a base the glossary model explained by Gapper (2008) called "a terminology management manual", which explained how to select and compile terminology for a specialized glossary. In addition, this investigator not only created one glossary but two glossaries, one from English to Spanish, and another from Spanish to English.

In terms of usefulness, a glossary is a translator tool as it became a resource for future readers, from specialized translators to other investigators on the same topic, who cannot understand or cannot find a proper explanation of specific terminology. Moreover, glossaries

need to be easy enough to understand, to allow random or general readers to appropriately interpret and follow the glossary. In addition, a glossary confection permits the translator to be consistent and apply parallelism within the equivalent text, avoiding confusion and misinterpretation by using different terminology within a text. After determining all the specialized terminology to be added to the glossaries, based on the usefulness to the investigator and readers explained above, the researcher needs to present the glossary in a specific format, which was presented within Chapter III; meaning source term, equivalent term, explanation or context, and grammatical category, all of these to aim for the best comprehension of each term.

5.1.3.1 Specialized Glossary for English to Spanish

Firstly, the glossary from English to Spanish allows the understanding and proper interpretation of the first text translated. In this glossary, can be found the original term or phrase taken from English; then, its equivalent term, determined after further investigation on parallel texts and other glossaries, to ensure proper interpretation. To provide the correct insight on the equivalence selection, this glossary also contains an explanation or definition of the context in which this term was used, permitting another translator to decide if the terminology is of help to them or not. In addition, this glossary also takes into consideration the grammatical category of the terminology as its application might defer from one langue to the other, depending on the grammatical category. In addition, this glossary is intended to help future translators and researchers to find equivalences for specialized terminology.

Table 7. Specialized Glossary for English to Spanish

English term	Spanish Equivalent	Explanation or Definition	Grammatical Category
Acute-care nurse	Enfermero de cuidados críticos	Target occupation for frontline workers starting as medical assistant	Noun
Advancement opportunities	Oportunidades de ascenso	Corporate or work related opportunities to move to a higher position	Noun

Aircraft mechanism and service technicians	Mecánicos y técnicos en mantenimiento de aeronaves	Adjacent occupation to get to Target occupation	Noun
Allyship	Alianzas	Corporate or work related alliances	Noun
American Community Survey	Encuesta de la Comunidad Estadounidense	Official Survey's name	Noun
Automotive master mechanics	Mecánicos automotrices maestros	Adjacent occupation to get to Target occupation	Noun
Bias	Prejuicio	Work prejudice based on unrelated notions, such as gender, race, sexual orientation, etc	Noun
C-suite	Alta Gerencia	People with titles such as C.E.O, C.I.O, etc.	Noun
Career advancement	Progreso profesional	Corporate or work related opportunities to move to a higher position	Noun
Cargo and freight agents	Agentes de carga y transporte	Adjacent occupation to get to Target occupation	Noun
CIO	Director de Tecnologías de Información (TI)	Director position for Information Office	Noun
Comercial loan officer	Oficial prestamista	Target occupation for frontline workers	Noun

		starting as server in food industry	
Computer-network-support specialist	Especialista en soporte de redes informáticas	Target occupation for frontline workers starting as customer service representative	Noun
Computer-user-support specialist	Especialista en Asistencia Informática	Adjacent occupation to get to Target occupation	Noun
Conservation scientist and foresters	Científicos conservacionistas y silvicultores	Frontline job position	Noun
Critical care nurse	Enfermero de cuidado intensivos	Target occupation for frontline workers starting as medical assistant	Noun
Directors, religious activities, and educational leaders	Directores y líderes de actividades religiosas y educación	Mid-wage origin job position	Noun
Diversity, equity, and inclusion (DEI)	Diversidad, equidad e inclusión	Policies related to diversity, equity and inclusion within a company	Noun
Employee benefits in the United States	Prestaciones laborales en los Estados Unidos	For benefits such as paid sick leave, parental leave, etc.	Noun
Employee Experience Survey	Encuesta de Experiencia de Empleado	Official survey's name	Noun
Employee stock ownership plans (ESOPs)	Planes de recepción de acciones para empleados	Specific corporate name for action plans for employees	Noun

Freight, stock, and material mover	Transportista de mercancías, fletes y materiales	Frontline job position	Noun
General internal medicine physicians	Médicos de medicina interna general	Mid-wage origin job position	Noun
Healthcare social workers	Trabajadores sociales sanitarios	Adjacent occupation to get to Target occupation	Noun
Home healthcare aide	Asistencia sanitaria a domicilio	Adjacent occupation to get to Target occupation	Noun
Hourly role	Puesto pagado por hora	Basic paying method	Noun
Individuals skilled through alternative routes (STARs)	Individuos calificados a través de rutas alternativas	Specific corporate name for employees who seek/own their advancement plans	Noun
Insurance underwriters	Agentes aseguradores	Gateway job to get to Target occupation	Noun
Leave of absense	Permiso de ausencia	Benefit provided by companies on which the employee does not work as scheduled	Noun
Living wage	Salario digno	Minimum wage paid which allow to live properly	Noun
McKinsey's Inclusion Assesment	Encuesta de Inclusión de McKinsey	Official Survey's name	Noun

Nurse practitioners	Enfermeros especializados	Adjacent occupation to get to Target occupation	Noun
Occupational Employment and Wage Statistics Survey	Encuesta de Estadísticas de Empleo y Salarios Ocupacionales	Official Survey's name	Noun
Paid Sick leave	Licencia remunerada por enfermedad	Benefit provided by companies on which the employee does not work per sickness, but it is paid	Noun
Parental leave	Licencia por maternidad o paternidad	Benefit provided by companies on which employee to be parent won't work but will still be paid	Noun
Personal-care aide	Asistencia sanitaria personal	Frontline job position	Noun
Plasterers and stucco masons	Escayolistas y estucadores	Frontline job position	Noun
QES	Encuesta de Empleo Cuatrimestral	Official Survey's name	Noun
QCEW	Censo Cuatrimestral de empleo e ingresos	Official Survey's name	Noun
Quality-control-system manager	Gerente de Sistemas de control de calidad	Target occupation for frontline workers starting as customer service representative	Noun

Race in the workplace	Raza en el espacio laboral	Document title, based on race limitations at work	Noun
Real state agent	Agente inmobiliario	Gateway occupation to get to Target occupation	Noun
Retail salesperson	Vendedor minorista	Frontline job position	Noun
Revolving door	Círculo vicioso	Action of moving from one to another position, but on horizontal level	Noun
Road map	Plan de acción	Actions to follow for companies to provide proper opportunities to frontline employees	Noun
Social-justice-based conflict resolution training	Capacitación de resolución de conflictos basada en justicia social	Corporate program for leadership roles to reduce biased decisions	Noun
Software quality assurance analysts and testers	Analistas y probadores de control de calidad de software	Gateway occupation to get to Target occupation	Noun
Sponsor	Patrocinador	Senior person providing sponsorship to a less senior or new employee with the same expertise path	Noun
Sponsorship	Patrocinio	Different to mentorship, implies	Noun

		more involvement and creating advancement opportunities for the sponsored employee	
Stock clerks	Encargados de almacén	Frontline job position	Noun
Surveyors	Inspectores	Target occupation for frontline workers starting as retail sales person	Noun
Talent Pipeline	Red de Talentos	Data base used to gather information on employees' expertise and knowledge to move to other positions	Noun
Tax examiners and collectors	Recolectores y examinadores de impuestos	Gateway occupation to get to Target occupation	Noun
Team building	Desarrollo de equipos	Activities to increase team collaboration	Noun
The Office of the Assistant Secretary for Planning and Evaluation (ASPE)	Oficina del Subsecretario de Planificación y Evaluación (ASPE)	Institution's name	Noun
US Bureau of Labor Statistics	Oficina de Estadísticas Laborales de los Estados Unidos	Institution's name	Noun
US Equal Employment Opportunity	Encuesta EEQ-1 de la Comisión para la Igualdad de	Official Survey's name	Noun

Commission EEQ-1 Survey	Oportunidades en el Empleo		
Work-life policies	Políticas de conciliación de vida laboral y familiar	Policies to keep a proper balance within work and life	Noun

Table 7. Shows the Specialized Glossary for English to Spanish terminology.

Source: Researcher's own creation.

5.1.3.2 Specialized Glossary for Spanish to English

In this section, a glossary from Spanish to English was created, aiming to facilitate the understanding and accurate interpretation of the initial translated text. This glossary contains the original Spanish terms or phrases, followed by their English equivalents, which were determined after further research using parallel texts and other glossaries. To provide clarity on the choice of equivalents, the glossary also includes an explanation or definition of the context in which each term was used, allowing other translators, investigators, or readers to assess whether the terminology is helpful for their purposes. Additionally, the glossary considers the grammatical category of each term, as its application may vary between languages depending on grammatical rules. This glossary aims to assist future translators and researchers in finding equivalents for specialized terminology.

Table 8. Specialized Glossary for Spanish to English

Spanish term	English Equivalent	Explanation or Definition	Grammatical Category
Asociación Costarricense de Alzheimer y otras Demencias Asociadas (ASCADA)	Alzheimer and other Associated Dementias Costa Rican Association	Institution's name	Noun
Caja Costarricense de Seguro Social (CCSS)	Social Security Fund	Institution's name	Noun
Centro de Investigación en Estudios de la Mujer (CIEM)	Research Center for Women' Studies	Institution's name	Noun
Comité Ético Científico de la Universidad de Costa Rica	Scientific and Ethical Committee of the University of Costa Rica	Institution's name	Noun
Comité para la Eliminación de la Discriminación contra la Mujer (CEDAW)	Committee for the Elimination of Discrimination against Women	Institution's name	Noun
Comisión Económica Para América Latina y el Caribe (CEPAL)	Economic Commission for Latin America and Caribbean	Institution's name	Noun
Comisión de Trabajos Finales de Graduación de la	Bachelor's Degree Final Project Commission for	Institution's name	Noun

Carrera de Trabajo Social	Social Work University Program		
Consejo de Seguridad Vial (COSEVI)	National Road Safety Council of Costa Rica	Institution's name	Noun
Consejo Nacional de la Persona Adulta Mayor (CONAPAM)	National Council of the Elderly Person	Institution's name	Noun
Consejo Nacional para la Integración de la Persona con Discapacidad (CONAPDIS)	National Council for the Integration of Persons with Disabilities	Institution's name	Noun
División Sexual del Trabajo (DST)	Sexual Division of Labor	Labor separation based on gender role	Noun
Equipos Básicos de Atención Integral en Salud (EBAIS)	Basic Health Care Units	Institution's name	Noun
Encuesta Nacional de Hogares (ENAHO)	National Household Survey	Survey's name	Noun
Encuesta Nacional de Uso del Tiempo (ENUT)	National Time Use Survey	Survey's name	Noun
Fondo Nacional de Telecomunicaciones (FONATEL)	National Telecommunications Fund	Institution's name	Noun
Gran Área Metropolitana (GAM)	Greater Metropolitan Area	Territorial section name	Noun

Instituto de Desarrollo Agrario (IDA)	Agricultural Development Institute	Institution's name	Noun
Instituto de Desarrollo Rural (INDER)	Rural Development Institute	Institution's name	Noun
Instituto Mixto de Ayuda Social (IMAS)	The Mixed Institute of Social Aids	Institution's name	Noun
Instituto Nacional de Aprendizaje (INA)	National Institute of Learning	Institution's name	Noun
Instituto Nacional de las Mujeres (INAMU)	National Women's Institute	Institution's name	Noun
Instituto Nacional de Estadística y Censos (INEC)	National Institute of Statistics and Censuses	Institution's name	Noun
Instituto Nacional de Seguros (INS)	National Insurance Institute	Institution's name	Noun
Ministerio de Ciencia, Innovación, Tecnología y Telecomunicaciones (MICITT)	Ministry of Science, Innovation, Technology and Telecommunications	Institution's name	Noun
Ministerio de Educación Pública (MEP)	Ministry of Public Education	Institution's name	Noun
Ministerio de Planificación Nacional y Política Económica (MIDEPLAN)	Ministry of Planning and Economic Policy	Institution's name	Noun

Ministerio de Trabajo y Seguridad Social (MTSS)	Ministry of Labour and Social Security	Institution's name	Noun
Mujeres Unidas en Salud y Desarrollo (MUSADE)	Women United in Health and Development	Institution's name	Noun
Organización de las Naciones Unidas (ONU)	United Nations	Institution's name	Noun
Organización de las Naciones Unidas para la Alimentación y la Agricultura (FAO)	Food and Agriculture Organization of the United Nations	Institution's name	Noun
Organización Internacional del Trabajo (OIT)	International Labour Organization	Institution's name	Noun
Organización Mundial de la Salud (OMS)	World Health Organization (WHO)	Institution's name	Noun
Patronato Nacional de la Infancia (PANI)	National Children's Trust	Institution's name	Noun
Política de Estado para el Desarrollo Rural Territorial (PEDRT)	Territorial Council for Rural Development	Institution's name	Noun
Red Nacional de Cuido y Desarrollo Infantil (REDCUDI)	National Child Care and Development Network	Institution's name	Noun
Secretaría Ejecutiva de Planificación Sectorial	Executive Secretariat for Agricultural and	Institution's name	Noun

Agropecuaria (SEPSA)	Livestock Sector Planning		
Sistema Nacional de Cuidados y Apoyos para Personas Adultas y Personas Adultas Mayores en Situación de Dependencia (SINCA)	National System of Care and Support for Adults and Older Adults in Dependency	Institution's name	Noun
Sustentantes	Graduate researchers	Person or people presenting an investigation paper	Noun
Tasa de conversión social	Social converssion rate	Metric for measuring	Noun
Trabajo de cuidado no remunerado	Unpaid caregiving work	Investigation title and main topic	Noun

Table 7. Shows the Specialized Glossary for Spanish to English terminology.

Source: Researcher's own creation.

CHAPTER VI

Conclusions and recommendations

This last chapter aims to provide all the information on details and resolutions found within the investigation and analysis of this paper. Also, its researcher provides recommendations and suggestions for future investigators such as English Bachelor's degree or Translation Undergraduate degree pursuers either at Universidad Internacional de las Americas, or other Universities; specialized translators; and other general readers. Within this section, the analyst provides details and conclusions on each objective presented in Chapter I; together with the restatement of the Research Question.

6.1 Purpose of the conclusion

A conclusion for a paper encloses all the significant findings found and considered throughout the investigation. Reviewing the research question together with the objectives, to explain and deduce, through the analysis, how they were either accomplished or failed to be completed during the research. In this part, the researcher deciphers the importance of the results and their connotations within the whole investigation, for the theoretical and practical parts of it. Moreover, this conclusion provides suggestions or recommendations for future research, as mentioned above, for other translator students or specialized translators seeking specific information or equivalent content on similar topics, or even casual or general readers, looking for a topic of interest or reference for a related topic, and not necessarily for translation purposes. Lastly, this chapter also takes into consideration multiple aspects of the

study, shows potential next steps to take, and demonstrates findings of relevance for the field of study.

6.2 Conclusions

Regarding conclusions, all the key discoveries related to the specific objectives established within Chapter I will be presented and explained. Showing how each objective was conveyed during the investigation process. Per objective, results will be discussed, highlighting how they aligned or differed from the initial conjectures. Therefore, the methods and procedures to obtain the information and get to the results will be included, to prove or disprove the effectiveness in achieving each objective.

6.2.1 To analyze the original documents for linguistic and cultural elements that may challenge direct translation, identifying areas where Human Rights-specific adaptation is required to maintain the desired advocacy impact.

In the case of this objective, the investigator performed text analysis through multiple readings, first, to understand the topic presented within the source document, its message, and purpose; second, to analyze the word's relationship within sentences, paragraphs, and finally as a whole; third, to evaluate the linguistic and cultural elements or terms within the paper, to investigate on external sources and get the proper equivalence on the target text. After analyzing the text through reading, the researcher proceeded to read, review, and investigate the possible linguistic challenges to be presented in the translation process. Within this investigation, the analyst found specific parallel texts that allowed them to get a grasp on how to fight those challenges, such as other publications from the same and similar companies from which the source text was provided; for this specific paper, the first original document was facilitated by a consulting firm called McKinsey, thus, the parallel texts were found and checked on McKinsey and competitors like Boston Scientific and Delloite. The second document was a bachelor's degree pursuer's thesis from the University of Costa Rica, which allowed the investigator to research parallel texts from other Costa Rican universities.

Then, for any cultural element or terminology that might represent a challenge in the translation process, the researcher gathers information from multiple glossaries; either from other translation-related papers like the antecedents found for this investigation; online bilingual glossaries such as Linguee and ProZ; or dictionaries like Merriam Webster dictionary, for English terminology, and *Diccionario de la Real Academia Española*, for

Spanish terms. By putting together all this information, the investigator was able to determine and conquer the linguistic and cultural challenges found within the translation process. Aside, from the specific topics discussed within both source documents, investigation on Human Rights related terminology was needed for a proper translation; in the case of “The race in the workplace: the frontline experience” topics such as equity, inclusion, race-based bias, and payment were the main discussed subject matter, for which the investigator find proper equivalents, after deep research, within parallel texts and tools as the mentioned above. Although, for “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela” document, subjects such as feminization, caregiving duties, and lack of payment were the key discussion points on the whole document, that guided the translator to search for proper equivalence for all topics and related terminology to meet the message and author’s purpose demonstrated within the original paper.

In addition, the analyst of this current paper had to apply seven different translation procedures or techniques to aim for a proper adaptation, which meets the desired advocacy impact on the source’s documents. The applied techniques were: transposition, which allow to justify the order change on a phrase or sentence to meet the syntactical difference from one language to another (English to Spanish and vice-versa); modulation, a procedure to change the perspective on which the original phrase or sentence was written, in order to converge the same intention or advocacy portrayed, and replicate it in the target language; omission, that omit specific particles presented in the source text, that are not needed in the target document, per context or syntactical and lexical structure; amplification, which contrary to omission, add specific particles such as articles or pronouns on the target text, to complete sense or syntactical structures that were not originally needed on the source paper; explicitation, that complementary to amplification, consist on adding words such as nouns which were implicit in one language, but needed to be explicit on the other one to complete the intention and context desired; literal translation, as its name suggested, is about translating word-by-word, a term, phrase, or sentence from one language to the other, which was highly applied on the translations as the natural similarity between Spanish and English languages as they both come from Latin language; punctuation changes, consist on changing, eliminating, or adding a punctuation mark in aims to keep significance and structural coherence in both languages.

Besides, by putting all these elements together, the translator was able to identify and then adapt any Human Rights related terminology within both source texts, in order to keep the desired message translation and the author's intention portrayed in the original documents. This means that, with the help of text analysis, parallel texts, glossaries and dictionaries, and translation procedures or techniques, a translator can overcome the linguistic and cultural challenges related to any specialized translation, in this case, Human Rights related one; in order to meet and keep the original advocacy desired impact.

6.2.2 To conduct a deep analysis of the challenges and impacts of Human Rights terminology in translating texts about vulnerable populations, assessing how these terms affect comprehension and naturality.

For this specific objective, both source documents had a discussion topic related to Human Rights, which allowed specialized terminology within the whole document. On one hand, "The race in the workplace: the frontline experience" exposed topics about proper inclusion in companies or jobs, in terms of benefits and advancement opportunities; guiding the paper to Human Rights terminology at a corporate level. Evaluating the text from a deeper point of view, the original document was aimed to create consciousness about race-related differences at corporate companies, and when translating it, the investigator was aiming to expand the reach of the information to get to Spanish speakers population, mainly Latinos, but also, Afro-Americans and Asian Americans living in the United States that can speak Spanish. These are minority populations, vulnerable to lack of benefits and opportunities as their Caucasian peers, which gave the translator the chance to research proper naturality and comprehension for these populations when finding equivalent terms. To be specific, in the source text can be found terms such as "Black workers", "Latino employees", and "Asian-American people" that per historical context can be either accepted or offensive; "Black" could be welcome by English speakers; however, for Spanish speakers, "negro" can be considered historically offensive, and per investigation, the analyst found a proper and natural equivalent such as "Afroamericano", avoiding the rudeness and bad appeal that the original terminology could have.

On the other hand, "La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de

Alajuela” presented topics such as socially assigned gender roles and the perceptions or expectations that come with them, leading to specialized terminology, but at a household level. In this case, the source text’s audience was women from rural zones who experienced a lack of benefits such as payment or suffered double or triple working hours compared to men; the idea of the investigator was to translate this document to reach the English speaker population within Costa Rica, that have elderly relatives living in Costa Rica too, and that tend to “employ” Costa Rican women for caregiving duties with low payment. Even though the audiences are a little bit different, they do share similarities, in terms of vulnerable women working for poor or no payment. Thus, when the researcher had to translate this paper, the English speaker context had to be taken into consideration, specifically in terms such as “jornadas laborales” and “tareas del hogar”, the translator had to review accepted natural terminology applied in English, to meet the proper meaning, and find equivalents like “working hours” and “household duties”, and what does terms could be implied or meant to the audience reading them.

Putting both perspectives together, the analyst was able to conclude that to reach the proper population and appeal to them in a natural and coherent way, the research for appropriate equivalent terms related to Human Rights can make the difference in how the audience will take the target document. In addition, re-read and re-analyze the source papers and the translated ones afterward, allowed the translator to find and deeply investigate this specialized terminology, to ensure that the proper message was translated from one language to the other, and that could only be completed by assessing these terms from a Human Rights perspective.

6.2.3 To create a bilingual glossary of critical Human Rights and socio-economic terminology encountered in the translations, ensuring consistent and accurate application in both languages, Spanish and English.

For this next objective, the investigator aimed to construct and present a bilingual glossary for Human Rights and socio-economic-related terminology within both texts. First, a glossary containing all the terms from “The race in the workplace: the frontline experience” which represented a complex and/or specialized terminology that requires further explanation or context. The glossary not only contained the equivalent term or phrase in Spanish but also a context’s definition or explanation of when and how was applied; in order to inform future

researchers on the same topic, in a way that other translators can find an equivalent term and know if its application will work or not for the one that they are looking for. Second, “La feminización del cuidado no remunerado: experiencias de seis mujeres cuidadoras de familiares adultos y adultas mayores que habitan en las zonas rurales de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela” text portrayed very specific terminology in terms of Institutions who advocate for women Human Rights, making necessary the Implementation of a second glossary, from Spanish to English, to give proper equivalent Institution’s names and the context for them.

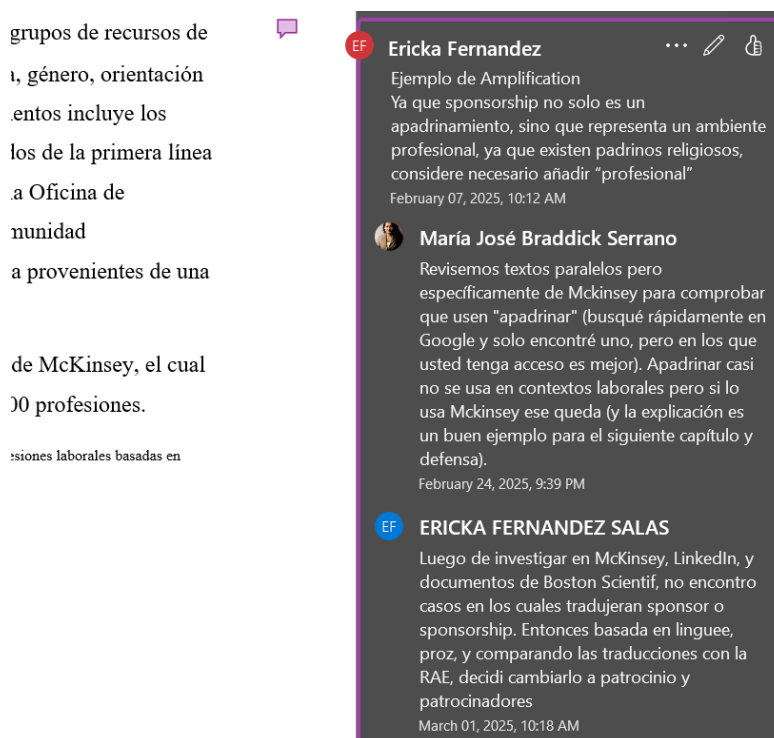
Additionally, to ensure consistency, parallelism, and accuracy within both translated documents, the analyst added to the glossaries all the significant terminology that was applied multiple times within the text, such as “sponsorship” from English-to-Spanish, which does not have a specific word or translation in Spanish, thus it needed investigation through parallel texts to find the accurate equivalence in a corporate context, which was “patrocinio” in this case. Other examples from English to Spanish are “parental leave” or “paid sick leave” which are terminology related to a corporate job, that might need further explanation for a person to apply the correct equivalent in the other language. Aside from that, for the Spanish-to-English glossary, terminology such as “trabajo de cuidado no remunerado” was a key point in the text, thus, to add its equivalent into a glossary and to keep using it within the whole translation, provided parallelism and consistency on the target text.

Combining these ideas, the investigator was able to develop two glossaries to portray and justify the usage of specialized equivalents, not only for Human rights-related terminology but also, for socio-economic related phrases that might need extra explanation. Moreover, even though the initial idea was to construct one bilingual glossary, the researcher decided to separate it into two, as even though both source texts have Human Rights and socio-economic-related topics, to maintain structure and sense, the glossary was divided to have one specific for English to Spanish, and another one for Spanish to English; which allowed the translator to be more specific on the terminology added and the relationship and format within both glossaries.

6.2.4 To evaluate the translated texts’ effectiveness in conveying the original message with cultural relevance and readability, contributing to develop proper awareness and promoting equitable access to information.

The last objective, in terms of effectiveness in conveying cultural relevance and readability, depended on the proper investigation completed by the researcher, as effectiveness can be only measured with experience on the different topics and equivalent terminology found through parallel texts. In the case of experience, even though the analyst is a person pursuing a translation degree and is not an expert, she did rely on an experienced person as a tutor for this investigation, who guided and advised her on the appropriate steps to follow, aiming to apply the most effective terminology within both target documents. Based on Toury's Norm-Based Analysis (1995), a student can meet with an expert in review or feedback sessions, to be helped or guided to recognize translation norms in the specialized field, to then make any needed adjustments to her work to fit the recommendations accordingly. Moreover, the investigator had a comment tracker with her tutor, applying the Think-Aloud Protocol (TAPs), in which using Microsoft Teams as a tool, they created a commenting and responding dynamically to gain insight into the decision-making process (View Image 1).

Image 1



For parallel texts, the investigator researched and reviewed other similar publications from McKinsey and other consulting companies like Boston Scientific and Delloite, which made public their papers through platforms like LinkedIn. In the case of glossaries and monolingual dictionaries, the analyst did multiple research on tools such as Linguee and

ProZ, which are professional glossaries online, together with glossaries published by other translator pursuers and investigators, as the one explained within Antecedents in Chapter I. Aside, for dictionaries, in aim to ensure the proper and coherent understanding of the specialized terminology, the investigator reviewed monolingual dictionaries like Merriam Webster for English terms, and *Diccionario de la Real Academia Española* for Spanish terms. Putting together the guidance from an experienced person, and the application of parallel texts and glossaries, the effectiveness of the text was able to improve within the editing process; but also, the researcher was able to observe and realize the importance that these tools can provide to develop proper awareness and help to promote equitable access to information for everyone.

6.3 Restatement of the Research Question

In the first Chapter of this investigation, a research question is stated: How to apply specialized Human Rights translation techniques that enhance accessibility, cultural sensitivity, and engagement with target audiences, such as Spanish speakers in the United States, and English speakers in Costa Rica? With this question, the investigator was looking for different techniques that allow her to find the most effective, coherent, natural, and culturally appropriate terminologies to transmit the message to the desired audiences. After deep research on past investigations, reviewing translation methods and procedures, multiple text analyses before and after translation, examination of parallel texts, and feedback and assessment from an experienced translator, the analyst was able to find an answer to this question. To reach a common ground on how to get the accessibility, cultural sensitivity, and engagement for the target audiences desired, the investigator can conclude that applying text analysis to find critical terminology, carrying out deep research on those terminologies, and relating their equivalents to the text using transposition and modulation techniques, connecting all with literal translation procedure, and finally, performing re-reading and edition on the target documents; all these make possible to present the most effective, coherent, natural, and culturally appropriate equivalent papers during translation process.

6.4 Unexpected Results

An unexpected result was to find that even though there is a belief that literal translation is not appropriate to apply and that it is “antinatural” within translation; during the

research analysis, it proved its effectiveness when translating specialized papers, as the procedure mostly applied on the translation was literal translation, only followed by transposition and modulation which allowed to fix syntactical differences between both languages, and arranged proper perspectives to meet naturality and coherence within the texts. These demonstrate, once again, that literal translation is an effective and approved technique to apply to specialized translations, even when the specialization might vary from one translation to another, this procedure has high effectiveness in giving accuracy and coherence.

6.5 Recommendations

To finalize this study, the researcher would like to provide some suggestions for future investigators on similar topics, students pursuing Translation specializations, specialized translators looking for parallel texts or antecedents, and even casual readers who want to learn more about specialized translation:

- First, as the source documents included specialized terminology, the investigator has to spend multiple days and weeks going through parallel texts and glossaries to understand and find equivalent terminologies that fit the proper meaning that the original text was intended to portray; but also, re-reading and comparing other translation and analyzing them to ensure comprehension and justification for equivalent application in the translation. However, nowadays, there are different tools that can simplify this process and save time for translators, such as CAT Tools (Computer-assisted Translation Tools), which in a matter of minutes can determine equivalent terms by searching in provided parallel texts and resources, without the translator doing the word-by-word reading and analysis. Because of these, my recommendation is for universities and any other institution which have a Translator Certification Program, to implement the use of CAT tools within their program, and add at least one course to the program, focused on teaching how to use CAT tools for translation, while also, showing its benefits and importance. In addition to taking into account that CAT Tools are a complement to save time, they do need the proper informational sources that the translator needs to provide to it.
- Second, as proven in this investigation, specialized translation is more common than people can think, and even though Human Rights specialization might seem as not

that common, it is implied in plenty of official or informative documents. Given the critical need for specialization in matters of Translation, another recommendation for universities and institutions with Translation Programs is to add to their program specific courses for specialization, even starting with medical, and legal will be a starting point; although, to go to more specific specializations might properly inform students on their options as translators, while, giving them the actual tools and skills to pursue these desired specializations, and focus their development in this path. Going more specific, I would suggest those institutions include medical and legal translation as basic specialization, and include more specific ones such as Human Rights, Sports, Business related, etc.

- Third, while going through text analysis and the whole translation process, the investigator finds out the importance of connecting with a Subject Matter Expert (S.M.E) to determine critical information, specifically employee benefits and how to advocate for their validity, or appropriate institutions to reach out for support when meeting inequality or unpaid conditions within the workplace. For this, it is strongly advised for translators to closely collaborate with experts in the field, thus, when they encounter difficulties understanding Human Rights terminology or any other specialty, they can consult the experts to significantly enhance the quality of the translation, while also saving time and stress on understanding technical or complex terminology. Moreover, through this collaboration with S.M.E.s the quality of the target paper will increase, as it improves both, consistency and accuracy within the translations. Together, this approach ensures that translated texts adhere to the highest standards of precision and readability and provide better results for the client's expectations.

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Annexes

Race in the workplace: the frontline experience

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For worker of color



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advancement form the front line



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Preface

Last year, we released *Race in the Workplace: The Black experience in the US private sector*, an in-depth look at the challenges Black workers face in corporate America.¹ The report sought to provide a fact base to help executives better understand these issues so they could develop and implement effective programs to support their Black colleagues.

This report builds on our previous work but shifts the focus to the experience of Asian, Black, and Latino employees on the front line—a segment of the workforce that has typically been disconnected from advancement opportunities. Even as companies elevated their diversity, equity, and inclusion (DEI) initiatives over the past several years in an effort to create a more welcoming, supportive workplace, these efforts often didn't extend to workers beyond corporate levels.

The front line—which makes up approximately 70 percent of the total US workforce, or 112 million workers—represents a tremendous but overlooked opportunity for corporations. Our research found that employees of color face an array of impediments to moving up the ladder. They are motivated to advance but lack opportunities for promotion. A majority report having no sponsors to provide support and guidance. And employees of color may not feel a sense of belonging and inclusion at their jobs, routinely feeling ignored and marginalized.

These sentiments matter because for too many workers of color, the front line is both a starting point and an end point in their career journey—a revolving door of jobs that don't offer

opportunities to advance. This report shines a light on the pathways from the front line to the middle class as well as on the skills that are the key to advancement.

Companies can step up to the responsibility to support frontline workers of color and increase opportunities to transition into higher-paying, more fulfilling jobs. The last chapter in this report offers steps companies could take to help enable their frontline workers to develop the necessary skills to pursue new roles.

We want to acknowledge that systemic racism represents an additional obstacle to frontline employees of color. Our research and analysis focused on the steps companies could take to improve outcomes for these employees. Addressing the impact of systemic racism requires system-level changes, which are beyond the scope of this report.

We are at the beginning of this conversation about the front line. More research needs to be conducted, such as quantifying how career advancement affects the overall job satisfaction, career prospects, and economic outlook of workers of color. In addition, analysis could explore the financial and business benefits for companies that improve the development, retention, and advancement of their frontline staff.

We hope this report provides a starting point for executives in considering opportunities to unlock the full potential of workers of color on the front line. Progress could help change the lives of millions of workers. But more than that, it's the right thing to do.

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¹ "Race in the workplace: The Black experience in the US private sector," McKinsey, February 21, 2021.

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The research analyzed overall employment data from 53 companies, including the overall employment and representation information those companies provided. We thank the 15,000 employees from these companies who participated in the experience surveys and focus groups. Participating companies represent many industries and include Bayer, Best Buy, Bloomin' Brands, BNY Mellon, Chevron, DaVita, Dell Technologies, Eaton, Google, Hess Corporation, Hilton, Impossible Foods, Marshfield Clinic Health System, McKinsey & Company, MetLife, Mondelez International, Neuberger Berman, NextRoll, The Procter & Gamble Company, Protolabs,

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We are grateful to the academic advisers who gave input into our work, including Dr. Jo-Ann Rolle, Dean of Business at Medgar Evers College; Dr. Betsey Stevenson, Professor of Economics and Public Policy at the University of Michigan Gerald R. Ford School of Public Policy; and Dr. Peter Q. Blair, Assistant Professor, Graduate School of Education, Harvard University.

The growing body of research on the workforce and inequality in America informed the development of this report. We have cited much of this work throughout the report but apologize for any important research we inadvertently overlooked.

Introduction: The frontline trap

The vast majority of Americans are introduced to the workforce through frontline jobs—whether waiting tables, stocking store shelves, or folding clothes. Today, approximately 70 percent of the US workforce is concentrated in frontline jobs.² However, there is an ambition gap: 70 percent of workers want to advance, but just one in four will.

A common misconception is that workers can move from an entry-level frontline job to the top of the corporate ladder. To be sure, examples do exist: the fast-food CEO who learned the ropes on the fryer, the package delivery driver who ascended to the C-suite, or the record company executive who started in the mail room. But these examples are not representative of the frontline experience.

Too often, frontline jobs are both a starting point and an end point for workers. The majority of frontline workers never move up the ladder: just 4 percent are promoted to entry-level corporate jobs.³ Instead, they cycle through a series of positions that represent lateral moves without

ever gaining the necessary skills or having the opportunity to advance. Workers of color are particularly likely to remain in frontline jobs.

To date, frontline roles have been largely disconnected from traditional corporate programs. Companies have focused employee initiatives—such as training and DEI programs—on employees at the corporate level. Companies have an opportunity to extend these programs to the front line to help restore trust, bridge the experience gap, and create a more equitable society.

This report seeks to shine a light on workers of color in the frontline workforce—the issues they face, their pathways to career advancement, and the actions that both workers and companies could take to open up these paths to a greater share of workers (see sidebar “About the research”). Improvements to career advancement could have a tremendous impact for millions of workers—on their lifetime earnings, advancement, and job experience.

About the research

This report draws on research and analysis comprising several different data sets.

The Employee Experience Survey and the Race in the Workplace 2022 Talent Pipeline, which includes McKinsey’s Inclusion Assessment, provided data about the experiences and perceptions of employees across several areas (such as sponsorship, mentorship, feedback, advancement, and employee resource groups) cut by demographic factors (such as age, race, gender, and sexual orientation). The full data set for the talent pipeline analysis includes input from 51 companies and covers an estimated four million employees from the front line to the executive level. These findings were augmented by data from the US Bureau of Labor Statistics, the American Community Survey, and more than 50 testimonials from frontline employees across different races.

To understand career progressions, we drew on McKinsey research that analyzed the job histories of 29 million people and more than 800 occupations.¹

¹ For more about our research on career progressions, see “Unlocking experience-based job progressions for millions of workers,” McKinsey, June 2, 2021.

² McKinsey Analysis based on Bureau of Labor Statistics, 2019 data.

³ McKinsey, Race in the Workplace 2022 Talent Pipeline analysis; 51 participating companies, four million employees.

01



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The frontline experience for workers of color

The front line is a vital part of nearly all sectors of the economy.

These workers serve as the public face of many organizations and make tremendous contributions to the US economy. Frontline workers in industries from healthcare to transportation and logistics to foodservice carried the nation through the height of the pandemic in the United States. Yet they also experienced the greatest hardship from economic disruption.

Despite their importance, these workers are often devalued by business and society. Many companies don't extend programs promoting professional development and career advancement to the front line. It's little wonder that frontline employees reported not feeling connected to their organization, supported by their managers, and optimistic about their career prospects.

Workers of color, who are overrepresented in the US frontline workforce, feel these challenges more acutely than their White counterparts. At many companies, frontline roles are a revolving door with low pay and little advancement, leaving workers of color without a path to move up the ladder. As a result, more employees of color are in roles with lower job quality (for example, jobs that lack healthcare benefits or don't pay a living wage⁴). They have less confidence that their organization will be fair and transparent, are less likely to have sponsors to help guide their career, and have less access to opportunities to advance. The prevalence of bias in the workplace frequently leaves workers of color feeling isolated and at a disadvantage.

Career advancement and economic mobility are possible but only for a segment: just 30 percent of workers will move to a higher-income quintile over

the course of their careers.⁵ Given that people of color make up a majority of frontline workers, that leaves the middle class⁶ beyond their reach.

Gaining an in-depth understanding of the frontline workforce and experience is a critical step toward improving outcomes for all frontline workers.

Know your front line

With 112 million workers, the frontline workforce is massive but not a monolith. Frontline professionals (for example, school teachers and registered nurses) number 17 million workers who earn an average annual salary of \$54,000.⁷ Frontline hourly and salaried roles (such as retail salespeople, cooks, and store managers) are filled by 95 million workers who earn an average annual income of \$33,000. (For more detail, see sidebar "Defining the front line.") This report is primarily focused on lower-earning frontline hourly and salaried workers rather than frontline professionals.

A closer look at the demographics⁸ of the frontline hourly and salaried workforce demonstrates the untapped potential of its workforce:

- 29 percent of frontline workers are concentrated in ten occupations.
- 78 percent do not have a four-year college degree.
- Only 20 percent of frontline workers are under 25 years old.
- 42 percent of the front line are workers of color.
- 70-plus percent of Black and Latino workers are in frontline roles (Exhibit 1).

⁴ Marcela Escobar, "6 job quality metrics every company should know," Brookings Institution, October 27, 2021.

⁵ "Human capital at work: The value of experience," McKinsey Global Institute, June 2, 2022. Lifetime earnings are the sum of nominal salaries over an individual's 30-year working life.

⁶ Pew Research Center defines the middle class as households making "two-thirds to double America's median income." That adds up to an income range of about \$30,000 to \$90,000 for single Americans in 2020 dollars. For more, see Jesse Bennett, Richard Fry, and Rakesh Kochhar, "Are you in the American middle class? Find out with our income calculator," Pew Research Center, July 23, 2020.

⁷ McKinsey analysis based on Bureau of Labor Statistics, 2019.

⁸ American Community Survey, US Census Bureau, accessed July 27, 2022; Moody's Analytics; "Occupational employment and wage statistics," US Bureau of Labor Statistics, accessed July 27, 2022; "Quarterly census of employment and wages," US Bureau of Labor Statistics, accessed July 27, 2022.

Frontline workers are often economically insecure, defined by PolicyLink as 200 percent of the federal poverty line.⁹ This equates to an annual income of \$27,180 and \$46,060 for single- and

three-person households, respectively. One in two frontline workers makes less than \$30,000 a year; just 15 percent make more than \$50,000.

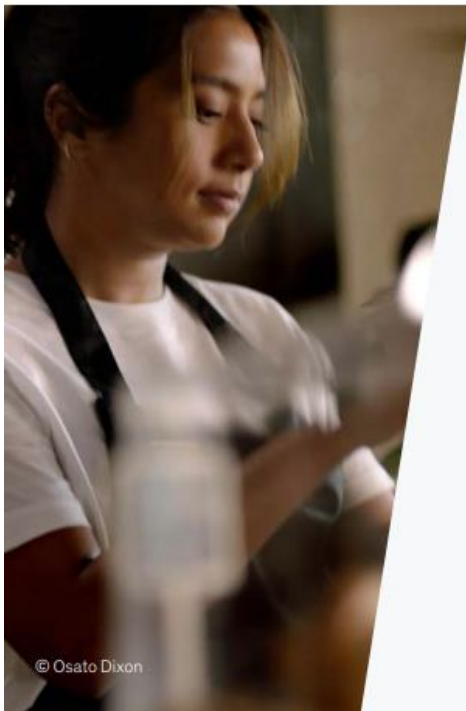
Exhibit 1

More than 70 percent of US Black and Latino workers hold frontline jobs.

Racial representation in US workforce, by role, %



¹ Frontline workers with advanced degrees (eg, doctors).
Source: Moody's Analytics; United States Census Bureau American Community Survey; US Bureau of Labor Statistics



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Defining the front line

The front line encompasses multiple roles with varying levels of income and paths to advancement. For this report, we define frontline workers as those who work directly with customers or are directly involved in making or selling a product or providing a service (such as cashiers, salespeople, and housekeeping staff). These positions do not require advanced technical skills or credentials. Although in some circumstances professionals with advanced degrees (such as doctors, nurses, and teachers) are considered frontline workers, we are excluding them from this report because their experiences differ considerably from frontline hourly and salaried workers.

The nonprofessional front line can be divided into hourly roles (for example, retail salespersons, cooks, and drivers) and salaried positions (for example, facilities managers).

⁹ *Advancing frontline employees of color: Innovating for competitive advantage in America's frontline workforce*, FSG and PolicyLink, January 2020; "HHS poverty guidelines for 2022," Office of the Assistant Secretary for Planning and Evaluation, US Department of Health and Human Services, January 12, 2022.

Frontline workers have not benefited from corporate America's DEI investments

As past McKinsey reports have detailed, workers at all levels endure challenges on the job, and this is particularly true for people of color.¹⁰ Yet our research found employees in frontline roles report the worst experience. Frontline hourly employees are nearly 20 percent less likely than corporate employees to believe that DEI policies are effective (Exhibit 2). Just one-third of workers in the bottom 10 percent of income had jobs with paid sick leave.¹¹ In addition, 45 percent of hourly employees don't believe their company encourages them to take advantage of work-life

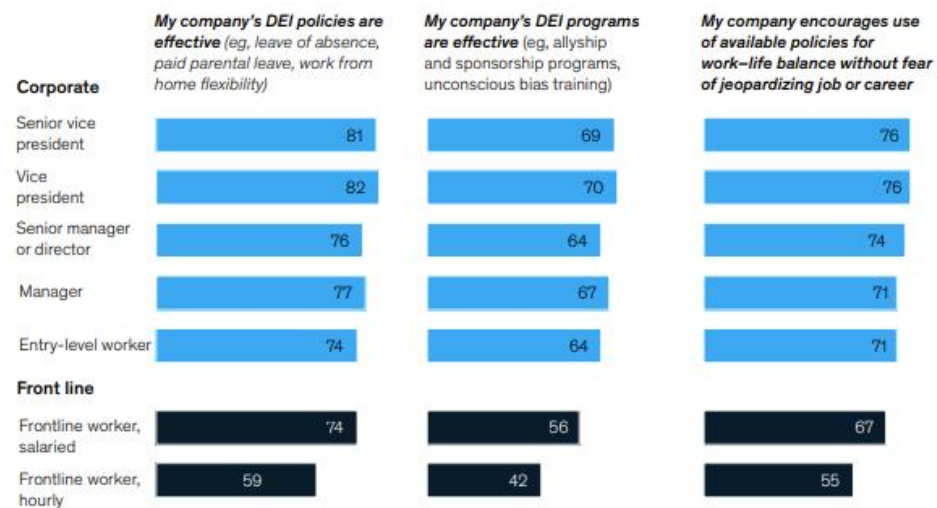
policies (for example, leave of absence and parental leave) without jeopardizing their employment or career advancement.

In other words, the very employees who could benefit the most from DEI policies and programs have little faith in their organization's ability to deliver. In our survey, employees of color associated words such as "inadequate," "mistaken," and "minimal" with their company's DEI actions. And since a majority of workers of color are concentrated in frontline positions, this disconnect represents a huge missed opportunity on the part of corporate America to its entire workforce.

Exhibit 2

US companies' diversity, equity, and inclusion programs aren't reaching the frontline hourly workforce, compared with other groups.

Effectiveness of company diversity, equity, and inclusion (DEI) initiatives, by role, % of respondents¹



¹ n = 15,040.
Source: McKinsey Race in the Workplace Survey, 2022

¹⁰ "Race in the workplace," February 21, 2021.
¹¹ "Employee benefits in the United States," Bureau of Labor Statistics, March 2019.

Frontline hourly workers report a pervasive lack of fairness in promotions

An organization's commitment to transparent performance reviews and promotions is critical to instill a sense of fairness among the workforce.¹² Our research explored the perceptions of frontline hourly employees regarding fairness and transparency in promotions. They are more likely than their salaried peers to feel their organization is inconsistent when it comes to promoting employees on merit and performance (Exhibit 3). Just 39 percent of hourly respondents believe their employer takes an objective, empirical view of performance and promotion. This lack of fairness underscores that investments in frontline workers have been ineffective and insufficient to date.

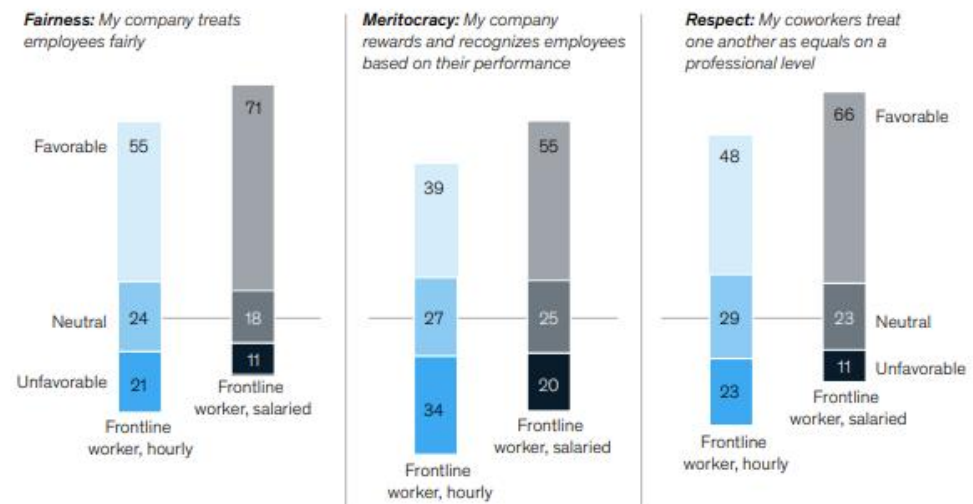
Our analysis suggests companies promote just 4 percent of frontline workers to corporate roles. A couple of factors contribute to this pattern. First, companies typically do not create these paths, looking instead to different candidate pools to fill corporate roles. Second, many companies do not have training and development programs or people processes in place for their frontline workers, so high-potential workers are not on the radar to help develop skills that might qualify them for entry-level corporate jobs.

Worker perceptions of enterprise inclusion—the extent to which an organization's systems foster a welcoming and fair environment for all workers to be themselves—can affect the degree to which they feel valued and empowered to pursue advancement opportunities. Hourly employees also perceive less willingness from leaders and coworkers to treat others with mutual respect and be inclusive of their opinions.

Exhibit 3

US frontline employees paid hourly report inconsistencies in recognition and promotion based on merit and performance.

US employee opinion of company fairness, meritocracy, and respect, by role, % of respondents¹



¹ Frontline worker, hourly, n = 10,380; frontline worker, salaried, n = 7,019. Source: McKinsey Inclusion Assessment Survey 2020–22; McKinsey analysis (see technical appendix for more information on the survey and analysis methodology)

¹² Bryan Hancock, Elizabeth Hioe, and Bill Schaninger, "The fairness factor in performance management," *McKinsey Quarterly*, April 5, 2018.



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“ When I first got hired, they said that there are opportunities to move up, but there hasn't been a whole lot of support. They kind of pick and choose who they want to be the next manager, who they want to promote, depending on how they feel about you. I guess some of it has to do with performance, but mostly, it seems to be somewhat related to favoritism. ”

23-year-old Black man, tour guide

“ I hear some of the talk that I need to hear, but I'm just not seeing the actions needed to help. We sit down and do one-on-ones and yearly feedback and talk through performance reviews, and you hear, 'This is what we are going to need, and this is how we're going to get you to the next level.' But it's just not happening. I feel like I contribute to my part of it, but I'm just not seeing that come through on ... where they would contribute. ”

50-year-old Black woman, customer service supervisor

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Race in the workplace: The frontline experience

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Frontline workers of color want to advance but lack access to opportunities

Our analysis also revealed a sizable gap between the desire of employees of color to advance and the availability of opportunities to do so (Exhibit 4). White frontline employees were most likely to report receiving advancement opportunities despite stating the lowest desire for promotion. By contrast, Latino employees experienced a 30-percentage-point spread between the desire

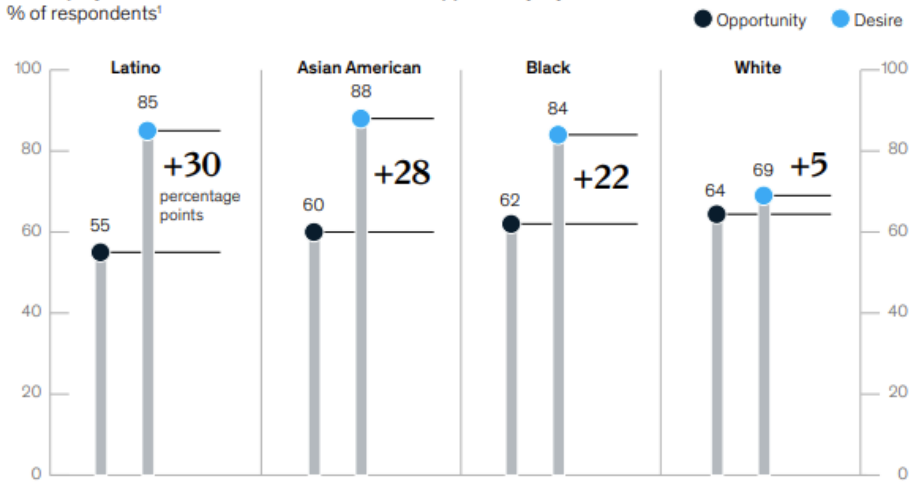
to be promoted and the opportunity to advance, six times greater than that of White employees. Asian and Black frontline employees reported gaps that were only slightly narrower compared with their Latino counterparts.

This lack of advancement opportunities weighs heavily on workers of color. Previous McKinsey research has found that limited career development and advancement is the top reason Black and Asian frontline workers plan to leave their companies.¹³

Exhibit 4

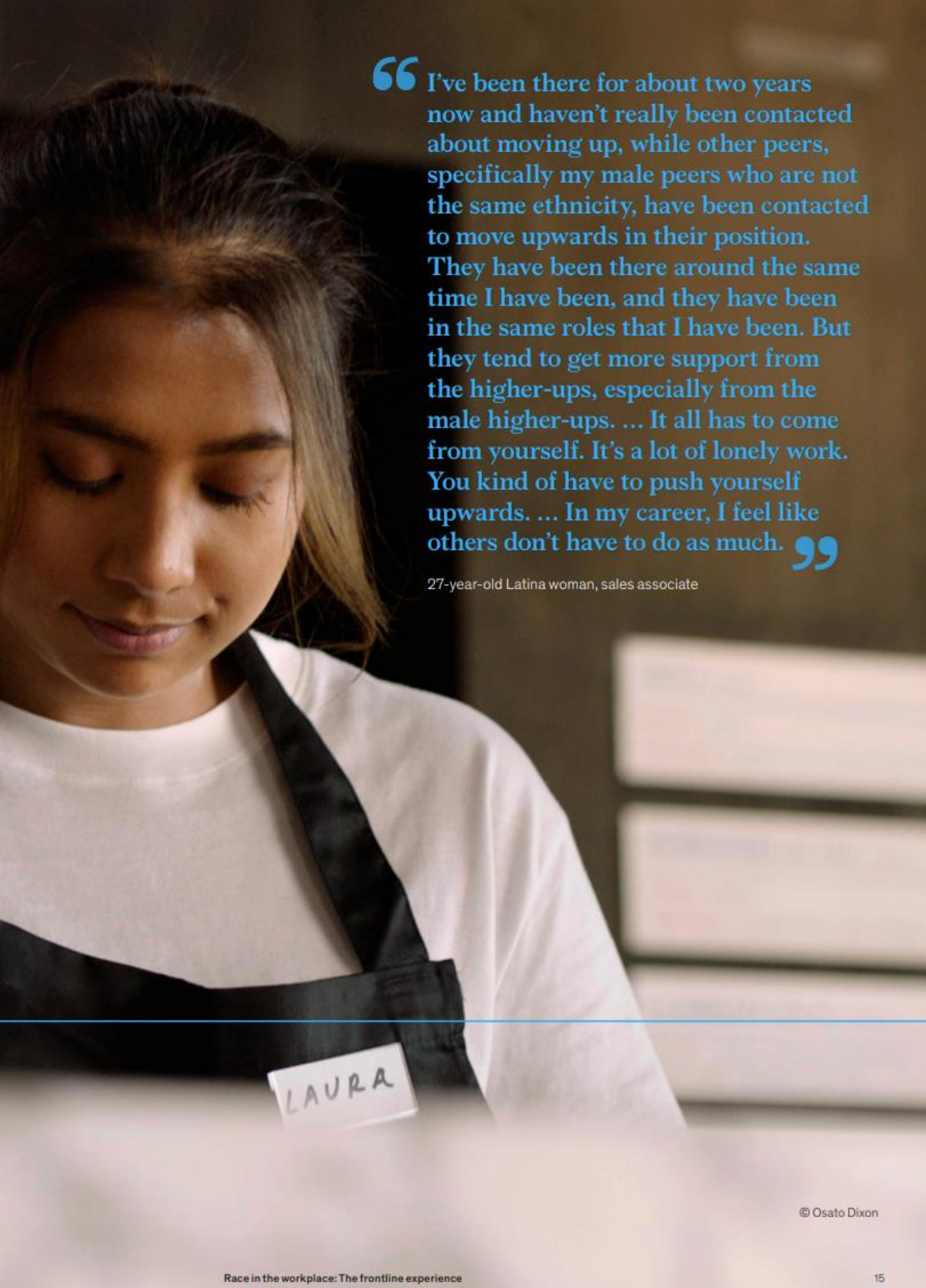
Frontline workers of color receive fewer opportunities despite a higher desire to advance.

US employees' career advancement desire and opportunity, by race, % of respondents¹



¹ Questions: Do you have the desire to be promoted to a higher level within your company? In the past year, have you been approached by someone more senior for any of the following: new, challenging assignment or project; skill training program; promotion; other; management training? n = 4,798. Source: McKinsey Race in the Workplace Survey, 2022

¹³ McKinsey's Great Attrition, Great Attraction 2.0 Global Survey, 2022.



“ I’ve been there for about two years now and haven’t really been contacted about moving up, while other peers, specifically my male peers who are not the same ethnicity, have been contacted to move upwards in their position. They have been there around the same time I have been, and they have been in the same roles that I have been. But they tend to get more support from the higher-ups, especially from the male higher-ups. ... It all has to come from yourself. It’s a lot of lonely work. You kind of have to push yourself upwards. ... In my career, I feel like others don’t have to do as much. ”

27-year-old Latina woman, sales associate

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Asian workers: A tale of divergent experiences

Fast facts¹

5 percent of
frontline workforce

Top industries:
accommodation and
foodservice, manufacturing,
and healthcare

At first glance, Asian frontline workers appear to be poised for rapid advancement. They have the highest levels of education: 21 percent have earned at least a bachelor's degree, compared with 16 percent of White workers, 10 percent of Black workers, and 8 percent of Latino workers. They also report higher levels of inclusion than other workers of color and are more likely to believe their workplace is fair and impartial.

Yet despite these advantages, Asians must overcome many of the same challenges as other workers of color: They consistently make less money than their White peers for the same job. They don't feel supported, with more than half lacking a sponsor. And they report the highest levels of burnout among all frontline employees.

Moreover, Asian workers are often stereotyped as being diligent and quiet, perceptions that could be a factor preventing them from moving into management positions.² They experience a steady decline in representation by level, falling from 9 percent of frontline hourly roles to 5 percent of salaried positions.

The picture is complicated further by the fact that Asian workers represent a diverse array of nationalities and subgroups, each with its own distinct experience. For example, Southeast Asians report some of the lowest inclusion scores, while East and South Asians report among the highest.

Companies seeking to devise effective programs and provide support for Asian workers must dig beneath the top-line classifications to truly understand the specific challenges each subgroup faces.

¹ Bureau of Labor Statistics (OES and OCEW); Moody's Analytics; American Community Survey, 2019.

² Adeel Hassan, "Confronting Asian-American stereotypes," *New York Times*, June 23, 2018.

Held back by a perceived lack of soft skills

“With my current company, I've been in sales for six years and three different functions of sales. I wanted to jump into a sales leader role—that was what I was originally developing for—but for some reason I just could not get a fair shake, and I thought that I was missing leadership abilities, right? Because that's kind of what they tell you, and sometimes they use that to block a job change when you get the qualification that they're asking for.

The interesting thing is a lot of people look at me and they decide that Asian females are not good at sales. No matter how many years of successful experience I've had before and in my company currently, all they see is, well, she's in operations now, she's too 'black and white' to understand sales. And I think it's also just being an Asian woman: if I do not act in the way they expect me to—to be nice and docile—I get blacklisted.

I'm trying to break that bamboo ceiling to help other people who look like me get through. And I would say I'm probably one of the few Southeast Asian women in leadership positions here.”

38-year-old Asian woman, sales manager

© tdub303/Getty Images



Workers of color are overrepresented in the lowest-paying frontline industries

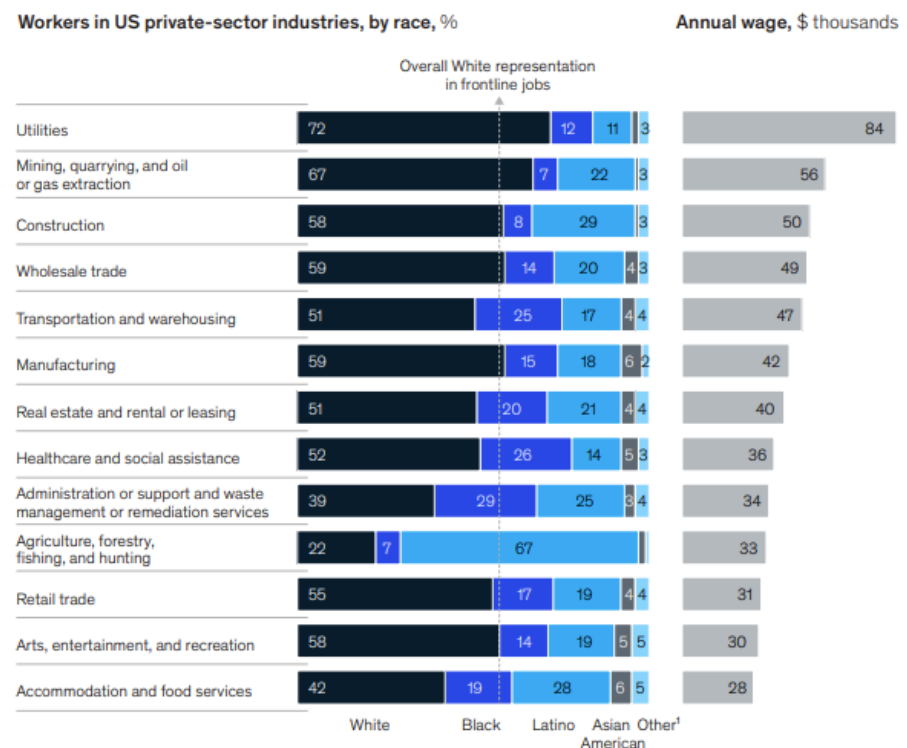
The pay for frontline roles varies significantly by industry. Our analysis found workers of color are significantly overrepresented in industries with the lowest-paying frontline roles (Exhibit 5). Consider that workers of color account for 58 percent of food and accommodation services, an industry with an average annual salary

of just \$28,000. By contrast, they make up just 28 percent of frontline jobs in utilities, which pay around \$84,000 a year. On average, Black and Latino frontline workers make 20 percent less than White frontline workers.

This distribution has a direct bearing on the financial prospects of frontline workers of color as well as on opportunities to advance their careers and obtain new skills.

Exhibit 5

Workers of color are underrepresented in the US industries with the highest-paying frontline roles.



Note: Figures may not sum to 100%, because of rounding.
¹ Native Hawaiian or Pacific Islander, Indigenous (eg, Aboriginal, First Peoples, Native American), and people who identify as two or more races.
 Source: US Bureau of Labor Statistics Occupational Employment and Wage Statistics Survey, May 2021; US Equal Employment Opportunity Commission EEO-1 Survey, 2018

Frontline workers of color see representation fall from hourly to salaried roles

In our participating companies, employees of color were overrepresented in frontline hourly roles and were 1.4 times less likely than White employees to advance into salaried roles.¹⁴ The trajectory differs by race—Asian employees see their share decline steadily from hourly to hourly manager to salaried roles, while Latino employees experience

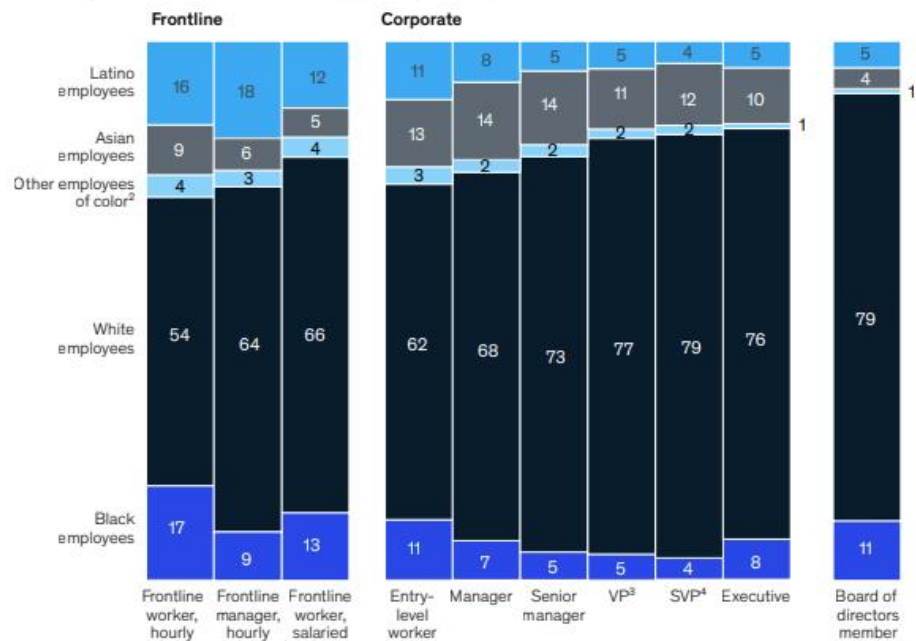
a small bump at the hourly manager level before declining significantly at the next rung (Exhibit 6). The representation of employees of color in corporate roles largely draws from a different pool of candidates.¹⁵

Overall, people of color see their share of frontline roles drop ten percentage points from hourly to salaried roles. Since frontline salaried roles are more likely to pay a living wage and have better benefits, they are more sustainable jobs.

Exhibit 6


The representation gap for US frontline employees of color is greatest when moving from hourly roles to frontline manager and frontline salaried roles.

Racial representation in US workforce, by role, % of respondents¹



Note: Figures may not sum to 100%, because of rounding; average representation calculated as an unweighted average of representation by demographic group at participating companies.
¹ June 2021 snapshot, aggregated data across 51 companies and >4 million employees. Average of 51 companies' pipeline shares (1 company = weight of 1); frontline manager, hourly, made up of 15 companies.
² Native Hawaiian or Pacific Islander, Indigenous (eg, Aboriginal, First Peoples, Native American), and people who identify as two or more races.
³ Vice president.
⁴ Senior vice president.
 Source: McKinsey Race in the Workplace Survey, 2022; McKinsey analysis (see technical appendix for more information on the analysis methodology)

¹⁴ Every level above hourly manager is a salaried role.
¹⁵ For more detail about corporate representation, see "Race in the workplace," February 21, 2021.



“ I have noticed that there are not many minorities in any position except for the entry-level positions. I know some minorities have tried to go into management; they’ve stayed for a short time and then left. I’m not sure how that might affect me going forward, but I know there may be some barriers to entry to management and upper management. ”

23-year-old Black man, tour guide

© Osato Dixon

Workers of color are held back by low levels of sponsorship

The level of support that workers receive on the job can have a direct impact on their career prospects. A mentor shares their knowledge, wisdom, and advice with more junior colleagues. A sponsor takes an active role in creating opportunities for more junior workers. They can also provide visibility into projects, job opportunities, and promotions and create a sense of community and belonging.

Our research found that more than half of all frontline employees of color have at least one mentor in the workplace—in line with their White peers. But these relationships aren't translating into sponsorships. Black and Latino frontline employees report the lowest levels of sponsorship: the majority (nearly six in ten) have no sponsor

at all, with Black frontline employees seeing especially low levels (Exhibit 7).

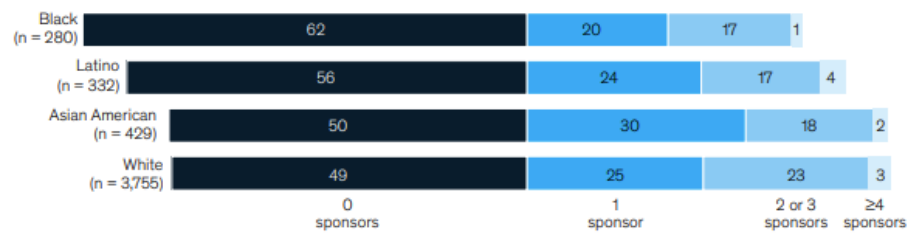
This pattern appears to have a direct impact on career advancement. Our analysis found that employees are five times more likely to get a promotion if they have four or more sponsors. In effect, every sponsor translates to a roughly 10 percent increase in an employee's chance of getting a promotion.

Sponsorship is also an important contributor to inclusion¹⁶ and is an integral way for workers to receive coaching and direction on day-to-day skill development. By helping workers gain on-the-job experience, sponsors contribute to the earning potential of frontline workers with lower levels of education, especially in occupation categories such as agriculture and food service.

Exhibit 7

In US frontline jobs, Black and Latino workers are less likely than White and Asian American workers to have sponsors.

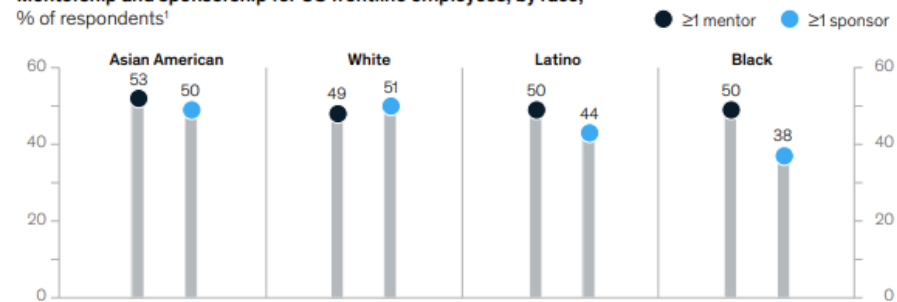
Number of sponsors for US frontline employees, by race, % of respondents¹



Note: Figures may not sum to 100%, because of rounding.
¹ Question: How many sponsors do you currently have? n = 4,796.
 Source: McKinsey Race in the Workplace Survey, 2022

For US frontline Black and Latino employees, mentorship is not translating to sponsorship.

Mentorship and sponsorship for US frontline employees, by race, % of respondents¹



¹ Questions: How many mentors do you currently have? How many sponsors do you currently have? n = 4,796.
 Source: McKinsey Race in the Workplace Survey, 2022

¹⁶ "Understanding organizational barriers to a more inclusive workplace," McKinsey, June 23, 2020.

Latino workers: Resilience in the face of challenges

Fast facts

14 percent of
frontline workforce

Top industries: agriculture,
construction, and forestry,
fishing, and hunting

Latino workers, who are more likely than any other race to be in frontline roles, face several daunting challenges when it comes to careers. They have the second lowest wages of all groups, earning 22 percent less than White frontline workers, in part because of the occupations in which they are concentrated. They are the largest immigrant group of any race, with 85 percent of immigrants on the front line. They also have the lowest education levels of any race: just 36 percent have some postsecondary schooling.

Perhaps unsurprisingly, Latino frontline employees don't feel included or supported on the job: they are significantly less likely than White employees to believe their employer allows self-expression and has adequate protective mechanisms in place. In greater numbers than other groups, Latino frontline employees cite a lack of support for employee well-being as a key reason for leaving their jobs. They also report the second-lowest level of sponsorship, a crucial element in advancement.

Despite these challenges, Latino employees in our sample have achieved a higher share of promotions from frontline jobs to entry-level corporate roles than other employees of color. They also report levels in inclusiveness in line with their White peers when they are promoted to corporate roles.

¹ American Community Survey, US Census Bureau, accessed July 27, 2022.

Misgivings about career advancement

“I've been with this company for almost two years. I actually entered as a back-end team member but made the transition to the sales floor a few months ago. I was asked a couple times to be a supervisor after my one-year mark, and I turned down the position a few times before deciding to take it. I thought that I would need experience with some form of leadership and decided to finally say yes.

My manager has talked to me again about moving up in a year or so, but I don't feel supported at all in my position. As the manager was telling me this news, I was just like, 'If I feel like I'm not supported now, and I don't have the right tools as a supervisor, I doubt you guys will give me the right tools for a role with more responsibilities.'

The only way I see myself advancing would be a lot of sacrificing. And maybe they think that as a Hispanic person, I'd be willing to do that because I want to move up. But to be honest, it's not worth my mental health.

The store manager is Hispanic—she's an immigrant. And it's great, because she started as a cashier and made her way up. She's a store manager now after 13 years at the company. That's fantastic. That's great. But at the same time, I see so much sacrifice, I see so many tears, I can see a lot of pain—and I don't want that for myself. ”

23-year-old Latina woman, cashier

© Osato Dixon



“ While initially there is a big support and push for minorities to try out for a different career and advancement, when it really comes to leadership opportunities beyond the initial hiring process and mentorship ... it’s just not there for ethnic minorities. ”

40-year-old Latino man, bank teller

“ How supported do I feel in my job field? Not that much. I kind of feel like I’m on an island all by myself. ... I don’t really have a lot of leaders around me to follow their example. ”

43-year-old Black man, customer sales rep



© Sam Diephuis/Getty Images

Frontline workers of color do not feel included in the workplace

Inclusion consists of behaviors such as allyship, mutual respect, and advocacy as well as conditions such as shared prosperity and fair participation. Previous McKinsey research has highlighted the role of inclusion in increasing support for colleagues, employee retention, and favorable views of the organization, among other benefits.¹⁷

Frontline hourly employees report the lowest overall feelings of inclusion of all employees in the workforce, and differences in inclusion emerge as they climb the corporate ladder (Exhibit 8). While all groups feel more connected at higher levels of their organization, Black employees experience lower inclusion than their peers at most levels. This pattern essentially sets up a no-win situation for Black frontline workers: shared stressors in the front line or feelings of isolation as they move up the ladder.

Exhibit 8

Differences in inclusion are generally felt more strongly as US employees climb the corporate ladder, especially for Black employees.

US employee inclusion, by race and role, inclusion score (<50 = very low; ≥80 = very high)¹



¹ n = 39,833; excludes respondents selecting "Other" as their racial group. Source: McKinsey Inclusion Assessment Survey 2020–22; McKinsey analysis (see technical appendix for more information on the survey and analysis methodology)

¹⁷ "Race in the workplace," February 21, 2021.

The Black frontline experience: Overcoming the trust deficit

Fast facts

13 percent of the frontline workforce

Top industries: healthcare support, protective services, and community and social services

Our Race in the Workplace Survey found that among all frontline staff, Black workers have the largest enterprise trust deficit—defined as a gap in perception on attributes such as acceptance, fairness, and authenticity.

This trust deficit affects nearly every facet of the Black frontline experience. For example, Black workers report the highest job satisfaction and lowest intention to leave. Yet they also experience the highest attrition rates. What is causing them to look to other organizations for opportunities? For many, it's a lack of career development and advancement potential. Fully 84 percent of Black employees indicated a desire to be promoted, but just 62 percent perceived an opportunity to advance.

They also don't view their work environment as a meritocracy (Exhibit 9). A contributing factor is that Black frontline workers earn on average 25 percent less than their White peers.

The lack of trust manifests itself in numerous ways. Black workers are less likely to feel supported, encouraged, and treated as professional equals by their peers. Fifty-one percent of Black employees have at least one mentor, but just 38 percent said they have at least one sponsor, meaning many Black workers lack valuable direction and support on career paths and development opportunities. In addition, Black frontline employees report feeling included in the workplace less than any other racial group.

As poor as the experience is for Black frontline workers, it also represents a high-water mark. As they move up the ladder, they report feeling less included and supported than their peers.

Struggling against entrenched perceptions

“ I feel that my race affects my trajectory in my company. While there are opportunities at times for advancement, a lot of times I am overlooked. My peers often doubt me, even though I share the same qualifications as everyone else. My skill set is judged, my professional judgment is in question a lot of times, and this reflects how the patients view me as a medical professional there to take care of them. It makes it really difficult.

I feel the people of other races at the company don't have to deal with this. In the same sense, it makes me work and do my job ten times harder. I take what I do very seriously, and this is something that Black workers deal with in the workplace setting—but you still have a job to provide.

I relate well to my patients and to their families, and I communicate well with the doctors. Yet I still haven't been offered promotions—even when I've asked for opportunities. I'm not sure of the bottom-line details or why it hasn't happened. I just know I come and do my job to the best of my capabilities despite everything going on around me. ”

42-year-old Black woman, registered nurse

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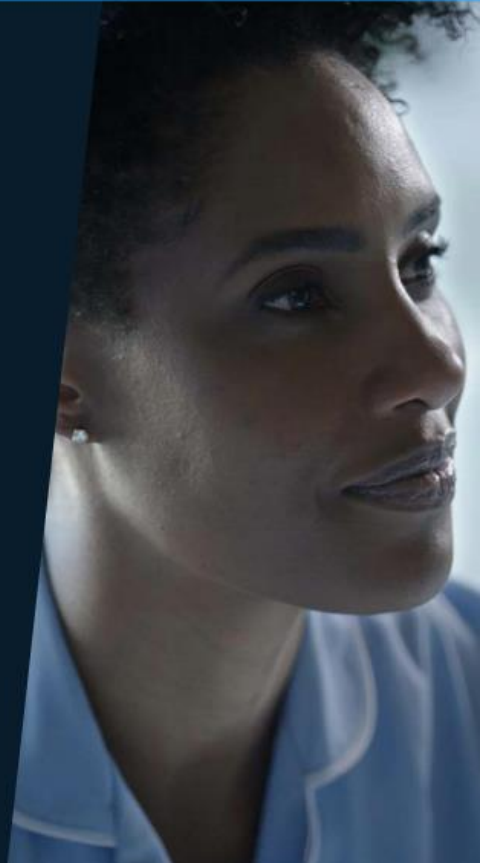
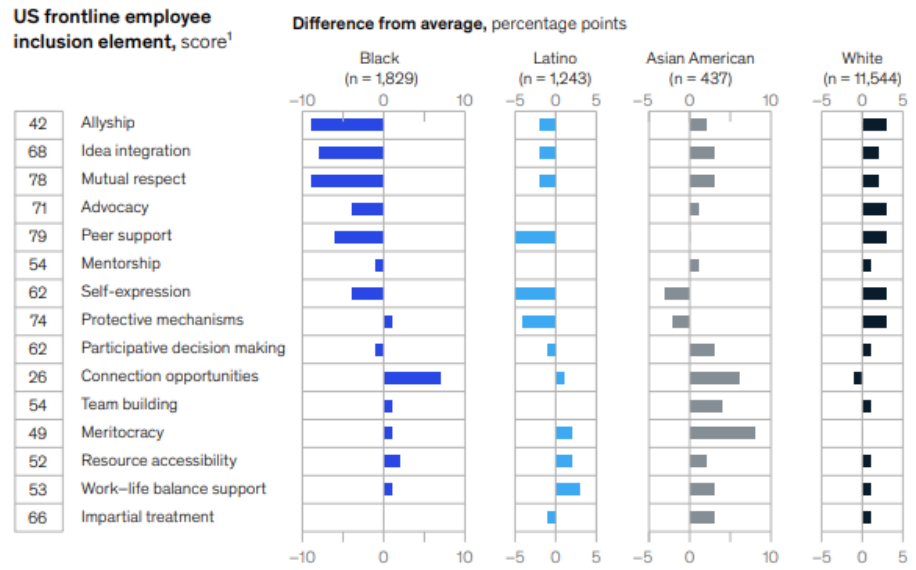


Exhibit 9

Each racial group in US frontline jobs experiences different inclusion gaps.



¹ Hourly and salaried employees. Score classification: very low, <50; low, 50–59; moderate, 60–69; high, 70–79; very high, ≥80. Source: McKinsey Inclusion Assessment Survey 2020–22; McKinsey analysis (see technical appendix for more information on the survey and analysis methodology)

02



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Creating a pathway for advancement from the front line

Career advancement often requires much more than hard work alone. In fact, the best way for workers to advance is by moving from one job to another in an upward progression. The accumulation of skills and experience along the way can open up new opportunities.

Our analysis assessed occupations by their value and role in career advancement and identified concrete pathways for advancement. We found it is possible for workers to move from initial frontline jobs and the accompanying economic insecurity to roles with middle-class incomes and better career prospects.

The existence of these pathways should be cause for optimism. They must also overcome entrenched biases within the workplace that limit opportunities and impede their advancement. For instance, many of the roles with pathways lean more on interpersonal skills than on formal education. Since the assessment of these skills is inherently more subjective, it allows bias to have a greater influence on promotion decisions.

Charting the progression from the front line to better-paying jobs

A recent McKinsey research effort sought to identify the progression of frontline workers as well as the attributes and experiences that enable their advancement.¹⁸ We analyzed historical job progressions of four million workers without four-year degrees, also known as individuals skilled through alternative routes (STARs),¹⁹ who successfully transitioned from low- to higher-wage occupations and identified the jobs that created pathways to higher-paying roles. The career journey was segmented into five job categories²⁰:

- **Origin occupations** are frontline jobs with pay of less than \$37,000. Wait staff, retail salespeople, and maintenance workers are common Origin roles.

- **Mid-wage Origin roles**, such as automotive master mechanics and chefs provide a small increase in pay (\$37,000–\$42,000) for workers who transition from Origin roles.
- **Roles in Historical Adjacencies**, such as cargo and freight agents, electricians, and nurse practitioners, offer workers a bump in pay (to more than \$42,000), but they have limited success as pathways to higher-wage occupations.
- **Gateway occupations** give workers the opportunity to build skills and experience and earn more than \$42,000 a year. Gateway roles include food service managers, vocational nurses, and radiologic assistants.
- **Target occupations** are jobs with middle to higher wages (more than \$42,000) that are resilient to automation. Companies often hire for these roles based on job experience, not just credentials. Examples include sales managers, social workers, and critical-care nurses.

For the purposes of this report, we refer to mid-wage Origin, Gateway, and Historical Adjacencies occupations as “Next” jobs—that is, jobs representing a positive move for frontline workers in Origin roles. We consider Gateway jobs the most valuable because they enable workers to transition to Target occupations. Mid-wage Origin and Historical Adjacencies occupations are still considered positive steps because they offer increased pay, but they don’t offer as much opportunity to progress to Target occupations.

The progression from Gateway to Target roles represents a clear path to the middle class—better-paying, higher-quality jobs and the greater economic security and career opportunities that come with them.

¹⁸ “Unlocking experience-based job progressions for millions of workers,” McKinsey, June 2, 2021.

¹⁹ “STARs: Skilled through alternative routes,” Opportunity@Work, accessed July 28, 2022.

²⁰ Most frontline jobs are concentrated in the Origin and Mid-wage Origins categories, but about 20 percent are Target jobs.

“ I started off as a caregiver with no certification, and then that progressed into getting a certified nursing assistant certificate. The next step is to go for a full RN. ”

22-year-old Latina, certified nursing assistant



© wagnerokasaki/Getty Images

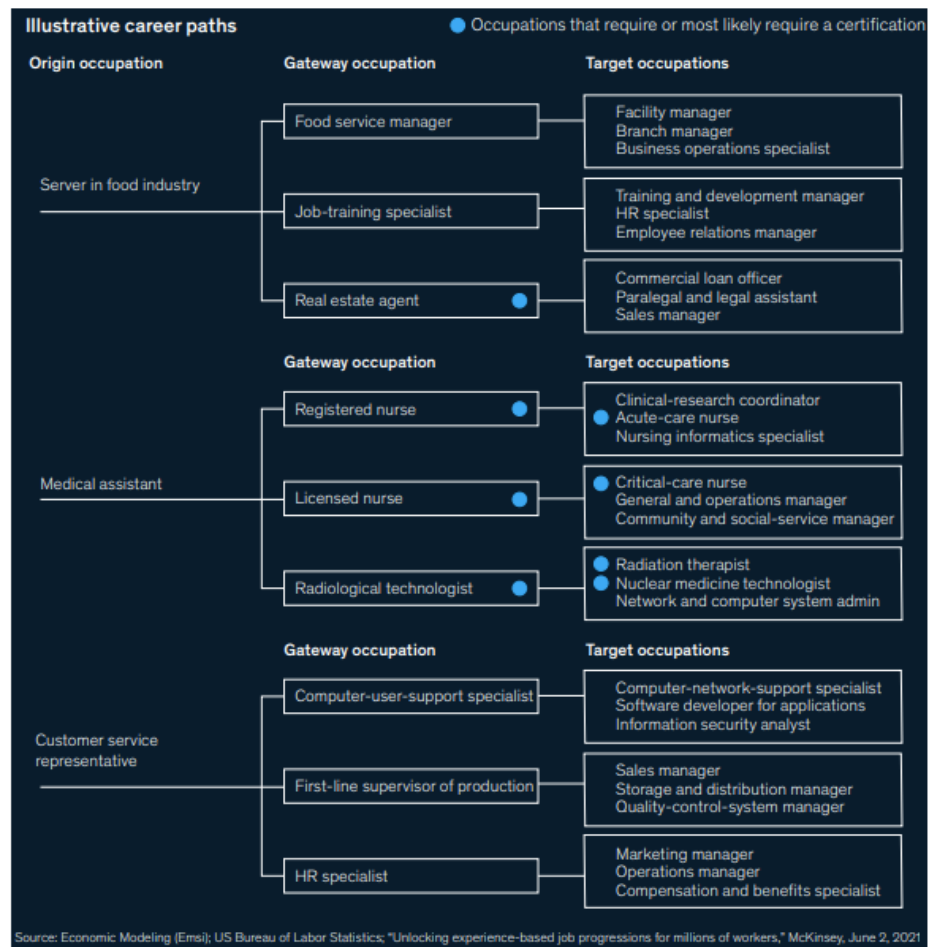
Select occupations have the potential to accelerate career advancement

Our analysis identified 77 Gateway occupations that are especially effective at unlocking job progressions into Target jobs (Exhibit 10). These roles can help workers develop new skills (for example, a customer service representative moving into an IT role) or broaden existing skills gained through work experience (such

as a medical assistant moving into a more advanced role in healthcare). Although some Gateway occupations require certification, many do not. These pathways can enable frontline workers to draw on their work experience and accumulated skills to progress. Gateway roles are crucial because they have the potential to provide frontline workers with a clear path to the middle class.

Exhibit 10

Gateway occupations offer multiple paths to target roles.





“ I have been working in the medical field for the past 13 years. I started as a potwasher, then upgraded to a housekeeper, then upgraded to shipping and receiving clerk, and now I am a district environmental service specialist. ”

33-year-old Black man, environmental service worker

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White workers are disproportionately represented in Next jobs

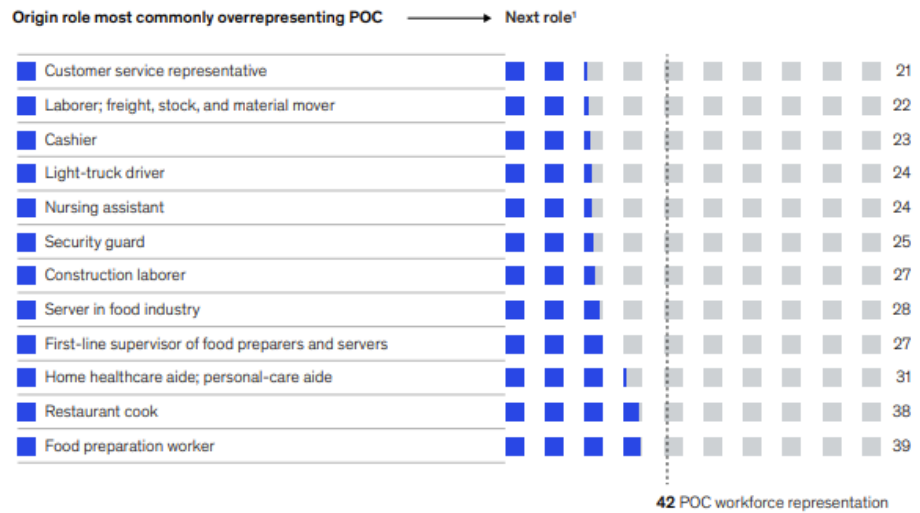
A closer look at Origin roles reveals unequal access to the jobs that provide a path to higher-paying jobs (Exhibit 11). Origin roles in which

workers of color are overrepresented (for example, security guards and light-truck drivers) have pathways to Next jobs, but workers of color are not promoted to these jobs.

Exhibit 11

Even in US origin jobs where people of color are overrepresented, White employees are generally overrepresented in the next job progressions.

Representation of people of color (POC) in moving from Origin job to Next role in United States, %



¹ Each Origin role has ≥10 Next-role progressions.
 *Source: Economic Modeling (Emsi); US Bureau of Labor Statistics; "Unlocking experience-based job progressions for millions of workers," McKinsey, June 2, 2021



“ I do feel like my race and ethnicity impact my trajectory at my company. In the 12 years that I’ve been here, I’ve not seen many women of color or people of color be promoted. They have a good ol’ boy mentality: it’s just like they only see us at a certain level within the organization, and you can’t go further than that.

We’ve had some really bright, talented Black individuals, but the culture just will not allow them to move forward or advance in positions that are beyond the bottom of the totem pole. I’m going to have to eventually make the decision to move elsewhere to pursue my goals and career dreams, because it’s just not going to happen here. ”

50-year-old Black woman, customer service supervisor

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Narrow, inconsistent definitions of professionalism and interpersonal skills are barriers to advancement for workers of color

Part of the value in moving from one job to another is the ability to build on existing skills and add new ones. Interpersonal skills are particularly critical: 70 percent of job progressions to Gateway and Target occupations rely on transferable skills such as leadership and social skills, which can be learned through on-the-job experience. However, the cultural context in which leadership and social skills are typically assessed is critical to understand and often acts as a barrier.

Research has found that many organizations believe employees of color lack the interpersonal skills needed to excel in new roles.²¹ And when employees of color do have the required skills, managers may not recognize them—perhaps due to factors such as cultural and language variations or implicit bias. In the transition from Origin to Next occupations, Black workers lose the most representation, while Latino workers do

marginally better (Exhibit 12). Among jobs, such as customer service, that require interpersonal skills, general and office management, sales and selling techniques, negotiation, and team building were the most frequently required.

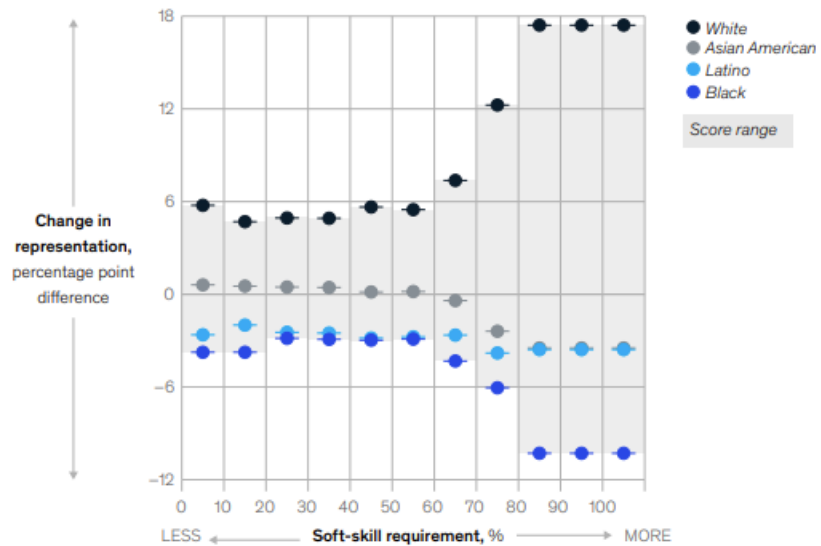
The challenges of assessing interpersonal skills in the front line

Since frontline jobs often involve interacting directly with customers or colleagues, workers are often assessed on their interpersonal skills—the behaviors and skills that guide effective interactions. In a customer service role, for example, interpersonal skills include a worker’s ability to understand why a customer was unhappy and how to resolve issues. The challenge is that when a manager evaluates a worker’s interpersonal skills, the exercise can quickly become subjective and prone to different types of conscious and unconscious bias. These biases can hold back frontline employees of color.

Exhibit 12

US workers of color lose representation when progressing from Origin jobs to Next jobs as soft-skill requirements increase.

Racial representation in Origin jobs to Next jobs in United States, by soft-skill requirement



Source: Economic Modeling (Emsi); US Bureau of Labor Statistics; "Unlocking experience-based job progressions for millions of workers," McKinsey, June 2, 2021

²¹ "Confronting Asian-American stereotypes," June 23, 2018; Daphna Motro et al., "The 'Angry Black Woman' stereotype at work," *Harvard Business Review*, January 31, 2022; Mariña Fernández-Reino and Ruta Yemane, "Latinos in the United States and in Spain: The impact of ethnic group stereotypes on labour market outcomes," *Journal of Ethnic and Migration Studies*, 2021, Volume 47, Number 6.

03



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A road map for change

Our research and analysis have clearly demonstrated that frontline workers want to develop, progress, pursue new opportunities, and find roles that are more fulfilling. In that regard, companies have the potential to mobilize and develop their front line, which could create benefits for workers and organizations alike.

Yet companies must provide more support to frontline workers to enable their career advancement. This will require companies to gain a better understanding of what frontline employees actually want and expect from their employer.²²

On an encouraging note, we have seen companies implement programs that could create a much richer, supportive frontline work experience. They have started to extend more support and opportunity to the front line, including higher starting wages, tuition reimbursement programs (such as Walmart's LiveBetterU), better training, more flexible work schedules, child care, parental leave, and retirement benefits such as 401(k) accounts and financial planning.

These actions are a good start, but companies must implement them on a widespread basis and then build on this foundation. Executives could extend DEI programs to the front line—the employees who are most negatively affected by current inequities—and tailor them to the specific needs of these workers. Companies could also act to ensure frontline workers have equitable access to development opportunities. They could also seek to transform their culture, including making sure managers have broader cultural awareness, to reduce the impact of biases around interpersonal skills. Organizations have also begun to champion more inclusive, skills-based hiring practices for the more than 70 million STAR workers.²³

This section offers a road map for companies to address myths about the front line and implement solutions that could improve the lives and livelihoods of frontline workers in a material way. Collectively, these actions could chart new paths to advancement, achievement, and prosperity.

Addressing three myths

Frontline employees consistently report a poor work experience and have difficulty advancing into more fulfilling, higher-paying jobs. These ongoing challenges have impeded progress because corporate leaders are unaware of the actual barriers they need to remove. We believe companies could make dramatic improvements in the frontline experience with potential solutions to three myths.

Myth 1: Frontline workers are free to move up the corporate ladder.

Reality: More than 70 percent of frontline workers want to be promoted within their companies, but only 4 percent make the leap to corporate.

While relatively few frontline workers get promoted to corporate jobs, it's not for lack of interest. By acknowledging this truth, companies can turn their focus to increasing that number. Three specific actions can open this pathway to more workers:

Formalize paths for advancement from the front line to corporate roles

Companies could remove artificial barriers to promotion and create clear paths from initial frontline roles to higher-paying jobs with more opportunity. This priority has two elements: first, companies could facilitate conversations with frontline workers to understand their interests and identify development needs. Second, they could consistently highlight internal job openings with the potential for career advancement. This enhanced visibility can combat systemic disparities by creating equal access to information and resources and ensuring qualified candidates are aware of these positions.

Overhaul the frontline talent management system

Implementing a systematic debiased approach to performance reviews could help companies identify frontline workers for advancement opportunities and create individual development plans. By adopting skills-based practices (rather than four-year degrees) across the talent

²² Swathi Bhaskaran, Andrew Davis, Christophe Desbrière, and Sara Wasserteil, "Bridging the advancement gap: What frontline employees want—and what employers think they want," McKinsey, July 21, 2022.

²³ "The paper ceiling," Opportunity@Work, accessed July 28, 2022.

The impact of sponsorship

“ I started five years ago in the industry I am in right now. My sponsors have been very effective, and they’ve allowed me to rotate jobs and learn about different departments. I’ve been able to learn new types of skills. Instead of learning one to three things, I’ve been able to learn seven, eight, nine, ten different things. I’ve learned the different aspects of the company—whether it be doing deliveries, checking boxes, or talking to customers.

I started as a delivery driver. Then I moved up to delivery manager, then field manager, then sales manager—all within the same company. And I’ve gotten promotions to learn new skills every time.

Now I have role models and new skills. I’m learning from managers and leaders—what they have done; their failures and habits; how they’ve succeeded—and it has helped me learn where I can go. ”

23-year-old Latino man, sales manager

management journey—from sourcing to interviewing to onboarding, upskilling, and internal promotions—organizations could help reduce bias and create more opportunities for upward mobility among people of color. Companies could also use analytics to mitigate bias in hiring, performance reviews, and promotions to ensure that high-potential workers aren't sidelined unnecessarily.

Establish a talent market program

The path for advancement often includes a progression to different types of roles—for example, from customer service representative to computer-user-support specialist. Companies that can't accommodate these paths could partner with other companies (through talent platforms and brokering) to orchestrate smart job moves for promising workers.

Myth 2: Frontline workers are not qualified for higher-level roles.

Reality: 70 percent of job progressions to Gateways hinge on transferable interpersonal skills, which are best learned through experience.

With the removal of structural barriers, frontline workers could have a stronger chance of progressing to higher-paying jobs that can usher them into the middle class. Companies can support upward mobility by emphasizing on-the-job experience, and creating more transparency around opportunities and skills needed.

Define the skills frontline workers need for higher-level roles

Companies can catalog the skills that frontline workers are gaining in their current roles and then compare these skills with the specific requirements for Next roles. An example would be moving from a cook in a restaurant to a food manager to a branch manager to the corporate office. Companies could then chart out potential progressions for frontline workers to move from Origin jobs to Next roles. This exercise could include determining where to invest in development opportunities to help employees address skill gaps.

Reward experience rather than relying on credentials

Transforming perceptions of interpersonal skills is a critical factor in advancement to Gateway and Target roles. Companies should consider shifting their hiring requirements away from a credentials-based approach that serves as a proxy for certain skills. Currently, 75 percent of jobs require a four-year degree, but just 40 percent of applicants have one.²⁴ Instead, organizations could prioritize credentials that reflect relevant skills while recognizing skills attained through job experience. To support the acquisition of skills, companies could create project-based opportunities from frontline jobs to manager and corporate roles where workers can be exposed to different experiences, learn new skills, and "fail safely."

Identify Gateway jobs, and remove artificial barriers to promotion

Companies could share information about internal career progressions with frontline workers, with an emphasis on the Gateway roles available to workers in certain jobs. Given the importance of Gateway roles in altering career trajectories, companies could ensure they consider a diverse slate of candidates for these roles and aspire to promote workers in line with their share of the frontline workforce. Companies could track and disaggregate promotion data by race and gender at a minimum and provide these data to managers.

Myth 3: High rates of turnover are just the way it goes on the front line.

Reality: Companies have a responsibility to create a better employee experience.

For too long, companies have accepted high attrition on the front line as an immutable fact. Many frontline employees report leaving their jobs due to a lack of support and sense of belonging, but it doesn't have to be this way. Companies can improve the workplace environment to make the worker experience more positive and sustainable. In doing so, they could capture a range of benefits, from improved reputation to an enhanced ability to attract talent.

²⁴ "Paper ceiling," accessed July 28, 2022.

Give a voice to frontline workers

The front line makes up a large portion of the total workforce at many companies, acting as the organization's operational muscle. Executives can harness the frontline workforce's talents by making it an innovation engine—gathering insights from customer-facing employees, involving frontline workers in decision making, and giving them a platform to share ideas with senior leaders. Companies could also consider expanding benefits, such as employee stock ownership plans (ESOPs), that can contribute to meaningful wealth creation. These efforts could help frontline workers feel more included and invested in the business.

'Raise the floor' on the frontline experience

Frontline employees report dissatisfaction with their existing jobs due to a lack of opportunities for career advancement, uncaring and uninspiring leadership, and inadequate total rewards packages. Improving job quality can contribute to the overall experience and satisfaction of workers. Companies should consider reassessing the benefits available to frontline workers and expanding their offerings. For example, mental-health support, greater flexibility in the workplace, and improved transparency and predictability in scheduling could help improve the frontline experience. In addition, organizations could encourage employees to take advantage of these programs.

Invest in frontline managers

Frontline managers are the key shapers of worker experience and sometimes the only point of contact for an employee. Companies can show their commitment to elevating the frontline experience by improving the representation of workers of color in manager roles.

Companies could also provide these leaders with improved instruction and resources—for example, diversity and bias training as well as training in social-justice-based conflict resolution. Managers who develop better listening skills are better equipped to spot promising talent, such as workers with interpersonal skills. Companies could make investments to ensure that effective sponsorship for workers is a responsibility for frontline managers. Initiatives could include a mix of on-the-job training, coaching, and opportunity creation.

Conclusion

For tens of millions of workers of color, frontline jobs have the potential to be far more than just a livelihood. Companies that truly invest in the front line can make these roles a starting point for a fruitful career, a clear path to the middle class, and a way to transition to interesting new jobs across industries. Much work remains to fulfill this aspiration. But for workers who have been traditionally overlooked, the time is long past due for companies to provide more opportunities and support.

Common traits of frontline workers of color that have advanced their careers

As we have noted, workers of color face multiple roadblocks to progressing in frontline roles. While companies step up their support for the front line, workers of color could follow the lead of peers who successfully navigated pathways to advance their careers. Our analysis suggests several common traits of these workers.

They got as much on-the-job coaching as possible. These workers asked to shadow more senior peers on tasks in order to gain more exposure and benefit from additional guidance. These informal interactions often turned into more formal sponsor relationships.

They were open to taking on new tasks. Work experience accounts for 46 percent of the average person's accumulated skills. Workers who volunteered for new assignments not only broadened their knowledge and experience but also distinguished themselves by showing initiative.

They reframed skill sets to match the qualifications for Next roles. These workers were thoughtful in how they positioned their qualifications, particularly given the importance of interpersonal skills. For example, a successful barista may be an expert at making coffee but may also have the more marketable skill of providing

an excellent customer experience in high-stress environments.

They actively sought out companies that emphasize advancement. Believing all jobs and organizations are the same is a trap. If a company isn't providing opportunities to move into other roles, these workers sought employers that champion mobility within the organization. However, not all workers have the time and resources to apply for new jobs, the flexibility to take time off to interview, or access to transportation to travel to and from interviews. Such support will also be integral to enabling workers to pursue new opportunities.



Technical appendix

Methodology

External research in this report is based on economic and labor data of frontline workers in the United States. Sources consulted are the Bureau of Labor Statistics Occupational Employment Statistics (2019); the Bureau of Labor Statistics Current Population Survey (2019); the Equal Employment Opportunity Commission, EEO-1 data (2018); the Quarterly Census of Employment and Wages; EMSI data (2019); and Moody's Analytics. The data from those sources were combined with data from the United States Census Bureau American Community Survey (2019) to help gain perspective on frontline workers across different races. Research data predate the impact of the COVID-19 crisis on the US labor force, so these effects are not reflected in Part 1 of this report.

Participating company research is based on 53 companies, which collectively employ four million workers and represent the bulk of major industries across the United States. Participating companies submitted talent pipeline data, and HR professionals provided information on policies, programs, and priorities on behalf of their companies. Approximately 15,000 employees from ten of the participating companies were surveyed on their workplace inclusion experience. Participation in the Employee Experience Survey was encouraged but optional. All data collection occurred from January to May 2022. In addition, individual testimonials and surveys were collected from 52 frontline workers across all races and genders. Talent pipeline data reflects the representation of employees as of December 2021, as well as personnel changes (for example, due to promotion, hiring, or attrition) during the 2021 calendar year. The broader Inclusion Assessment benchmark includes survey feedback from 31 companies and 59,000 US employees surveyed from September 2020 to March 2022. These data sets represent point-in-time snapshots and reflect companies' responses and employees' experiences at the time that the survey was taken. We did not collect employees' direct personal identifiers (for example, name, employee ID, and email address) from companies or through the survey.

Pipeline data and analytics

Overall metrics

All pipeline metrics (for example, representation, promotion rates, hiring shares, or attrition rates) were initially calculated for each participating

company. Aggregate results across companies were then calculated by taking the unweighted average of the representation, promotion rates, hiring shares, and attrition rates of all companies.

Definition of job levels

Companies categorized their employees into nine levels based on the following standard definitions, taking into account reporting structure and salaries. The levels and definitions provided were as follows:

- *L0—Board of directors.* Official directors of the board, responsible for organization and management
- *L1—Executives.* CEO and direct reports to the CEO, responsible for company operations and profitability
- *L2—Senior vice presidents and other similar jobs.* Senior leaders within the organization with significant business unit or functional oversight
- *L3—Vice presidents and other similar jobs.* Leaders within the organization, responsible for activities or initiatives within a subunit of a business unit or function or who report directly to senior vice presidents
- *L4—Senior managers.* Seasoned managers and contributors, responsible for multiple teams and discrete functions or operating units
- *L5—Managers.* Junior managers and contributors, responsible for small teams or functional units or operations
- *L6—Entry level.* Employees responsible for carrying out discrete tasks and participating on teams, typically in an office or corporate setting
- *L7A—Field or frontline (salaried).* Salaried operational or customer-facing jobs, usually trained on the job and not requiring specialized credentials
- *L7B—Field or frontline (hourly people managers).* Operational or customer-facing roles, usually trained on the job and not requiring specialized credentials; specifically for roles who manage or supervise at least one person
- *L7C—Field or frontline (hourly individual contributors).* Hourly operational or customer-facing jobs, usually trained on the job and not requiring specialized credentials

Metrics and analytics

Talent pipeline data included the representation of race and ethnicity (overall and by gender). Additionally, companies reported the number of individuals of each race who were hired, promoted, or left the company (overall and by gender). Promotion and attrition rates were calculated for each race overall at each level. Promotion rates were calculated by dividing the number of promotions of individuals of that race into a given level by the total number of promotions at that same level. Attrition rates were calculated by dividing the number of individuals of each race who left the company at a given level by the number of individuals at that level.

Employee experience survey and analytics

Survey participation

More than 15,000 employees from ten companies elected to participate in the Employee Experience Survey. The survey questions covered multiple themes (for example, sponsorship, mentorship, feedback, advancement, and Employee Resource Groups), as well as demographic questions (for example, age, race, gender, and sexual orientation). The survey also incorporated McKinsey's Inclusion Assessment.

Bivariate and multivariate statistical reporting

Survey results were reported as an unweighted, pooled average of responses across companies. Many of the questions offered a five-point, labeled response scale (for example, "strongly disagree" to "strongly agree"). Unless otherwise specified, analyses aggregated the top two and bottom two boxes of the response scale (for example, "somewhat agree" and "strongly agree"). Where we highlight differences between races or other groups, we highlight only those differences that are substantial and reliable. To that end, all differences noted in this report are statistically significant at a confidence level of 95 percent (using a two-tailed test) and reflect a difference of at least five percentage points between two groups.

Inclusion Assessment

Methodology behind the Inclusion Assessment

McKinsey's Inclusion Assessment provides two ways to help us understand the state of inclusion: scores and gaps. Inclusion scores show the perceptions of inclusion indicated by a percentage of favorable responses. Gaps show the score differences between employee groups

(for example, in-groups and out-groups) that represent inconsistency of experiences.

There are four measures of inclusion in the assessment:

- *Overall inclusion score.* This reflects the degree to which an organization's processes, systems, and people foster a welcoming and fair environment for all employees to be themselves, make connections, and meaningfully contribute. It is measured by averaging all enterprise and individual-level scores.
- *Subscores.* Enterprise perception subscores tell us how employees view the strength of acceptance, camaraderie, and fairness across all groups of the enterprise. Individual experience subscores tell us how employees personally feel encouraged to bring their full, authentic selves to work (authenticity and belonging) and feel empowered to make meaningful contributions (meaningful work).
- *Inclusion outcome scores.* These tell us the effectiveness of shaping an inclusive organization and are measured by percentage of favorable responses on an agreement scale. Examples include acceptance, authenticity, and belonging.
- *Inclusion practice scores.* These show the occurrence of behaviors and actions that drive inclusiveness and are measured by percentage of favorable responses on a frequency scale. Examples include work–life support, meritocracy, protective mechanisms, team building, and so on.

Employee interviews

The insights on experience in this report come from the surveys conducted across approximately 15,000 employees from ten of the participating companies and the broader Inclusion Assessment benchmark, which includes survey feedback from 31 companies and 59,000 US employees surveyed from September 2020 to March 2022. In addition, we collected individual testimonials from 50 frontline workers and preliminary experience analysis from 1,600 workers.

Origin–Target–Gateway model

occupation examples

Example roles by job type.

List is not exhaustive

Roles with highest representation by race

● Asian American ● Latino ● Black ● White

Origin	Mid-wage Origin	Adjacency	Gateway	Target
Manicurists and pedicurists	Chefs and head cooks	Acupuncturists	Software quality assurance analysts and testers	Software developers
Graders and sorters, agricultural products	Plasterers and stucco masons	Cargo and freight agents	Food service managers	Farming, fishing, and forestry supervisors
Nursing assistants	Postal service mail sorters	Healthcare social workers	Licensed practical and vocational nurses	Social workers
Conservation scientists and foresters	Directors, religious activities, and education leaders	Tool and die makers	Dental hygienists	Agricultural managers
Bakers	Automotive master mechanics	Aircraft mechanics and service technicians	Credit analysts	Accountants and auditors
Cashiers	Commercial drivers	Electricians	Firefighters	Business intelligence analysts
Coaches	Dancers	Environmental restoration planners	Insurance underwriters	Critical care nurses
Construction workers	Fitness trainers	Laboratory technologists	Interior designers	Engineers
Maintenance and repair workers	Graphic designers	Music directors	Loan officers	Market research analysts
Personal care aides	Human resources assistants	Nurse practitioners	Paralegals	Marketing managers
Retail salespersons	Legal secretaries	Optometrists	Radiologic assistants	Online merchants
Stock clerks	Massage therapists	Pharmacists	Real estate sales agents	Police detectives
Taxi drivers and chauffeurs	Midwives	Plumbers	Social and community service managers	Special education teachers
Woodworkers	Police, fire, and ambulance dispatchers	Postsecondary teachers	Surgical assistants	Supply chain managers
		Sheriffs and deputy sheriffs	Tax examiners and collectors	Surveyors
		Ship pilots		Therapists
		Veterinarians		

EEO job classifications and examples

The Equal Employment Opportunity Commission EEO-1 data, which is based on filings from all companies with more than 100 employees, enables a comparison by both industry and

job classification. EEO-1 includes nine job classifications based on responsibilities and primary duties, knowledge and training, and level of skill the job requires. We analyzed these data to understand the intersection between the industries where frontline workers are concentrated and their job classifications.

Job classification	Example job titles
Managers and executives	CEO, CIO, managing partners, presidents, VPs, directors, managers
Professionals	Lawyers, accountants, pilots, nurses, chemists, designers, teachers
Technicians	Drafters and surveyors, emergency medical technicians, broadcast and sound engineering technicians
Sales workers	Insurance sales agents, telemarketers, retail salespersons, cashiers
Office and clerical workers	Office support workers, auditing clerks, cargo and freight agents, desktop publishers
Craft workers	Automotive mechanics, carpenters, electricians, painters, plumbers
Operatives	Butchers, factory bakers, industrial forklift operators, laundry workers, textile workers, truck drivers
Laborers	Construction laborers, freight movers, groundskeepers, septic tank servicers, vehicle cleaners
Service workers	Hairdressers, janitors, cooks, medical assistants, ushers, police, guards, private detectives

BLS occupational groups and examples

The Bureau of Labor Statistics Occupational Employment Statistics provides the occupation group for workers across industries.

Occupational groups	Example occupations
Architecture and engineering	Landscape architects, electrical engineers, nuclear engineers, surveyors
Arts, design, entertainment, sports, and media	Artists, fashion designers, actors, athletes, musicians, writers, photographers, lighting technicians
Building and grounds cleaning and maintenance	Building cleaning workers, pest control workers, grounds maintenance workers

Occupational groups (continued)	Example occupations (continued)
Business and financial operations	Business operations specialists, logisticians, financial specialists, loan officers
Community and social service	Social workers, religious workers, marriage and family therapists
Computer and mathematical	Computer systems analysts, computer programmers, actuaries, statisticians
Construction and extraction	Boilermakers, tile and stone setters, electricians, glaziers, construction laborers, pipelayers
Educational instruction and library	Postsecondary teachers, preschool teachers, special education teachers, librarians, archivists
Farming, fishing, and forestry	Agricultural workers, logging workers, forest and conservation workers
Food preparation and serving-related	Cooks, waiters, bartenders, dishwashers, hosts and hostesses
Healthcare practitioners and technical	Dentists, pharmacists, veterinarians, general internal medicine physicians, health technicians, licensed vocational nurses
Healthcare support	Psychiatric aides, orderlies, home health aides, massage therapists, medical assistants, pharmacist aides
Installation, maintenance, and repair	Electrical installers, equipment mechanics, vehicle and mobile equipment mechanics, home appliance repairers
Legal	Lawyers, judges, paralegals
Life, physical, and social science	Microbiologists, epidemiologists, astronomers, chemists, hydrologists, historians
Management	Chief executives, marketing and sales managers, financial managers, food service managers
Office and administrative support	Switchboard operators, brokerage clerks, new accounts clerks, dispatchers, couriers, messengers
Personal care and service	Animal care and service workers, embalmers, funeral attendants, personal appearance workers, childcare workers
Production	Assemblers, fabricators, food processing workers, metalworkers, welding workers, printing workers
Protective service	Firefighters, law enforcement workers, animal control workers, security guards
Sales and related	Cashiers, travel agents, models, real estate brokers, door-to-door sales workers, telemarketers
Transportation and material moving	Motor vehicle operators, water transportation workers, traffic technicians, parking attendants



**La feminización del trabajo de cuidado no remunerado:
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2023

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Abreviaturas

ASCADA: Asociación Costarricense de Alzheimer y otras Demencias Asociadas

CEDAW: Comité para la Eliminación de la Discriminación contra la Mujer

CEPAL: Comisión Económica Para América Latina y el Caribe

CIEM: Centro de Investigación en Estudios de la Mujer

CONAPAM: Consejo Nacional de la Persona Adulta Mayor

CONAPDIS: Consejo Nacional para la Integración de la Persona con Discapacidad

COSEVI: Consejo de Seguridad Vial

CCSS: Caja Costarricense de Seguro Social

DST: División Sexual del Trabajo

ENAH: Encuesta Nacional de Hogares

ENUT: Encuesta Nacional de Uso del Tiempo

FAO: Organización de las Naciones Unidas para la Alimentación y la Agricultura

FONATEL: Fondo Nacional de Telecomunicaciones

GAM: Gran Área Metropolitana

IDA: Instituto de Desarrollo Agrario

IMAS: Instituto Mixto de Ayuda Social

INA: Instituto Nacional de Aprendizaje

INAMU: Instituto Nacional de las Mujeres

INDER: Instituto de Desarrollo Rural

INEC: Instituto Nacional de Estadística y Censos

INS: Instituto Nacional de Seguros

MEP: Ministerio de Educación Pública

MICITT: El Ministerio de Ciencia, Innovación, Tecnología y Telecomunicaciones

MIDEPLAN: Ministerio de Planificación Nacional y Política Económica

MTSS: Ministerio de Trabajo y Seguridad Social

MUSADE: Mujeres Unidas en Salud y Desarrollo

OIT: Organización Internacional del Trabajo

OMS: Organización Mundial de la Salud

ONU: Organización de las Naciones Unidas

PANI: Patronato Nacional de la Infancia

PEDRT: Política de Estado para el Desarrollo Rural Territorial

REDCUDI: Red Nacional de Cuido y Desarrollo Infantil

SEPSA: Secretaría Ejecutiva de Planificación Sectorial Agropecuaria

SINCA: Sistema Nacional de Cuidados y Apoyos para Personas Adultas y Personas Adultas Mayores en Situación de Dependencia

CAPÍTULO I

ASPECTOS GENERALES DE LA INVESTIGACIÓN

1.1. Justificación

Es un hecho que la sociedad desde su conformación se ha organizado a partir de la separación de responsabilidades y tareas según el sexo asignado al nacer. Este proceso es definido bajo el término División Sexual del Trabajo, el cual, en la actualidad, se ha convertido en la base de la producción y reproducción; por tanto, no solo define la percepción sobre qué trabajos deberían ser realizados por cada persona acorde con su sexo biológico, sino que también delimitó una ruta en la que convergen las diferencias tanto de hombres como de mujeres en aspectos como cuidado, trabajo, tasa de participación social, salarios y qué tipos de trabajos debían ser reconocidos (posteriormente remunerados) para la sociedad, entre otros aspectos vinculados con la producción y reproducción social.

Aún siglos después de los primeros indicios de organización social, las mujeres continúan confinadas a hacerse cargo del espacio privado y el trabajo no remunerado, que incluye las labores domésticas y el trabajo de cuidados principalmente. Debido a que como lo expone Federici (2013) este rol:

[...] no solo se les ha impuesto a las mujeres, sino que ha sido transformado en un atributo natural de nuestra psique y personalidad femenina, una necesidad interna, una aspiración, proveniente supuestamente de las profundidades de nuestro carácter de mujeres. [...] Fue transformado en un atributo natural [...].
(p. 101)

La cita anterior evidencia que el encargarse del espacio privado y el cuidado, tiene como base un ideal que proviene y se centraliza en este “atributo natural”, en una fuerte interiorización en cada una de las mujeres; es por esto, que el espacio privado, el cual, tiene que ver con el trabajo de reproducción, cuidado, trabajo doméstico no remunerado y remunerado, entre otros; es reconocido socialmente como exclusivo de la mujer. Así mismo, todo converge en elementos impuestos, transformados y principalmente bajo una construcción social que no solamente ha sido histórica y material al enclaustrar a las mujeres, sino que también ha limitado su decisión y posibilidad para incorporarse a otros espacios, pero de forma invisible, creando la ilusión de que es natural.

Es así que, producto de estas transformaciones socio-históricas, se construye un pensamiento social donde las mujeres son comprendidas como aquellas quienes deben encargarse de roles socialmente impuestos como lo es el del trabajo de cuidado. Por ejemplo, el III Estado de los Derechos Humanos de las Mujeres en Costa Rica (2019) afirma que, poco más del 65% de la población prefiere asignar las labores de cuidado en el hogar a la madre, alguna mujer de familia, o ajena a esta (pero siempre mujeres), ya que consideran que con la mujer las personas dependientes están “mejor cuidadas”, y no solo eso sino que también demuestra el arraigo que existe de destinarla al confinamiento del espacio privado sin importar su edad, ya que muchas veces son niñas, adolescentes, adultas y adultas mayores quienes deben ejercer dicho trabajo.

Lo anterior trae consigo una determinada lógica bajo la cual se socializa y organiza a la población y las relaciones sociales, generando a su vez una determinada forma de percepción y materialización de la vida en sociedad (leyes, instituciones, acuerdos, entre otros). Esto podría ser de mucho interés para instituciones y organizaciones que constantemente trabajan para incidir en la normativa jurídica y política que redistribuye, la cuestión de la carga doméstica y el trabajo de cuidado hacia las mujeres, en especial si se considera que más de la mitad de la población (tanto en hombres, como en mujeres), aún se inclina por recargar “voluntariamente” el trabajo de cuidado, especialmente aquel cuidado perteneciente a las poblaciones que requieren de una supervisión y esfuerzo constantes, como adultos mayores, infantes, personas con discapacidad, entre otros. Este tipo de pensamiento, al ser naturalizado y colectivo, se materializa en las instituciones de la sociedad y en cómo invierten estas en la realidad de las y los habitantes.

Ante esto, Anzorena (2008) expone que:

[...] el lugar socialmente asignado como prioritario a las mujeres se va configurando en torno de las funciones de cuidado de la familia y las tareas domésticas. De este modo, la vinculación con lo doméstico se convierte en la definición primaria del rol de las mujeres en las sociedades capitalistas. Su participación en la producción se entiende como complementaria o secundaria respecto de su función primordial, ocupando en la esfera de la producción un lugar subordinado y de menor valor con respecto al varón. (p. 14)

Bajo esta lógica, se tiene como resultado que las mujeres, como imposición social, se les asignará el trabajo de cuidado no remunerado, ya que se cree que tanto social, como física y mentalmente, se encuentran capacitadas para realizarlo y que es su papel a cumplir en la sociedad. Además, se evidencia que este atributo natural que se les “caracteriza” converge en un mar que desvaloriza el cuidado al no considerarlo

como un trabajo que implica tiempo al igual que los demás, ya que, se sostiene desde ideales de capacidad biológica que el Estado y mercado laboral legitiman.

Ante esto Federici (2013) expone que:

El capital tenía que convencernos de que es natural, inevitable e incluso una actividad que te hace sentir plena, para así hacernos aceptar el trabajar sin obtener un salario. A su vez, la condición no remunerada del trabajo doméstico ha sido el arma más poderosa en el fortalecimiento de la extendida asunción de que el trabajo doméstico no es un trabajo. (p.101)

La cita anterior demuestra cómo las mujeres son un elemento vital para el sostén del capitalismo debido a que asume de manera gratuita tareas domésticas y de cuidado de hijos, hijas, personas enfermas y adultos y adultas mayores, por ello, su inserción al mercado laboral también fue identificada como una amenaza al mantenimiento y la reproducción de la fuerza de trabajo y del control de los hombres en la esfera pública y privada, ya que, se cuestiona el cómo el trabajo asalariado podía poner en riesgo la idea de que las mujeres no fueran atender labores de cuidado y familiares, por estar inmersas en el mercado laboral.

En este sentido, al considerar a las mujeres como portadoras de habilidades y destrezas, las cuales sólo les permiten ser trabajadoras de segunda categoría y haciendo ver a sus capacidades como si estas estuvieran orientadas solamente a la reproducción y al cuidado de la vida, teniendo como resultado la invisibilización y poco el poco o nulo reconocimiento de la labor que realizan, debido a esta asignación por su supuesta capacidad biológica.

Por tanto, se comprende que toda esta asignación llevó a que las mujeres fueran las encargadas del espacio privado y reproductivo, obligándolas a mantenerse en dicho espacio aun cuando el sistema exige la salida de las mujeres al mercado laboral para garantizar mayor producción y acumulación de capital.

En este sentido, la salida de las mujeres del espacio privado al ámbito laboral remunerado ha estado condicionada por diversos factores como lo son las reivindicaciones de los movimientos sociales de mujeres y feministas, satisfacción de necesidades, además, del desarrollo tecnológico, la política de costes salariales, las formas de organización de la producción, factores económicos de necesidad del grupo familiar (Agenjo, 2021), y esto sin obviar las grandes luchas de los movimientos sociales que han reclamado la inclusión y el cumplimiento de los derechos de las mujeres con respecto a la incorporación de ellas al mercado de trabajo.

Sin embargo, a pesar de que el sistema económico y social necesita que la mujer se incorpore a la fuerza laboral, la realidad expone que ellas no pueden dejar de lado el trabajo de cuidado, ya que como se ha venido mencionando se les ha obligado a

responsabilizarse de esta labor y a asumirla aun cuando se vuelven parte de la fuerza laboral en el mercado.

Ejemplo de lo anterior es lo expuesto por el Instituto Nacional de Estadística y Censos (en adelante INEC), donde se demuestra que las mujeres han aumentado su participación en el mercado laboral desde el inicio del nuevo milenio, precedido por diversas crisis que aún están latentes; sin embargo, continúan asumiendo primero sus labores domésticas, invirtiendo un aproximado de 36 horas semanales, y una carga global de trabajo de 73 horas semanales, en comparación con los hombres que invierten aproximadamente la mitad de dicho tiempo (INEC, consulta 2021).

Estos datos resaltan que, aunque las mujeres estén en el espacio laboral remunerado, si viven con personas dependientes en el espacio privado, la responsabilidad de su cuidado y atención, recae casi de forma exclusiva sobre las mujeres, lo que produce una sobrecarga laboral (doble o triple jornada) exhaustiva y las imposibilita de dedicarse a otros espacios o actividades.

Es necesario resaltar esta última idea, ya que gran cantidad de mujeres se ven en la obligación de asumir el cuidado de familiares adultos mayores o personas dependientes, lo que implica, en algunos casos que se dan períodos extensos de cuidado; lo que imposibilita que ellas logren obtener trabajos que conlleven labores más allá del cuidado. A diferencia de los hombres, que cuando se involucran en estas actividades lo hacen en menor frecuencia, y aún menos de forma que afecte el resto de sus actividades cotidianas.

Esta discusión presenta una realidad concreta en la cual las mujeres se han convertido en la base del funcionamiento del espacio doméstico, ocasionando que casi toda la inversión del tiempo disponible de las mujeres sea dedicado a este tipo de trabajo y a las labores de cuidado, aunque sin que se le reconozca como trabajo socialmente, priorizando estas incluso antes que al desarrollo personal, lo que continúa generando desigualdad respecto a los roles de género, y al tiempo que ellas invierten en sus vidas cotidianas.

Ahora bien, al considerar el contexto de las zonas rurales, la realidad de la incorporación de la mujer al espacio de trabajo remunerado se torna aún más compleja debido a que es en la ruralidad donde predominan una serie de factores y particularidades como la sobrecarga laboral, la falta de autonomía económica, la escasez de fuentes de trabajo, inestabilidad laboral ya que las que se encuentran son precarias, los cuales, afectan la calidad de vida de las mujeres rurales, como lo exponen Bedoya y Velásquez (2020), ocasionando que ellas se vean en la obligación de asumir las labores de cuidado.

Lo anterior, se ve reflejado en la Encuesta Nacional de Uso del Tiempo (en adelante ENUT), realizada por el INEC en 2017 en la que se expone que en los espacios rurales

las mujeres suelen dedicar 26 horas a las labores de cuidado no remunerado dándose una total predominancia de mujeres e hijas cuidadoras. Aunque en este trabajo no se pretende comparar las particularidades del espacio rural en contraposición al espacio urbano, es notable el hecho de que, si bien en ambos se presenta la feminización del trabajo de cuidado, es en las zonas rurales donde se incrementa debido a factores económicos, políticos y culturales.

Entonces, en Costa Rica la cotidianidad en zonas rurales continúa siendo trastocada por particularidades como el trabajo de cuidado no remunerado, la falta de oportunidades laborales, entre otras, las cuales, han tenido como consecuencia el impacto en grupos poblacionales como las mujeres y las y los adultos mayores.

Ante esto, se puede considerar que el espacio rural adquiere una importancia vital para la elaboración de un trabajo de investigación de esta índole, tomando en cuenta la falta de exploración que presenta en relación con su cotidianidad y la socialización específica que genera para las mujeres costarricenses en cuanto al cuidado de las personas adultas y adultos mayores, ya que, el tiempo social que dedican al trabajo no remunerado las mujeres rurales es mayor al de las mujeres urbanas (INEC, 2018).

Lo anterior, es un reflejo de las particularidades que enfrentan las mujeres de zonas rurales ante la carga que les representa las labores de cuidado, por lo cual, se decide seleccionar los distritos de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela debido a que están ubicados en áreas rurales caracterizadas por lejanía de servicios básicos, instituciones educativas, entre otros.

En este sentido desde el Trabajo Social, es de gran importancia poner en práctica las diversas herramientas que se adquieren durante el ejercicio de la carrera para analizar, visibilizar e intervenir en situaciones que atentan contra el control y desarrollo dignos de la vida humana, la cual se encuentra afectada por un sistema que vulnerabiliza el acceso a condiciones de vida decentes para sectores considerados inferiores.

Valorando lo expuesto anteriormente, como investigadoras y trabajadoras sociales, se considera que el análisis respecto a la feminización de las labores de cuidado, partiendo de las experiencias de las mujeres que habitan en zonas rurales y que realizan este trabajo en su vida cotidiana y dentro de sus círculos familiares de forma no remunerada, contribuye a que dichas vivencias sean visibilizadas y reconocidas como una realidad que puede, y debería, ser problematizada y valorada socialmente, con la finalidad de intervenir desde todas las dimensiones del trabajo social.

De manera que, como profesionales, estudiantes y mujeres, se considera que dicha desigualdad en cuanto a la distribución de las tareas de cuidado y su inevitable doble jornada laboral dificulta en gran medida la realización personal de muchas mujeres, y con mayor fuerza en zonas geográficas donde la falta de oportunidades de estudio,

trabajo y organización comunitaria convierten el espacio privado, en prácticamente el único donde las mujeres pueden llegar a desenvolverse, provocando a la larga situaciones desfavorables a nivel colectivo.

Finalmente, el visibilizarse el trabajo no remunerado, y en especial aquel que ejercen las mujeres, forma parte de una lucha que se ha presentado en diversos momentos históricos y que continúa en la actualidad, por ejemplo, desde colectivas feministas y movimientos sociales, pero cuya base y causa presente en la estructura del sistema continúa sin mayores modificaciones, aspecto que se refleja en la brecha de desigualdad del cuidado.

1.2. Planteamiento del problema

La problemática sobre la feminización del trabajo de cuidado puede tener muchas manifestaciones, las cuales se aprecian en los diversos espacios donde se desenvuelven las mujeres, ya sea social, económico, cultural, político, religioso, entre muchos otros. Debe recordarse que estos espacios no se encuentran aislados, y que la afectación de uno de ellos puede desestabilizar la presencia de la mujer en los demás, o bien, puede reestructurarla de una manera determinada, acorde con los intereses de los grupos dominantes y del sistema. De acuerdo con esto, todos estos espacios forman parte de una misma realidad y la forma en que se construyen de manera individual, afectará su estructura colectiva y viceversa.

El sistema capitalista, con sus diversos espacios, en el que se incluyen a las mujeres hasta cierto punto, han coincidido con el sistema patriarcal que determina qué trabajos deben tomar las mujeres y qué tipo de remuneración debe asignársele a estos, esto con base en una muy marcada división sexual del trabajo humano. En este contexto, el trabajo de cuidado es uno de los mejores ejemplos, ya que históricamente la sociedad lo ha asignado a las mujeres. La forma en que dicho sistema patriarcal ha construido las relaciones sociales y la visión de la realidad implementada en él, probablemente sea uno de los aspectos que más han contribuido a la feminización del trabajo de cuidado, ya que las mujeres no solamente han asumido la labor por imposición social, sino que el mismo sistema lo ha vuelto parte de la cultura y los anhelos de la mujer.

En este sentido, el trabajo de cuidado es social y culturalmente atribuido a la mujer, pero al mismo tiempo, modifica las leyes y el sistema jurídico bajo el cual se rige la sociedad, por tanto, las leyes, acuerdos y discursos políticos, que han mantenido dicha visión del trabajo de cuidado siendo un rol asumido por las mujeres, juegan un papel de gran importancia al momento de generar reglas y acuerdos sociales con un nivel de credibilidad muy alto y que legitiman la feminización del cuidado.

Incluso cuando se trata de avanzar en leyes que iguallen el tiempo de trabajo de cuidado para ambos sexos, por ejemplo, el extender las licencias de paternidad para

los padres de familia, persiste aún la idea colectiva de que no es necesaria la igualdad en el trabajo de cuidado, porque son las mujeres quienes tienen mayor capacidad física y mental de encargarse de dicha tarea y no los hombres.

Esto podría ayudar a comprender por qué se dice que el desempleo tiende a tener un rostro femenino, ya que, las mujeres suelen ser las encargadas del cuidado, por lo que, en la actualidad las personas empleadoras tienden a preferir a alguien sin estas responsabilidades de por medio; debido a esto se dan pocas posibilidades de ingresos a espacios laborales formales; resultado de ello, las mujeres deben decidir entre uno u otro: el trabajo/estudio o el cuidado, o convivir con dobles o triples jornadas de trabajo.

Este tipo de contexto socio-cultural y económico se agudiza al volver la mirada hacia las zonas rurales de la región, ya que el tiempo destinado al trabajo de cuidado tiende a ser mayor en grandes proporciones, dedicando casi el doble de horas de las que se tiende a dedicar en zonas urbanas. Lo anterior no tiene por qué ser una regla indiscutible, pero sí refleja una realidad presente en numerosos debates, especialmente en cuanto a temas como desarrollo, desigualdad, pobreza y exclusión.

En las zonas rurales del país, se ha evidenciado un fuerte abandono por parte de los gobiernos de turno, dificultando el acceso de estas a una gran diversidad de servicios básicos, así como la ausencia de representación estatal por medio de instituciones, las cuales se encuentran bastante centralizadas en la Gran Área Metropolitana, difícilmente abarcando a las zonas costeras o territorios indígenas. También, es de resaltar la falta de oportunidades de desarrollo, inversión y empleo que generalmente caracterizan a las zonas rurales, y que en el caso costarricense no son una novedad.

Es así que, puede considerarse que esta falta de oportunidades y el abandono gubernamental generan un impacto de gran magnitud en la población que habita estas zonas, ya que las opciones de trabajo o estudio tienden a ser precarias, en pésimas condiciones estructurales e incluso sin posibilidad de crecimiento o movilidad en la sociedad. A falta de oportunidades, muchas mujeres se mantienen dentro del espacio privado o en el sector laboral informal, ejerciendo cada vez más el trabajo de cuidado en tiempos más prolongados, y más aún cuando el contexto de este se realiza dentro del círculo familiar, en donde “no debería” existir una excusa para no cuidar de dicho pariente.

De igual manera, resulta de interés comprender la dinámica en relación al porqué cuando las mujeres cuidadoras de zonas rurales logran incorporarse a otros espacios como el laboral, educativo, a alguna organización comunitaria, entre otros, implica que sea otra mujer del mismo círculo familiar la que asuma la responsabilidad del cuidado, es decir que se traspasa, o hereda, dentro de la misma familia, continuando con la línea de que las mujeres sean cuidadoras; por ejemplo, una mujer, jefa de familia, que debe delegar el cuidado de la persona dependiente a su madre, su hija, su hermana, cuñada

e incluso sobrinas para ella poder incorporarse a otros espacios, pero muy pocas veces a un integrante masculino de la familia, arriesgándose al juicio colectivo social y de su familia por no ser ella quien principalmente asume el cuidado.

De acuerdo con los planteamientos anteriores, como equipo investigador se cree una necesidad el hecho de investigar respecto del trabajo de cuidado como una tarea socialmente feminizada, tratando así de expandir el conocimiento que actualmente se posee, para lo cual se considera imperante el analizar esta problemática desde las voces de quienes la experimentan en sus vidas cotidianas: mujeres cuidadoras. Según lo anterior, se presentan a continuación las interrogantes y objetivos que pretenden guiar este proceso investigativo.

1.3. Preguntas de investigación

1.3.1. Interrogante general de investigación

¿De qué manera influyen las condiciones sociales, económicas y culturales de los espacios cotidianos de las mujeres que habitan en las zonas de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela en la reproducción de la feminización del trabajo de cuidado no remunerado?

1.3.2. Interrogantes secundarias de la investigación

- ¿De qué manera influyen los factores económicos estructurales en la distribución por género del trabajo de cuidados no remunerado?
- ¿Cómo las construcciones sociales y culturales de los espacios rurales de interés influyen en la distribución de las actividades de cuidado no remunerado entre mujeres que integran un mismo círculo familiar?
- ¿Cuáles aspectos de los espacios de la vida cotidiana de las mujeres que habitan las zonas rurales de interés se ven afectados por la incidencia de las actividades de cuidado no remuneradas?

1.4. Objetivos

A continuación, se exponen los objetivos que guiaron el proceso de investigación teórica y sus respectivos trabajos de campo y análisis.

1.4.1. Objetivo General

Analizar la incidencia que tienen las particularidades sociales, económicas y culturales en la reproducción de la feminización del trabajo de cuidados no remunerado en los espacios de la vida cotidiana de las mujeres cuidadoras de

personas adultas mayores en los distritos de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela.

1.4.2. Objetivos específicos

- Analizar la influencia de los factores económicos estructurales en la distribución por género del trabajo de cuidados no remunerado.
- Establecer la relación entre las construcciones sociales y culturales de los espacios rurales de interés en la distribución de las tareas de cuidado no remuneradas entre mujeres que integren un mismo círculo familiar.
- Identificar los espacios de la vida cotidiana de las mujeres que habitan las zonas rurales que se ven afectados por la incidencia de las actividades de cuidado no remuneradas.

1.5. Estado de la cuestión

El presente apartado da a conocer los alcances y hallazgos de investigaciones en torno a las temáticas de interés para la elaboración de la investigación, las cuales, fueron identificadas por medio de una revisión bibliográfica. Por ello, para contextualizar y organizar el estudio realizado, se parte de dos categorías de análisis: la división sexual del trabajo y mujeres: cuidado y ruralidad.

Así mismo, los documentos consultados posibilitaron la delimitación sobre los aspectos estudiados desde la perspectiva de Trabajo Social, Enfermería, Sociología, Gerontología, entre otros; por consiguiente, se utilizaron trabajos finales de graduación a nivel nacional, tomando en cuenta la Universidad de Costa Rica, Universidad Nacional, Universidad Estatal a Distancia y otros artículos a nivel internacional, para un total de nueve documentos.

De acuerdo con lo anterior, en el apartado de anexos se exponen detalladamente los aspectos de interés de cada fuente consultada, en forma de matrices de análisis, las cuales permitieron conocer lo que se ha investigado en torno al sujeto, al objeto de estudio, los vacíos y los debates que se encuentran en torno al tema investigado. (ver Anexos #1, #2 y #3)

1.5.1. La división sexual del trabajo

La división sexual del trabajo es una categoría de vital importancia para este análisis investigativo que se enfoca en la feminización del cuidado, ya que posibilita realizar una indagación previa sobre lo que se conoce hasta el momento acerca del tema.

Por lo tanto, un documento valioso es el estudio realizado por Jenice M. Vázquez

Pagán, en el 2018 titulado **“La división sexual del trabajo y el trabajo no remunerado del hogar en la sociedad puertorriqueña: experiencias de múltiples jornadas de trabajo”**, el cual partió de las percepciones y experiencias de las personas participantes sobre el concepto de trabajo no remunerado del hogar, en donde dichas percepciones reflejan la división sexual del trabajo y cómo el uso del tiempo en las tareas del hogar tiene efectos en la salud y en el desarrollo laboral.

En este sentido, la autora expone que el trabajo no remunerado desde su construcción implica un deber, una condición de obligatoriedad, un trabajo vinculado a la cotidianidad y al espacio personal o familiar, vinculado con las mujeres. El cual es concebido como arduo, fuerte, trabajoso, que requiere que se realice los siete días de la semana, las veinticuatro horas del día. Es decir, las experiencias de las personas entrevistadas en esta investigación revelan “la persistencia del rol tradicional asignado a las mujeres como cuidadoras, encargadas de la crianza de los hijos e hijas y de los viejos y viejas, enfermos y enfermas de la familia, entre otros” (Vázquez, 2018, p. 125).

Esta misma autora continúa afirmando que la asignación de las tareas no remuneradas del hogar y las tareas de cuidado a las mujeres forma parte de esa construcción social, que devalúa e invisibiliza las tareas del hogar, de la esfera privada. Esto se refleja en las políticas sociales, las cuales no proveen los arreglos necesarios para que las mujeres puedan armonizar los múltiples roles en los que se desempeñan.

Por tanto, Vázquez (2018) concluye en que la apropiación del trabajo doméstico no remunerado por parte del sistema capitalista se convierte en un acto de violencia económica, una forma de explotación y discriminación hacia las mujeres. Esto en la medida en que las responsabilidades domésticas no remuneradas y no compartidas afectan la cotidianidad de las mujeres, afectando sus oportunidades laborales, incidiendo en la toma de decisiones de las mujeres, en el desarrollo de sus potencialidades como seres humanos y condena a la mayoría a vivir en condiciones de pobreza.

Puede destacarse también el aporte generado por Paola Melo Morales en su tesis de grado titulada **“Y si ambos trabajan, que sucede en el hogar: división sexual del trabajo en hogares con doble proveedor en Cali”**, elaborada en Colombia para el año 2017. La autora desarrolla el documento respecto de las prácticas y significados que adquiere el trabajo tanto en la actividad laboral como en el hogar (trabajo doméstico y de cuidado), a partir de la indagación sobre los cambios producidos en el modelo de familia tradicional y el grado de igualdad de género que actualmente se ha alcanzado en el mercado laboral y en la familia.

La autora resalta que, pese a que la mujer ha logrado una mayor participación en el mercado laboral, no por eso deja de ser quien asume la mayor carga del trabajo doméstico y de cuidado, llevando consigo una doble o triple jornada de trabajo, ante lo

cual considera que los hogares conformados por parejas con doble proveedor (tanto hombre como mujer) se caracterizan por presentar condiciones de vida heterogéneas.

Finalmente, se muestran los diferentes arreglos familiares y estrategias bajo las cuales se distribuyen las tareas del hogar en una situación de doble proveeduría, en el cual, convergen, condiciones más desiguales, asociadas a ciertos factores que posibilitan o favorecen una reducción del trabajo de la mujer en el hogar, estos corresponden a: el nivel educativo, el ciclo de vida familiar, y las condiciones laborales (posición ocupacional, ingresos, jerarquía, estabilidad y tiempo laboral).

Por otro lado, José Siles González y Carmen Solano Ruiz brindan un valioso aporte sobre el tema de la división sexual del trabajo en su artículo titulado “**Estructuras sociales, división sexual del trabajo y enfoques metodológicos. La estructura familiar y la función socio-sanitaria de la mujer**” para la Revista de Enfermería: Investigación y Educación, elaborado en Colombia en el año 2007, ya que los autores destacan que la división sexual del trabajo como tipología organizativa, se encuentra basada en diferencias de género, ha rebasado los límites de la estructura familiar, por ello sostienen que el rol como persona cuidadora de la mujer es consecuencia del proceso de socialización familiar.

Continuando con sus planteamientos, Siles y Solano (2007) exponen que el reparto de tareas domésticas establecido para la organización familiar es, en gran medida, consecuencia de la división sexual del trabajo. Es así que, en procesos como la jerarquización y reparto de roles, la mujer ha sido considerada cuidadora y criadora, y mediante un mecanismo de proyección cultural, estos roles se han mantenido durante siglos, obstaculizando el proceso de profesionalización para las mujeres.

Asimismo, un aporte significativo de Natalia Fuentes Arenas y Carolina Garcés Estrada para la revista Anales en Gerontología, en el 2020, con el artículo “**Las Desigualdades del Trabajo de Cuidado: Significados y Prácticas de Cuidadoras Principales de Personas Adultas Mayores en Situación de Dependencia**”, expone que la falta de apoyo y de atención que existe en las comunidades respecto a la población adulta mayor en situación de dependencia, ha provocado que el cuidado sea designado a las mujeres; aun cuando esta persona pueda estar necesitando de un cuidado más profesional en términos médicos, esta falta de recursos de apoyo restringe este acceso a personal calificado.

En esta misma línea relacionada a la falta de apoyo, las autoras resaltan la poca eficiencia en términos de políticas públicas que respondan, de forma satisfactoria, las demandas y necesidades tanto de las personas en situación de dependencia, como de aquellas que se encargan de ejercer el cuidado de estas. En este sentido, las políticas públicas son pocas o, dependiendo del enfoque, nulas, provocando que todos los

gastos y aportes deban ser costeados por las familias, incluso forzando a la mujer cuidadora a asumir triple jornada para mantener económicamente a su hogar y familia, a la persona adulta dependiente, y a sí misma como tal.

Otro aporte significativo de estas autoras puede verse en la banalidad con la que se analiza el tema del cuidado femenino para con estas poblaciones, esto en tanto se tiende a considerar que el hecho de asumir el cuidado se hace debido al cariño, al amor, al “instinto maternal” de las mujeres, y no como una problemática nutrida por la división sexual y social del trabajo, la cual vulnerabiliza a las mujeres.

Otro aporte significativo es la Tesis de Maestría en Enfermería titulada **“La experiencia de cuidar a una persona con Alzheimer por parte de un ex cuidador primario”**, elaborada por Beatriz Bernal López en México para el año 2013. En este trabajo, la autora resalta, haciendo uso de datos de la Organización Mundial de la Salud (OMS) exponiendo que el grupo de personas que padecen de enfermedades crónicas degenerativas al grado de poder ser declarado como una pandemia, son un grupo que implica en sí mismo, un aumento significativo en la necesidad de personas cuidadoras.

Por esto resalta que, los procesos de cuidado en este tipo de casos están sumamente centralizados en la persona que ejerce el trabajo de cuidado, es decir, que todo el proceso, la acción y las decisiones que implica este tipo de trabajo son depositados en una sola persona, abriendo la posibilidad de que existan relaciones de poder que ponen en peligro a la persona a cargo, afectando su calidad de vida y el cumplimiento de sus derechos humanos.

La autora también expresa que existen severas debilidades tanto en la cantidad de estudios que abarquen el tema, en especial de aquellos enfocados en la persona cuidadora y como esta continúa su vida posterior al cuidado.

Finalmente, se encuentra el estudio de Paola Bonavitta (2020) denominado **“Cuidados (invisibles) y cuerpos para otros. Un estudio de caso de mujeres de Córdoba, Argentina”** para la revista *Cuadernos Intercambio sobre Centroamérica y el Caribe de la Universidad de Costa Rica*. Resulta ser un insumo medular para esta investigación, debido a que resalta cómo el sistema patriarcal ha logrado que social y culturalmente se naturalice la concepción de que existe un maternalismo y un valor nutricional asociado directamente a la mujer por su capacidad biológica de parir y el no disponer de ello niega su condición esencial.

Esto ha provocado que a la mujer se le subordine a la esfera privada, donde es destinada a lo doméstico, al cuidado, a la reproducción, a la nutrición, tareas que no se concebían socialmente como un trabajo en sí, pero que se asumen como actividades obligatorias de las mujeres. Y “quienes no cumplen con ese trabajo son

seres incompletos, confundidos, alterados, rebeldes sin causa frente a lo que les toca como destino” (Bonavitta, 2020, p. 15).

Asimismo, este estudio revela que las mujeres son un elemento vital para el sostén del capitalismo debido a que asume de manera gratuita tareas domésticas y de cuidado de hijos, hijas, personas enfermas y adultos y adultas mayores dependientes.

Por lo tanto, la feminización del cuidado ha provocado que ellas cumplan con dobles y triples jornadas laborales, en algunos casos sin recibir remuneración alguna, y ellas continúan siendo, dando y estando para los demás.

1.5.2. Mujeres, cuidado y ruralidad

La categoría de mujeres, cuidado y ruralidad es de suma importancia abordarla como elemento de análisis que se dirige a enfatizar en aspectos que tiene que ver con la visibilización de las mujeres en la ruralidad y el trabajo de cuidado que ejercen todo esto por medio de investigaciones acerca de lo que se conoce sobre esta categoría.

Con relación al tema, se encontró el Trabajo Final de Grado para optar por la Maestría en Desarrollo Social en la Universidad Nacional de Costa Rica, denominado **“La Red de Mujeres Rurales: La experiencia de organización. Estudio de caso en los Cantones Los Chiles-Upala, Siquirres y Buenos Aires”**, realizado por Alejandra Bonilla en el año 2017. Este representa un estudio donde se da a conocer que las mujeres en zonas rurales presentan fuertes restricciones en cuanto a la toma de decisiones sobre sus cuerpos y sus vidas. Además, expresa que la autonomía ante los bienes y el acceso a servicios se ven cada vez más limitados para las mujeres, principalmente.

Al mismo tiempo, Bonilla (2017) señala que el trabajo de las mujeres ha aumentado con la crisis del sistema, lo que se traduce en un mayor control sobre las mujeres y su trabajo, el cual, continúa siendo no remunerado en muchos casos. La autora recalca que las condiciones de las mujeres campesinas costarricenses son bastante similares a las de otras mujeres campesinas en Latinoamérica. De manera que, la investigación pone de manifiesto que, gracias al desarrollo y expansión del feminismo en la región, las mujeres campesinas han encontrado formas de organización en pro de sus diversas demandas sociales y políticas.

Otra de las investigaciones consultadas fue el Trabajo Final de Graduación para optar por el título de Licenciatura en Trabajo Social que lleva como título **“Red de Atención Progresiva para el Cuido Integral de las Personas adultas Mayores: Programa Red de Cuido”**, llevado a cabo por Virginia Bolaños en el año 2017, identifica que las zonas rurales representan porcentajes altos de pobreza afectando mayormente al

género femenino, siendo una problemática prioritaria para que el Estado y la sociedad civil desarrollen programas solidarios.

Por esto, destaca que se ha ampliado la oferta laboral femenina en el país, pero que no todas las mujeres logran incorporarse al mercado laboral, debido a situaciones como el cuidado de personas dependientes, y por condiciones sociales donde el sexo femenino asume la responsabilidad de las tareas de cuidado de la familia y la reproducción social, arrojando como resultado que esto se deba a la asignación de roles socialmente definidos e implantados, lo cual repercute en las oportunidades laborales que las mujeres tienen.

Por último, Bolaños (2017) expone que la ruralidad, históricamente ha sido una zona geográfica en la cual el acceso a servicios básicos y hasta los derechos como lo son la educación y la salud llega a ser difícil y deficiente, colocando a las poblaciones como mujeres y adultos mayores en condiciones de desigualdad, donde gran parte de la sociedad en general desconoce información sobre los derechos de las personas adultas mayores y por ende, se da una ausencia de la defensa de sus derechos.

Finalmente, es relevante destacar el aporte generado por Michael Enrique Marín Rojas y Natasha Sandino Ulloa en su tesis denominada ***“Espacios de reproducción de la fuerza de trabajo de personas jóvenes rurales provenientes de economías familiares campesinas del cantón de Zarcero”*** realizada en el 2014 para optar por el grado de Licenciatura en Trabajo Social en la Universidad de Costa Rica. Este estudio expone un estudio sobre jóvenes dedicadas a aquellos trabajos que se han considerado socialmente “para las mujeres”, como la prestación directa de servicios a personas; dentro de las cuales podría incluirse las trabajadoras domésticas, mujeres que cuidan niños, niñas y personas adultas mayores.

A su vez, Marín y Sandino (2014) exponen que los espacios domésticos son de total predominancia para las mujeres e hijas, en los cuales se reproducen labores asignadas socialmente, y esto se intensifica aún más en la cotidianidad del espacio rural, debido a factores culturales, económicos y sociales que intervienen de manera constante y natural en el hecho de que ellas se vean en la obligación de asumir múltiples labores. Aunado a lo anterior, la y el autor resalta que, la importancia y el valor del trabajo femenino remunerado y no remunerado que provocan una sobrecarga laboral para ellas, no es reconocido dentro de la sociedad, a pesar de los múltiples sacrificios que esto conlleva para las mujeres, provocando así una tendencia a disminuir el valor personal de las mujeres, y el valor económico que ellas aportan para el sistema económico y social.

Asimismo, Marín y Sandino (2014) afirman que el mismo sistema capitalista neoliberal que domina en la sociedad se ha encargado de ocultar la doble y triple jornada que desempeñan las mujeres, predominantemente de aquellas que se desenvuelven en el

ámbito rural, donde las tareas de cuidado de hijos e hijas, además de las de cuidado de personas dependientes como adultos mayores, se consideran como una extensión de lo doméstico.

Los autores también destacan que existe un discurso que enfatiza en que la labor de las mujeres pertenece al hogar; por lo tanto, según lo que el estudio arroja es que se asume que las labores domésticas y a su vez las de cuidado son su responsabilidad, lo que ocasiona un conflicto si ellas desean salir de este espacio; de manera que, no existe una retribución justa de la sobrecarga laboral de la mujer y el verdadero reconocimiento que merecen ante su entrega a la familia, por lo que, las actividades domésticas son casi nulas en el caso de los hombres.

A su vez, estas labores desempeñadas por las mujeres son útiles e indispensables para el mantenimiento del sistema capitalista. Esto debido a que ellas realizan labores de producción y reproducción de la fuerza de trabajo, las cuales en la mayoría de los casos no son remuneradas. Por lo que, se invisibiliza el trabajo femenino mientras que también saturan sus jornadas laborales, sacando el mayor provecho de las mujeres. Entonces, para Marín y Sandino (2014) el trabajo extra doméstico podría constituirse en una forma de explotación para las mujeres ya que, aparte de tener que realizar las labores domésticas, se unen a una doble jornada laboral e incluso ampliándose a una triple.

CAPÍTULO IV

ESTRATEGIA METODOLÓGICA

En este apartado se presenta la estrategia metodológica seleccionada para la elaboración de esta investigación, en virtud de orientarla hacia el cumplimiento de los objetivos propuestos. Para ello, se expone primeramente la percepción como equipo investigador respecto de la población participante y el objeto de estudio que se ha planteado, esto a través de las premisas ontológicas y epistemológicas. Además, se detallan los aspectos correspondientes al enfoque metodológico, la población participante y sus criterios de selección, las fases y técnicas del proceso investigativo, operacionalización de categorías y el cronograma de actividades.

4. 1. Premisas Ontológicas

Este apartado contiene las premisas ontológicas y epistemológicas que guían la forma de analizar el objeto de estudio; por tanto, nos sustentamos bajo el feminismo como enfoque teórico, ontológico y epistemológico clave para entender por qué este es un proceso de carácter estructural dentro de la realidad.

Para empezar, se debe de considerar que la feminización del trabajo de cuidado ha tenido un carácter socio-histórico, el cual implica que la realidad que experimentan las mujeres en zonas rurales, sus condiciones de vida, las relaciones, entre otras particularidades, sean producto de momentos históricos que han existido, y que en la dinámica social han evolucionado y transformado dichas situaciones o fenómenos sociales. De acuerdo con esto, la realidad es concebida, por nosotras, como compleja, muy cambiante, y a partir de la dinámica social que se desarrolle en el momento, es que se logran producir (y reproducir a futuro) una serie de vínculos y relaciones en torno a los roles de hombres y mujeres, y al gran capital.

En razón con lo anterior, al ubicarse en la actualidad y en el espacio en que las mujeres convergen en condiciones materiales e ideológicas que reproducen la opresión sobre ellas, en tanto lo económico y productivo se posicionan como lo principal para el desarrollo de la vida; mientras que lo ideológico, se da a través de las relaciones sociales, la cotidianidad y las instituciones sociales, medios de comunicación, el Estado y demás, las cuales, han implantado en la conciencia de las personas lo doméstico como un atributo natural e innato de las mujeres, como si dar a luz las capacitará para asumir labores de cuidado y domésticas sin considerar los otros espacios de la sociedad a los que pueden pertenecer.

En este sentido, se toma en consideración que, como equipo investigador, la feminización de las actividades de cuidado no es concebida como una situación aislada o cuya causa sea tan superficial al punto de “arreglarse” con una redistribución de tareas, sino que, muy por el contrario, este fenómeno corresponde a una construcción histórica, e indiscutiblemente material, que ha impactado en la vida cotidiana de las mujeres, determinando ciertas formas de establecer relaciones sujeto-entorno, y manteniéndose a través del tiempo como un elemento constante en las relaciones entre los seres humanos.

Este tipo de lógica no es siempre perceptible, ya que se aprecia hasta en lo más concreto y naturalizado aquello que puede ser experimentado en la realidad cotidiana, por tanto, es importante resaltar que en este trabajo se otorga una importancia vital a lo que puedan expresar las mujeres rurales, ya que su conocimiento y experiencia trasciende lo individual y revela esta dinámica histórica y cambiante.

Desde la perspectiva del enfoque feminista es que se comprende que el género influye en las concepciones del conocimiento, en la persona que conoce y en las prácticas de investigar, preguntar y justificar. Identifica las concepciones dominantes y las prácticas de atribución, adquisición y justificación del conocimiento que sistemáticamente ponen en desventaja a las mujeres.

Es así que, como equipo de trabajo se asume que las mujeres como sujetas sociales de derechos, poseedoras y productoras de conocimientos que, a través de sus experiencias y percepciones, revelan una realidad que ha sido naturalizada y a su vez invisibilizada desde la lógica del sistema económico capitalista, ya que a través del cuidado feminizado se continúa produciendo y reproduciendo la lógica de acumulación de capital y cómo lo expone el enfoque feminista implica una redefinición desde el punto de vista femenino con la finalidad de que visibilicen las estructuras ocultas de dominación y explotación que existen y dan origen y sentido a la feminización del cuidado y trascendiendo lo subjetivo que en él se presenta.

Esto se evidencia en el hecho de que se les excluye de la investigación, se les niega que tengan autoridad epistémica, se denigran los estilos y modos cognitivos femeninos de conocimiento, se producen teorías de las mujeres que las representan como inferiores o desviadas con respecto al modelo masculino, se producen teorías de fenómenos sociales que invisibilizan las actividades y los intereses de las mujeres o a las relaciones desiguales de poder genéricas, y se produce conocimiento científico y tecnológico que refuerza y reproduce jerarquías de género.

4.2. Enfoque Epistemológico

Para poder analizar la realidad de las mujeres que han tenido que asumir el cuidado de sus familiares, como acción totalmente feminizada, es necesario tomar en consideración los aportes del enfoque denominado feminismo. Este enfoque permite tomar las experiencias que estas mujeres han tenido y el significado que esta labor ha implicado en sus vidas y espacios sociales, trascendiendo de lo subjetivo con el fin de revelar las bases estructurales y los elementos socio históricos que han dado sentido a los espacios en los que se desenvuelven las mujeres y que marcan sus vidas cotidianas.

Asimismo, dicho enfoque, a grandes rasgos, corresponde a la teoría feminista respecto a la participación de la mujer en las relaciones sociales generadas por el sistema capitalista, así como también las dinámicas de poder y explotación presentes en el contexto histórico, político, económico, social y cultural. Por tanto, profundiza en la dinámica del sistema, desde la realidad que experimentan las mujeres, la cual difiere a la de los hombres como tal, aspecto que resulta necesario para evidenciar dichas faltas y proponer alternativas desde el proceso de investigación.

Según expone Norma Blázquez (2012), el feminismo aporta enormemente al proceso investigativo con esta población en tanto este enfoque epistemológico analiza:

[...] abordando la manera en que el género influye en las concepciones del conocimiento, en la persona que conoce y en las prácticas de investigar, preguntar y justificar. Identifica las concepciones dominantes y las prácticas de atribución, adquisición y justificación del conocimiento que sistemáticamente ponen en desventaja a las mujeres porque se les excluye de la investigación, se les niega que tengan autoridad epistémica, se denigran los estilos y modos cognitivos femeninos de conocimiento, se producen teorías de las mujeres que las representan como inferiores o desviadas con respecto al modelo masculino, se producen teorías de fenómenos sociales que invisibilizan las actividades y los intereses de las mujeres o a las relaciones desiguales de poder genéricas, y se produce conocimiento científico y tecnológico que refuerza y reproduce jerarquías de género. (p.22)

Lo anterior evidencia que, el enfoque feminista articula la importancia de priorizar los discursos desde las propias voces y experiencias de las mujeres, lo cual, permite tanto la construcción de conocimiento como la priorización de sus experiencias en los espacios a partir de sus cotidianidades, validando su trabajo y su importancia en la sociedad, permitiendo trascender de lo subjetivo.

Estos aspectos corresponden también a la epistemología feminista en tanto esta se encuentra orientada hacia la producción de conocimiento a partir de sus vivencias sobre los diversos espacios que integra, o de los que se ha visto excluida, en una relación de desigualdad en contraposición a teorías en las cuales la mujer no es concebida como sujeta cognoscente, por tanto, sus experiencias no son insumo para la investigación social.

Con respecto a esto, Hartman (1996) expone que al recurrir al feminismo nos direccionamos a priorizar elementos en particular como lo es el método histórico y materialista, la identificación del patriarcado como una estructura social e histórica que provoca la exclusión y confinamiento de la mujer dentro del desarrollo de las sociedades capitalistas occidentales.

Por esta razón, al analizar la feminización del cuidado en la ruralidad desde este enfoque epistemológico permite comprender los procesos estructurales e históricos que marcan los espacios de la vida cotidiana de las mujeres; por tanto, los postulados y el análisis que realiza nos dirigen hacia una comprensión de las múltiples desigualdades que las mujeres enfrentan en la cotidianidad producto del sistema capitalista.

Debido a esto, al considerar elementos claves del enfoque feminista como quién se beneficia de la fuerza de trabajo de la mujer, el desarrollo histórico; por mencionar algunos ejemplos; se considera fundamental este aporte debido a que analiza las perspectivas de las mujeres cuidadoras, evidenciado el despliegue de múltiples elementos que convergen en su cotidianidad y en el espacio en el que las mujeres rurales se desenvuelven.

A su vez, permite analizar desde una perspectiva más completa, el cómo ellas concilian, sobreviven y rompen con esos patrones estructurales, ya que, al considerarlas, desde dicha corriente epistemológica, como sujetas protagonistas, poseedoras de conocimientos; logrando con ello analizar esos elementos históricos que condicionan sus vidas, para así visibilizar la realidad oculta de la feminización del cuidado.

4.3. Enfoque metodológico

La metodología seleccionada para llevar a cabo la presente investigación es de tipo cualitativa, donde según Sandoval (1996)

[...] la óptica de tipo cualitativo comporta, en definitiva, no solo un esfuerzo de comprensión, entendido como la captación, del sentido de lo que el otro o los otros quieren decir a través de sus palabras, sus silencios, sus acciones y sus inmovilidades a través de la interpretación y el diálogo, si no también, la posibilidad de construir generalizaciones, que permitan entender los aspectos comunes a muchas personas y grupos humanos en el proceso de producción y apropiación de la realidad social y cultural en la que desarrollan su existencia (p. 3).

Es así como, este enfoque brinda una serie de aportes relevantes, entre los que destacan un mayor acercamiento y profundización de temas con las sujetas de estudio y los significados que ellas le dan a la feminización del cuidado, entre otros. Por lo que, al tomar en cuenta los aportes y analizarlos desde un enfoque feminista se logra trascender de las subjetividades y así revelar las cotidianidades de las mujeres cuidadoras bajo un sistema estructural que determina sus condiciones de vida y espacios de la vida cotidiana.

Así mismo, la investigación cualitativa permite un análisis y una construcción de conocimiento a partir de las perspectivas que las mujeres rurales puedan, y deseen, compartir con las investigadoras. De acuerdo con esto, según Vasilachis (2006) este enfoque analiza el conocimiento de las y los actores sociales y sus prácticas, teniendo en cuenta que, en el terreno, los puntos de vista y las prácticas son distintos debido a las diferentes perspectivas subjetivas y las disparidades en conocimientos sociales vinculados con ellas y que además forman parte de su contexto

En este sentido, para las investigadoras es de gran interés, y de cierta forma casi una necesidad, que sean las mujeres quienes den sentido a la realidad que analizamos desde una perspectiva que vive propiamente la problemática expuesta, aumentando así no solamente el conocimiento y análisis que se genera en torno al problema en la sociedad, sino también ese acercamiento y mejoría en el proceso formativo y participativo que tanto ellas como nosotras podemos obtener al ser parte.

Finalmente, a través de este análisis de experiencias que posibilita el enfoque cualitativo es que se logrará profundizar en aspectos socio históricos y estructurales que han intensificado la feminización del cuidado en las zonas rurales y legitimado su perdurabilidad durante generaciones.

4.4. Población participante

Para efectos de la presente investigación se contó con la participación de seis mujeres que cumplieron con los criterios de selección inclusión y exclusión, y por tanto, el papel de cuidadoras de personas adultas mayores habitantes de zonas rurales de los cantones de Barranca de Puntarenas, Ángeles Norte y La Paz de Piedades Norte de San Ramón de Alajuela; al ser elegidas brindaron una serie de insumos con la finalidad de realizar el análisis sobre la feminización del cuidado no remunerado. Esta selección se realiza en base a los siguientes criterios:

Tabla 1. Criterios de selección de la población participante

Criterios de Selección

1. Las participantes deberán, preferiblemente, encontrarse dentro de un rango de mayor de 18 años y menor de 70 años.
2. Que las participantes tengan a su cargo el cuidado de algún familiar adulto o adulta mayor, ya que, es medular y determinante en la cotidianidad de las mujeres
3. Las mujeres deben de ejercer un cuidado de 6 horas diarias en adelante.
4. Se considerarán otros informantes claves como: profesionales en Trabajo Social de la Caja Costarricense del Seguro Social, específicamente en la clínica de Barranca de Puntarenas y los EBAIS de Ángeles Norte y el de Piedades Norte de San Ramón.
5. Las zonas rurales deberán contar con las características que les competen a las zonas rurales en nuestro país, por ejemplo: poca presencia de instituciones públicas o privadas (de cualquier tipo), poca población, difícil acceso a servicios, entre otros.
6. Que el tipo de trabajo de cuidados ejercido sea no remunerado.
7. Las mujeres participantes no deben de tener alguna otra ocupación a parte del cuidado de las personas adultas mayores.
8. Las participantes deberán ser residentes de zonas rurales de los distritos de Barranca de Puntarenas, Ángeles Norte y Piedades Sur de San Ramón Esto debido al interés de nosotras cómo investigadoras de obtener datos desde su cotidianidad y espacio, ya que existe un vacío investigativo en estas áreas.

La población que participó en la elaboración de este estudio fue de 6 mujeres en total, las cuales se caracterizaron de la siguiente forma:

Tabla 2. Caracterización de la población participante

Caracterización de la población

Susana	<p>Edad: 55 años</p> <p>Estado civil: Casada</p> <p>Situación laboral: Trabajadora Doméstica no remunerada</p> <p>Nivel educativo: Primaria</p> <p>Persona a quién cuida: Madre</p> <p>¿Cuántos hijos/hijas?: 3 hijos</p> <p>Años realizando el trabajo de cuidado: Aproximadamente 35 años</p> <p>Tipo de cuidado: Tiempo completo</p>
Karen	<p>Edad: 57 años</p> <p>Estado civil: Soltera</p> <p>Situación laboral: Docente y cuidadora no remunerada</p> <p>Nivel educativo: Universitaria</p> <p>Persona a quien cuida: Madre</p> <p>¿Cuántos hijos/hijas?: Ninguno</p> <p>Años realizando el trabajo de cuidado: Aproximadamente 7 años</p>

	<p>Tipo de cuidado: Medio tiempo</p>
María	<p>Edad: 64 años</p> <p>Estado Civil: Casada</p> <p>Situación Laboral: Trabajadora Doméstica no remunerada</p> <p>Nivel educativo: Escolar</p> <p>Persona a quien cuida: Antes madre y ahora esposo</p> <p>¿Cuántos hijos/hijas?: 6 hijos e hijas</p> <p>Años realizando el trabajo de cuidado: Aproximadamente 20 años</p> <p>Tipo de cuidado: tiempo completo.</p>

Noelia	Edad: 48 años Estado Civil: casada Situación Laboral: Trabajadora Doméstica no remunerada Nivel educativo: Universitaria Persona a quien cuida: Madre ¿Cuántos hijos/hijas?: 1 hija Años realizando el trabajo de cuidado: Aproximadamente 1 año Tipo de cuidado: Medio tiempo - tiempo completo.
Tatiana	Edad: 62 años Estado Civil: Casada Situación Laboral: Cuidadora en hogar comunitario. Nivel educativo: Secundaria completa. Persona a quien cuida: Esposo ¿Cuántos hijos/hijas?: 2 hijas Años realizando el trabajo de cuidado: 25 años. Tipo de cuidado: Tiempo completo
Lili	Edad: 48 años Estado Civil: Unión Libre
	Situación Laboral: secretaria y cuidadora Nivel educativo: Universidad Persona a quien cuida: Madre ¿Cuántos hijos/hijas?: 1 hija Años realizando el trabajo de cuidado: 10 años Tipo de cuidado: Medio tiempo-tiempo completo

De acuerdo con los datos suministrados, la población participante de la investigación estuvo conformada por un total de 6 mujeres costarricenses, con edades entre los 48 y los 64 años. Las participantes, como se había decidido en la fase metodológica, son habitantes de zonas rurales como La Paz y Ángeles Norte de San Ramón de Alajuela, y Barranca de Puntarenas. Cabe destacar que todas las participantes son practicantes de la religión católica.

Las 6 participantes tenían a cargo el cuidado de una persona adulta mayor a medio tiempo o tiempo completo, entre quienes destacan las madres de las participantes o

sus esposos y ex esposos. Además, 5 de las 6 participantes son madres de por lo menos 1 hija o hijo. Por otro lado, 3 participantes son trabajadoras domésticas no remuneradas, mientras que los 3 restantes tienen una ocupación remunerada entre ellas la docencia, secretariado y administración, destacando así las múltiples jornadas de trabajo.

Lo anterior permite considerar que las labores del trabajo de cuidado tienen un rostro no solamente femenino, sino adulto, puesto que las participantes fueron mujeres que sobrepasan los 40 años de edad; incluso algunas se acercan a la tercera edad, quienes, además, mantienen el trabajo de cuidado como parte de las responsabilidades que tienen para con sus redes de apoyo familiares, independientemente de la afinidad o la fuerza de los vínculos que tengan con estos familiares.

También se debe destacar el hecho que fueron pocas las participantes que pudieron afirmar tener un apoyo sólido por parte de sus familias y/o comunidades, describiendo situaciones sumamente conflictivas en cuanto a la distribución de responsabilidades de cuidado y sobre las afectaciones que tiene la sobrecarga de labores para ellas. Este aspecto permite reforzar el planteamiento de que el trabajo de cuidado continúa siendo un mandato social para las mujeres, aun cuando a nivel de la sociedad se considera como un “problema resuelto”.

4.5. Viabilidad

Como parte de los criterios de viabilidad, fue necesario considerar que, como grupo investigador, se tuvo presente que ya se habían realizado diversas investigaciones con la población femenina en años anteriores, además de tener experiencias familiares o cercanas cuando no había vínculo alguno, relacionadas al cuidado de otros familiares adultos y adultas mayores, por lo que trabajar tanto con la temática como con la población tenía cierto grado de afinidad.

Por esta razón, al realizar el primer contacto con la población, fue necesario considerar tomar en cuenta que, en ocasiones, consultar sobre la dinámica familiar, sobre quién o quiénes asumen labores de cuidado, resulta un tanto incómodo o invasivo para muchas personas; por esta razón, se consideró mucho más viable el anunciar públicamente, por medio de redes sociales personales el objetivo de la investigación y la petición a que la población sea parte de esta, si así lo desea. Una vez realizado esto, se contó con los respectivos consentimientos por parte de las cuidadoras participantes (o de algún familiar en caso de ser necesario), para así darle inicio el proceso de recolección de información.

4.6. Técnicas de recolección de datos

Como parte del acercamiento a la realidad de las mujeres cuidadoras en zonas rurales; fue relevante llevar a cabo la recopilación de datos, a partir de 3 técnicas: entrevista a profundidad y observación no participante; las cuales, permiten el acercamiento con la población, llevar a cabo un proceso mucho más flexible y una articulación con la teoría con el propósito de enriquecer el análisis final.

4.6.1. Entrevista a profundidad

De acuerdo con Taylor y Bogdan (2002) esta es una técnica que involucra “reiterados encuentros cara a cara entre el investigador y los informantes, encuentros éstos dirigidos hacia la comprensión de las perspectivas que tienen los informantes respecto de sus vidas, experiencias o situaciones, tal como las expresan con sus propias palabras” (p. 101). Por tanto, esta técnica permite adentrarnos a la realidad de los espacios de la vida cotidiana de las mujeres, lo cual abre una amplia ventana de elementos vitales para el desarrollo de este proceso de investigación.

A través de las opiniones, experiencias y perspectivas de las mujeres cuidadoras de zonas rurales, a quienes se encuentra dirigida y tiene la finalidad de lograr analizar en qué manera se expresa la feminización del cuidado en los espacios cotidianos de ellas y las implicaciones que este tiene en ellas.

Así mismo, esta técnica permite la obtención de información clave para problematizar y así comprender las bases estructurales de este fenómeno, más allá de percibirlo desde un discurso superficial, lo que visibiliza la manera en que las condiciones estructurales propias del sistema capitalista y patriarcal condicionan la vida de las mujeres.

4.6.2. Observación no participante

También fue seleccionada entre las técnicas la observación no participante, la cual, según Díaz (2011) “(..) es aquella en la cual se recoge la información desde afuera, sin intervenir para nada en el grupo social, hecho o fenómeno investigado” (p. 8). En este sentido, como investigadoras, no se adentró o irrumpió en la dinámica familiar de las mujeres participantes para ejercer el cuidado de sus familiares en conjunto con ellas, ni se modificó de alguna forma, sino que; se dio un acercamiento a la dinámica para poder entenderla de una forma mucho más completa, apreciar la forma en que estas mujeres se desenvuelven en un espacio mucho más cómodo para ellas, pero sin ser necesariamente parte de ese vínculo familiar en que se da la relación de cuidado.

4.7. Fases de la investigación cualitativa

En el presente apartado se desarrollan las fases de la investigación cualitativa, enfoque seleccionado para realizar la investigación como tal. Se tiene contemplado un total de siete fases, las cuales detallan el proceso de investigación de forma ordenada.

4.7.1. Definición del tema y problema

Esta etapa del proceso de investigación se inició organizando una serie de reuniones virtuales, debido a la situación del COVID-19, para definir qué temas eran de mayor interés para el equipo investigador y qué problemas, interrogantes o situaciones eran necesarios de analizar.

De forma unánime se decidió elegir la población femenina como sujeto de análisis debido a la afinidad de las investigadoras para con la población. Asimismo, el equipo investigador decidió abordar la problemática de feminización del cuidado, debido a que es una temática poco discutida críticamente en la actualidad de la investigación académica, ya que se ha abordado, pero de manera un tanto superficial, especialmente para elaboración de datos cuantitativos.

Asimismo, surgió el interés por comprender este fenómeno desde las zonas rurales, ya que estas han tenido múltiples transformaciones en las últimas décadas, sin embargo, mantienen un rezago en cuanto al desarrollo que presentan y la intervención de los gobiernos ha sido escasa, invisibilizando las problemáticas de estas zonas, y más aún para una población con una realidad tan naturalizada.

Después de definir el tema, se inició la construcción del presente documento, comenzando con los apartados correspondientes a la justificación y el planteamiento del problema de investigación, para lo cual el equipo investigador consultó diversas fuentes nacionales e internacionales para exponer la importancia de la problemática del trabajo de cuidado y también de la investigación, lo cual permitió además ir estructurando las interrogantes y objetivos que guiaron el proceso.

Seguidamente, una vez definidos los objetivos e interrogantes, se procedió a profundizar directamente en el tema al buscar diversas investigaciones, artículos y documentos académicos (tanto nacionales como internacionales) para la elaboración de un estado de la cuestión, donde se recopilaron los aspectos de mayor importancia en cuanto a la población de interés y sobre la problemática misma. Del mismo modo se elaboró a partir de estos el referente contextual, el cual contiene información sobre instituciones, leyes, acuerdos, y demás, en relación a la temática del trabajo de cuidado, las mujeres como población de interés, y las zonas rurales.

Finalmente, a partir de lo analizado se establecieron diversas categorías teóricas, las cuales fueron el punto de partida para desarrollar la temática del trabajo de cuidado de forma más detallada, así como también se pudieron extraer los aspectos necesarios para la elaboración de los instrumentos para la fase de recolección de datos.

4.7.2. Elaboración del diseño

En esta fase se estableció el método de investigación, técnicas de recolección de datos, instrumentos de registro, las informantes y los criterios de selección, base a lo expuesto por Rodríguez et al. (1996).

En razón a esto, se encuentra el método de investigación, para lo cual el equipo investigador seleccionó el método cualitativo para elaborar la investigación, siendo este el más pertinente para responder al problema de investigación y los objetivos planteados, con la finalidad de comprender el objeto de estudio.

Posteriormente, se definió la caracterización de las personas que serían parte de la investigación, para lo cual, se eligen diversos criterios de selección (tanto de inclusión como de exclusión) que permitieron el conocimiento del objeto de estudio y el acercamiento a la realidad de las mujeres que fueron partícipes, además, entre los instrumentos que fueron de utilizados se encuentran la observación no participantes y las entrevistas a profundidad, las cuales, se adaptaron al contexto de las participantes para asegurarles un espacio seguro para exponer sus experiencias.

Finalmente, el instrumento de registro fue la técnica que se utilizó durante la recolección de datos, articulado con los instrumentos como el cuaderno de campo, la grabación de voz y la grabación de voz y vídeo. Para llevar a cabo cada una de ellas, una herramienta que funcionó como apoyo durante el proceso de recolección fue la aplicación de Zoom, en la cual, se llevaron a cabo 3 de las entrevistas, ya que según, los contextos dados, fue lo que facilitó la comunicación con las participantes y la recolección de la información. Con las demás participantes se utilizó la entrevista presencial.

4.7.3. Recolección de datos

Durante esta etapa se realizó la recolección de información a través de distintas técnicas como lo son la entrevista a profundidad y la observación no participante. Sin embargo, para iniciar se utilizó una técnica llamada “bola de nieve”, en la cual se le comentó a familiares y a amigos sobre esta investigación para que así ellos nos orienten para localizar las sujetas de estudio, es decir mujeres que realizan las labores de cuidado, en las comunidades de Barranca de Puntarenas y San Ramón y la Municipalidad de Puntarenas y San Ramón.

Para realizar el contacto con las participantes se pretende reclutarlas de forma presencial, al visitar las comunidades, con todas las medidas de sanidad necesarias. Asimismo, debido al contexto de pandemia por el virus Sars-CoV 2 que en ese momento no había finalizado, también se utilizó la herramienta de las redes sociales como forma de comunicarle a la población rural de Puntarenas y San Ramón sobre la búsqueda de mujeres cuidadoras. Luego, se seleccionaron seis de ellas de acuerdo con los criterios establecidos para este estudio.

Seguido este paso, se inició la entrada al campo al visitar a las mujeres seleccionadas con el fin de conocerlas, y que conocieran al equipo investigador, para así generar empatía y confianza entre ellas y las investigadoras. Asimismo, esta visita permitió coordinar el día, la hora y el sitio donde ellas se sintieran cómodas para realizar las entrevistas.

Finalmente, esta etapa fue indispensable para llevar a cabo la investigación, por lo que va de la mano con el análisis de datos, ya que permitió determinar si era necesario incorporar más mujeres informantes, identificar qué temas se debían de profundizar y a su vez posibilitó obtener validez de los datos.

4.7.4. Análisis de datos

El desarrollo de esta fase de investigación dio significado al problema de investigación por medio de la triangulación de la información que se obtuvo a través del trabajo de campo realizado, el análisis y la revisión bibliográfica. Para esto se categorizó la información respecto a cada objetivo de investigación con el fin de visualizar los datos de manera más específica y detallada.

4.7.5. Reducción de datos

Primeramente, se realizó la reducción de datos la cual consiste en separar y clasificar los datos obtenidos en criterios o temáticas de análisis. Para ello, se llevó a cabo una separación de unidades en la cual los datos son segmentados o divididos en unidades relevantes y significativas, como lo menciona Gil et al. (1994) en función de la temática abordada.

Seguidamente, se realizó una categorización la cual fue dividida 3 categorías que llevan como nombre: división sexual del trabajo, vida cotidiana y condiciones socio materiales de las mujeres cuidadoras, para luego agrupar en subcategorías aún más específicas, que permitió la visualización de la información de manera detallada y para así no omitir ningún dato importante que surgió durante la investigación.

4.7.6. Disposición y transformación de datos

Como afirman Gil et al. (1994) este elemento supone organizar los datos, presentarlos de forma espacial, ordenada y simplificada con el objetivo de presentar la menor cantidad de dificultades al momento de analizarlos y darle respuesta a lo que son las preguntas y objetivos de investigación. Para ello, en este proceso investigativo se utilizaron matrices o cuadros para el tratamiento de ciertos datos, los cuales se elaboraron de acuerdo a la necesidad oportuna que tuviera el equipo investigador para incluirlos, como por ejemplo la operacionalización de variables, la creación de cronogramas de actividades, y la caracterización de las mujeres participantes en la fase de recolección de datos.

4.7.7. Obtención de conclusiones

Respecto a la obtención de las conclusiones del estudio, es necesario resaltar el hecho de que la palabra en sí “conclusión” implica algo que ha finalizado, sin embargo, como resalta Gil et al. (1994), no es necesario que se obtengan al término de la investigación, ya que se comienzan a elaborar ciertas conclusiones o indicios de estas en varios momentos del proceso investigativo, sobre todo durante la obtención de datos y la elaboración del análisis.

Tomando en cuenta lo anterior, debe considerarse que las conclusiones de este proyecto investigativo se elaboraron continuamente a partir del análisis que hizo el equipo investigador respecto a la información obtenida en las entrevistas, con la observación, la categorización de datos, entre otros.

De acuerdo con lo anterior, nos resulta relevante resaltar que, como parte del análisis de información nos parece necesaria la triangulación de la información, la cual se asume convencionalmente que la triangulación es el uso de múltiples métodos en el estudio de un mismo objeto. Arias (2000) expone que es “(...) es conveniente concebir la triangulación envolviendo variedades de datos, investigadores y teoría, así como metodologías.” (párr. 1).

Con lo anterior se identificó la relevancia de utilizar la triangulación desde los sujetos, la teoría y las fuentes, ya que las mismas permitieron darle significado al problema de investigación, así como la construcción de nuevo conocimiento y la comprensión de las experiencias de vida de las mujeres cuidadoras participantes de este estudio.

4.7.8. Validez de la investigación

En este proceso de investigación es necesario garantizar la relevancia, utilidad y validez de la presente investigación, para determinar los alcances y aportes a la problemática social estudiada, por lo que se procuró que, durante todo el proceso, desde la selección del tema y elaboración del diseño, se construyera una rigurosidad científica, esto a partir de asesoramiento y revisiones académicas, uso y revisión de bases de datos oficiales.

Además, parte de esta validez incluyó la aprobación del diseño de investigación por parte del Comité Ético Científico de la Universidad de Costa Rica, la aplicación de consentimientos informados para la obtención de información en el trabajo de campo, asegurar la información obtenida de las entrevistas, entre otros aspectos.

4.7.9. Presentación del informe

En esta fase se obtuvo el documento final de la investigación y la exposición final que detalla lo más posible el proceso investigativo, incluyendo cronogramas, anexos, evidencias, instrumentos utilizados, recomendaciones, conclusiones, así como las

correcciones que nos sean indicadas, para la defensa pública ante el tribunal examinador de la Sede de Occidente.

4.7.10. Devolución de resultados

Como parte de un compromiso con la población de mujeres participantes en la investigación, se vio la necesidad de llevar a cabo, eventualmente, una reunión de tipo presencial explicando los resultados y hallazgos desprendidos de la investigación.

No obstante, debido al reducido tiempo de las participantes de la investigación, esta reunión presencial no pudo ser llevada a cabo, aunque se mantuvo la posibilidad de explicar individualmente los resultados del estudio a cada participante si ellas lo solicitaban.

4.8. Limitaciones y desafíos

Durante el proceso de elaboración de esta investigación, como era de esperarse, existieron diversas situaciones y momentos ajenos al control del equipo de investigadoras y el equipo asesor, lo cual motivó a la creación de alternativas de acción y trabajo en equipo de forma creativa.

Partiendo del proceso de elaboración del diseño de investigación, este representó una relación distante entre los equipos investigadores y la Comisión de Trabajos Finales de Graduación de la Carrera de Trabajo Social, debido a que esta tenía un alto desconocimiento de las propuestas investigativas, provocando una dificultad para la aclaración de etapas del proceso, dudas que surgieron, entrega de los productos académicos, entre otros aspectos.

Todo proyecto de investigación cuenta con una serie de pasos a seguir previamente estipulados para concretar la conclusión del mismo; la redacción de estos pasos es flexible, por lo tanto durante el proceso ideas pueden cambiar, mejorarse y hasta ser omitidas; sin embargo, iniciar indagando el problema a investigar, redactar la justificación, los objetivos, las preguntas de investigación, para luego iniciar la etapa de trabajo de campo provocó, para este estudio investigativo, el descubrir que la problemática principal definida desde un principio no era como tal la problemática real de las mujeres participantes de este estudio, por lo que se tuvo la necesidad de regresar a realizar ajustes a etapas anteriores.

Por otro lado, el proceso de trabajo de campo tuvo sus propias dificultades y obstáculos, empezando por el hecho de que inicialmente se había previsto entrevistar a al menos diez mujeres cuidadoras; sin embargo, al momento de contactar mujeres que tuvieran la posibilidad de ser parte de este proyecto investigativo, una barrera fue el sentimiento de miedo generalizado socialmente hacia la carrera de Trabajo Social.

Es decir, un desafío fue que ellas comprendieran que este proyecto no iba a tener ninguna desventaja o afectación para ellas, ni tampoco implicaba que después de participar iban a ser denunciadas a instituciones o entidades estatales, ante lo cual muchas mujeres consideradas como potenciales participantes se retraían y prefirieron no participar. Aunado a una limitante de tiempo que, en algunas ocasiones los horarios de las mujeres contactadas y los del equipo asesor no coincidían provocando que no pudieran ser parte de esta investigación.

Asimismo, en un inicio se pretendía contactar con mujeres que se dedicaran solamente al trabajo de cuidado, tomando en cuenta que en ocasiones hay mujeres que del todo no pueden dedicar su tiempo a otras actividades aunque tengan colaboración de otros cuidadores, pero ante la falta de posibles voluntarias para la investigación, se decidió ampliar la búsqueda e incluir a mujeres que se desarrollaran en otros espacios además del cuidado, incluidos los que fueran remunerados, aspecto que permitió cumplir con la población meta propuesta en las etapas de diseño.

Además, al darse las entrevistas en diversos espacios geográficos (San Ramón de Alajuela y Barranca de Puntarenas), se tenía planeado inicialmente que en todas las entrevistas se debería contar con la participación completa del equipo de investigadoras.

Sin embargo, debido a la tragedia vial en la ruta conocida como “Cambroneo” en septiembre de 2022, la cual cobró las vidas de varias personas, fue imposible para algunas de las investigadoras, quienes residen en San Ramón, el trasladarse a los espacios de entrevista, por lo que se debió recurrir a medios alternativos para llevar a cabo el proceso, como por ejemplo entrevistas por medio de videollamada o vía mensajes de WhatsApp.

Aunado a lo anterior, otro aspecto que representó un desafío para el equipo investigador, fue el de generar un ambiente de confianza plena y de cero espacios a juicios personales para las mujeres entrevistadas. Para algunas de ellas, el dejar entrar a alguien ajeno a sus hogares representó un reto, aspecto respetable y comprensible, y aunque al finalizar las entrevistas no hubo mayores inconvenientes, algunas de las participantes expresaron sentir temor por las declaraciones realizadas, explicando que les “daba miedo decir algo por lo que se les pudiera denunciar penalmente”.

Ante eso, se reforzó la aclaración del Consentimiento Informado, donde se aclara el derecho a la protección de sus identidades y al derecho de retirarse de la investigación en el momento deseado, sin tener temor por represalias, ya que el motivo central de esta investigación fue el de construir conocimiento.

Por último, se encontró la falta de espacios privados para entrevistar, esto debido a que las mujeres en su mayoría eran cuidadoras principales, lo cual, hizo que durante el proceso de llevar a cabo las entrevistas las personas a su cargo estuvieran cerca de

ellas y limitará las respuestas que podía dar, haciendo también que en ocasiones las personas fueran partícipes de la entrevista. Además, esto también limitó a que se pudieran transportar a un lugar fuera del hogar, ya que debían de continuar ejerciendo el cuidado.

4.9. Cronograma

Tabla 3. Cronograma de actividades

Fases del diseño de la investigación	Ciclos activos				
	I Ciclo 2021	II Ciclo 2021	I Ciclo 2022	II ciclo 2022	I Ciclo 2023
Reflexión y planteamiento del problema					
Fase de elaboración del diseño					
Fase de entrada al campo					
Fase de recolección de datos					
Fase de análisis de datos					
Fase de validez de la investigación					
Fase presentación del informe					

Fase de defensa					
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4.10. Operacionalización de categorías de estudio

Tabla 4. Categorías de estudio

Categoría	Subcategorías	Origen de la información
División sexual del trabajo	Trabajo de cuidado: Distribución del trabajo de reproducción Trabajo no remunerado Trabajo remunerado Economía del cuidado Responsabilidades domésticas Múltiples jornadas de trabajo Explotación de la mujer Consecuencias del recargo de labores Reproducción y cuidado Dinámicas familiares Saturación del trabajo de cuidado.	Observación no participante Entrevista a profundidad
Vida cotidiana	Identidad social Aprendizajes Lenguaje Contexto histórico Costumbres y tradiciones Cultura Ubicación espacio-temporal Experiencias Creencias	Observación no participante Entrevista a profundidad

Condiciones socio materiales de las mujeres cuidadoras	Condiciones sociales, culturales, económicas y políticas: Desigualdad Pobreza Consanguinidad Demandas insatisfechas Falta de oportunidades Dificil acceso a servicios básicos	Observación no participante Entrevista a profundidad
	Servicios básicos precarizados Violación de derechos Poca intervención política Abandono gubernamental Educación	

CAPÍTULO VI

CONCLUSIONES Y RECOMENDACIONES

6.1. Conclusiones

A partir de la elaboración de este estudio, se logra demostrar a través de la voz de mujeres cuidadoras no remuneradas de adultos mayores, que la feminización del trabajo de cuidado es una realidad aún presente y constante en Costa Rica. El analizar aspectos sociales y culturales permitió al equipo investigador el poder afirmar que el tema del trabajo de cuidado siendo una tarea feminizada en la actualidad es multicausal; por lo que, es necesario comprender que no hay una única causa o elemento que la reproduzca de forma única como parte de la sociedad, es así como solo se puede llegar a este fenómeno al analizar diversos aspectos o causas vinculadas en conjunto. Dicho esto, los elementos analizados durante el proceso de investigación no son absolutos, pueden ser diferentes dependiendo del enfoque investigativo que pretenda darse al estudio de esta problemática.

6.1.1. Sobre la División Sexual del Trabajo de cuidado no remunerado

La feminización de la labor del cuidado tiene una base estructural perteneciente a la división sexual del trabajo, la cual establece roles de género, limitando a las mujeres al espacio privado donde ellas deben de asumir labores domésticas, de reproducción y por supuesto de cuidado.

Desde una perspectiva socio histórica y materialista se entiende que la feminización del trabajo de cuidado, es interiorizado por el sistema económico capitalista imperante en la sociedad simultáneamente con la división sexual del trabajo. Debido a que se naturaliza la reproducción de roles y responsabilidades de género que no consideran el trabajo del cuidado como un trabajo, sino como una extensión de las responsabilidades de las mujeres que genera mayor ganancia para el sistema, al no ser remunerado y al mismo tiempo garantizando la reproducción de la fuerza de trabajo que se inserta en el mercado laboral.

La principal justificación para feminizar la labor de cuidado es de carácter biológico, ya que se considera que las mujeres nacen con un instinto maternal, de ternura y amor que les provoca cuidar de manera gratuita a familiares o personas cercanas que así lo necesiten. Por tanto, se les ha hecho creer desde los procesos socialización patriarcal que cuidar es una aspiración de ellas como mujeres y que realizar esta tarea les da valor social.

Estos roles son legitimados por el Estado y reproducidos por instituciones como la iglesia, la escuela, el sector privado, público y las familias, lo que impide desarrollar relaciones sociales igualitarias y/o equitativas entre hombres y mujeres, tanto en el ámbito privado como público.

Según lo anterior, los diversos mecanismos de control de la sociedad, mediante los cuales se trata de moldear un comportamiento específico por parte de los habitantes, establecen razones que “justifican” por qué las mujeres deben de encargarse de las tareas de cuidado y domésticas, ideales aceptados y reconocidos de forma positiva, provocando una naturalización en la población y sobre todo en las mujeres respecto a estas actividades. En este proceso continuo de naturalización, las mujeres encuentran influencia de estos ideales en grupos de iguales, instituciones, medios de comunicación, medios jurídicos, la religión, el Estado, el arte, y muchos otros actores que terminan por reforzar la idea de que el cuidado es tarea de la mujer, basándose constantemente en los roles de género.

Estos roles de género, vistos como mandatos sociales, continúan estando muy presentes en la sociedad actual, incluso cuando los movimientos y luchas por los derechos de las mujeres han presentado avances de gran importancia para la liberación sistemática femenina y la adquisición de derechos en diversos contextos; el generar conciencia e intervención social sobre la importancia de las mujeres que se

dedican a diario a las tareas de cuidado es probablemente de los retos más importantes que persisten en estas luchas, especialmente en una sociedad que se enfrasca, haciendo uso de todos sus medios, en confinar a las mujeres al espacio privado. Para las mujeres, aún en el 2023, el tener un marido, hijos e hijas y dedicarse total y desinteresadamente a ellos, continúa siendo una aspiración para la cual se les cría y se les educa, o bien cuando no cumplen con ello, se les juzga, critica y hasta aísla.

6.1.2. Sobre la mujer como cuidadora no remunerada

Un aspecto a destacar en relación a lo anterior, es que todo lo relacionado al cuidado se vuelve un tema del que poco se educa a las personas, pero que la sociedad considera que las mujeres conocen por naturaleza. Las mujeres que formaron parte de la investigación revelaron haberse encontrado difícilmente preparadas para asumir un proceso como el cuidado, por lo menos en cuanto a conocimientos, por lo que este fue evolucionando en torno a la experiencia adquirida, y a las redes de apoyo primarias y secundarias que se involucraron en sus debidos procesos.

Otro aspecto que puede destacarse es justamente la importancia que las mujeres adjudican a creencias religiosas dentro de un contexto de dedicación al trabajo de cuidado. Muchas de estas mujeres consideran que su fe, su espiritualidad es una herramienta más que les permite sacar adelante la tarea de ser cuidadoras; es decir, consideran la fe un factor protector ante diversas situaciones estresantes que se producen en el proceso del trabajo de cuidado, generando una experiencia con mayor sentido para ellas, aunque no por esto es menos agotadora.

De acuerdo a lo anterior, el tener una creencia religiosa es un derecho para cada persona, y esta no debe ser menospreciada por este hecho, no obstante, resultó de especial interés como la sociedad y los grupos poderosos, se han aprovechado de estas creencias para reproducir ideales sociales, y conductuales, en la población general, así tenga estas creencias o no. El uso de elementos como la moral juega un papel importante en la religión y por ende en las vidas de muchas mujeres, y hombres, que profesan dichas creencias, ya que actividades como el trabajo de cuidado adquieren una dimensión emocional para quienes ejercen esta tarea.

Sin embargo, para las mujeres va mucho más allá de un aspecto emocional, debido a que el trabajo de cuidado es ejercido por ellas como una extensión de su naturaleza, como “una bendición” a la cual supuestamente escogen dedicarse, y esto podría ser considerado una intención muy pura si se olvida mencionar las muchas consecuencias en el núcleo familiar y el desprecio al que se ven sometidas, por la familia y por terceros, cuando no deciden ejercer dicha tarea, por lo que cabría cuestionarse, tanto a nivel individual, cotidiana, así como para futuras investigaciones,

si la sociedad puede continuar manteniendo esta falacia de que el dedicarse al cuidado es siempre voluntario y no tiene aspectos negativos como tal.

Debe ser de especial atención el reflexionar respecto a los entornos donde la persona cuidadora puede ser víctima de violencia de género, ya que es una realidad innegable y que presenta un crecimiento debido a la reciente pandemia por COVID-19, en la cual gran cantidad de mujeres debieron ejercer sus dobles y hasta triples jornadas dentro del entorno privado, aun cuando podían ser víctimas de diversas expresiones de violencia. En este sentido, resultó de particular interés cómo la sociedad hace a un lado el tema de la violencia y espacios sanos para las mujeres cuando esta persona debe ejercer un trabajo de cuidado bajo manipulación emocional y religiosa, situación que no debe ser tolerada y mucho menos invisibilizada.

6.1.3. Sobre la contradicción en el cuidado no remunerado

Por otro lado, desde un contexto rural debe destacarse el hecho de que la dinámica familiar, el cómo se encuentra construida, la forma en que se establecen los vínculos entre quienes conforman el núcleo familiar, repercute indiscutiblemente en cómo las mujeres encargadas del trabajo de cuidado ejercen y reconocen el mismo como tal. En ningún momento se pretendió señalar que existen familias “buenas” o “malas”; sin embargo, resultó interesante descubrir que las mujeres con redes de apoyo familiares estables y presentes tenían una mejor relación con su tarea como mujer cuidadora, así como con los efectos y el desgaste que el cuidado produce, que aquellas con redes de apoyo conflictivas o del todo ausentes, ante lo cual muchas mujeres terminan por apoyarse en redes de apoyo comunitarias o estatales cuando se encuentran disponibles.

Asimismo, se concluye que la inversión estatal en la cuestión del trabajo de cuidado en zonas rurales es escasa en el país. Cada que pasan los años existe un retroceso estatal y lo rural cada vez más carece de intervención acrecentando una problemática que con los años va en aumento por la cantidad de adultos mayores que el país se encuentran y en cuanto a lo familiar tiene como resultado que cada vez más sean a las mujeres que se les asigna esta labor.

De acuerdo con lo anterior, urge que en el país se desarrollen propuestas de intervención que partan justamente de las experiencias de personas que se dedican constantemente al trabajo de cuidado, de modo que estas estrategias sean congruentes con los retos y dificultades que se encuentran en los espacios más concretos e inmediatos de la vida cotidiana, tales como el agotamiento, la falta de acceso a información sobre el cuidado, la expectativa del futuro después del trabajo de cuidado, la salud emocional, los conflictos familiares, por mencionar algunos.

El trabajo de cuidado es una problemática que evidentemente está precarizada, y que cada vez más genera una recarga laboral que es asignada a las mujeres como si fuera

una actividad más en el hogar, cuando verdaderamente, este es un trabajo que conlleva dedicación, tiempo, esfuerzo, dinero y demás, por lo que deben de abrirse espacios de discusión en el cual predomine la equidad de género, una visibilización de las necesidades en los espacios rurales, y no la cultura patriarcal y urbanista que ha dominado durante muchos años.

6.2. Recomendaciones

A raíz de la experiencia obtenida por el proceso de investigación, el cual fue nutrido por las voces de las participantes, permitiendo al equipo investigador ahondar en una problemática tan invisibilizada, y reforzando los aspectos discutidos en las conclusiones, se ponen a disposición un conjunto de recomendaciones que pretenden inspirar y guiar a futuros investigadores e investigadoras, aportes a la carrera de Trabajo Social y actores comunitarios, entre otros.

6.2.1. A Gobiernos locales y otros actores comunitarios

- Facilitar espacios de capacitación instruidos por profesionales en Enfermería, Psicología y Trabajo Social para las personas cuidadoras de adultos mayores, donde se tome en cuenta los diferentes tipos de casos que existen con respecto al cuidado, con el fin de brindar herramientas y técnicas útiles para realizar el trabajo de cuidado, debido a que la gran mayoría experimentan desinformación.
- Se recomienda realizar gestiones institucionales y políticas para la creación de plazas de profesionales en materia de cuidado, especialmente para profesionales en Psicología y Trabajo Social, dentro de los servicios de salud y entidades locales como la Municipalidad.
- Concientizar sobre la feminización del trabajo de cuidado, ya que es un fenómeno social invisibilizado socialmente, pero que interpela a la mayoría de familias del país por lo que debe de ser abordado estatalmente para brindar herramientas para llevar a cabo una labor tan grande como lo es cuidar.
- Priorizar las necesidades de las mujeres cuidadoras en zonas rurales en las políticas sociales a nivel país, y no solo desde gobiernos locales.

6.2.2. Futuros procesos de investigación

- A partir de las experiencias como investigadoras, se insta a la población estudiantil a investigar acerca de las particularidades de las zonas rurales y a desarrollar proyectos que vivencien la cotidianidad que en ella nace, con el fin de

facilitar la construcción de conocimientos en un campo poco investigado en la disciplina de trabajo social.

- Estudiar cómo la política social está segmentada y no evidencia las necesidades e intereses de las mujeres rurales y las particularidades que ellas viven de forma solitaria.
- Se recomienda prestar atención y construir propuestas investigativas que abarquen el tema de la violencia de género dentro de dinámicas de trabajo de cuidado, debido a que fue una realidad emergente durante el proceso que sin lugar a dudas merece múltiples esfuerzos de investigación.
- Facilitar procesos socioeducativos con mujeres cuidadoras, mediante la construcción de redes de apoyo, de conocimiento, acompañamiento y comunicación oportuna para que se sientan seguras de compartir sus experiencias y solidarizarse con mujeres que viven realidades similares, ya la gran mayoría de que experimentan falta de apoyo. Este tipo de red de apoyo puede ser guiada por estudiantes de niveles avanzados de las carreras de Trabajo Social y Psicología que estén en proceso de realizar sus prácticas profesionales.
- Estudiar la cotidianidad rural, las necesidades, intereses y las representaciones sociales que existen en los procesos de socialización, con la finalidad de comprender que en lo rural también surge conocimiento.

6.2.3. A la formación en Trabajo Social, en la Sede de Occidente

- Incentivar a las y los estudiantes de la carrera, en especial a aquellos afines a la lucha social y feminista, a ahondar en problemáticas y fenómenos sociales naturalizados y poco explorados en la actualidad ya que, si bien el movimiento feminista ha avanzado a grandes pasos y con múltiples temáticas, el trabajo de cuidado ha quedado rezagado en investigaciones actuales.
- Reforzar durante tercer año de la carrera el acercamiento que tienen las y los estudiantes a las comunidades, durante y posterior a la práctica profesional de dicho año, debido a que los temas de investigación que pueden surgir en estos espacios pueden enriquecer la formación profesional y además permiten crear futuras formas de intervención basadas en necesidades latentes de las

comunidades, como ocurrió con la construcción del presente proyecto de la investigación.

- A las y los profesores que integran los equipos de asesoría para las y los estudiantes en proceso de investigación, se les insta, de la manera más respetuosa, a hacer lo posible por buscar un balance entre la cantidad de Trabajos Finales de Graduación que asumen para revisión o dirección, ya que la saturación laboral les perjudica también a las y los estudiantes, quienes trabajan en muchas ocasiones con escasa o nula supervisión durante el proceso.

6.2.4. A las mujeres dedicadas al trabajo de cuidado no remunerado

- Construir redes a nivel comunitario, cuando las familiares no existen o son inestables, con el objetivo de generar acuerpamiento para la mujer cuidadora y para otras que se encuentran en la misma condición de cuidadoras no remuneradas.
- Consultar a instituciones o entidades sobre procesos de formación en torno al trabajo de cuidado, tomando en consideración que muchas mujeres asumen estos procesos sin experiencia o con conocimiento muy escaso, generando dudas, impotencia y miedo. Debe recordarse que aunque la sociedad considera el trabajo de cuidado como algo nato para las mujeres, no necesariamente es la realidad, por lo que la búsqueda de espacios de formación es válida y necesaria.
- Acercarse a las instituciones pertinentes cuando el consenso familiar relacionado a quién y cómo deberá asumir las responsabilidades del trabajo de cuidado, se torne conflictivo o no exista. Esto considerando que muchas mujeres, incluidas varias participantes, presentan sobrecarga de labores debido a que son las únicas en asumir dicha responsabilidad, aunque existan más familiares capaces de colaborar. Dicha recomendación se realiza de forma consciente respecto de los derechos de la persona cuidadora y también de la persona sujeta de cuidado.

