

Restricted freedoms of menstruating women: a capability approach to period poverty

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Abstract

Period poverty can generally be defined as a lack of access to or an inability to acquire, access, and perform menstrual health products, facilities, and practices. It is estimated that around 500 million women worldwide live in period poverty. This is a phenomenon which can incapacitate women from performing basic functions and from participating fully in society. In this paper, I will use the Capability Approach developed by Martha Nussbaum and Amartya Sen to show conclusively that period poverty poses a real restriction to the freedoms of menstruating women and girls. Under the Capability Approach, well-being is measured by the real ability of an individual to have certain capabilities. Specifically, period poverty restricts freedoms by having an adverse effect on education, health, and social functioning. While many of these women and girls have the formal abilities or rights to the restricted spheres, period poverty acts as a hidden barrier to successfully acquiring the capabilities of being educated, being healthy, and being social.

About the author

Hanrié Viljoen will complete her Honours in Philosophy in 2024 and plans to commence her Master's in Philosophy in 2025. Her research is in Political Philosophy and specifically on theories of political emotions. She is interested in what the role of these emotions could be for societies striving towards justice as well as their effects on real political issues such as inequality. Besides philosophy, she enjoys anything creative or in the arts.

1. Introduction

In 1979, the economist and philosopher Amartya Sen delivered a pivotal lecture at Stanford University that changed the way that we look at distribution and well-being throughout the world and specifically in developing countries. In this lecture, and in what later became a substantial body of work on the topic, Sen criticises resource-based or “means-based” measures of justice, specifically Gross Domestic Product, and argues that we should instead focus on the ends of justice (Saito, 2003:18). What emerges from his work and from the work of his colleague, Martha Nussbaum, is known as the Capability Approach (CA).

In this paper, I consider the theory of capabilities and functionings as it applies to menstruating girls and women living in period poverty. In the first section, I will introduce the CA as it has been theorised by Sen and Nussbaum, while also looking at a few critiques. In the second section, I will conceptualise period poverty and introduce the problem of restricting women’s freedoms within the CA.¹ In the final section, I will argue that period poverty limits the capabilities of girls and women through three specific channels namely education, health, and social exclusion. For this section I will draw on case studies from different countries and societies and focus on the specific functionings that are restricted due to period poverty. I will conclude that the persistence of period poverty (its effects and its cyclical nature) impairs girls and women’s performance of certain functions, thereby restricting their freedoms, and thus must be completely eradicated to improve the quality of life of girls and women across the world.

2. The capability approach

The first important factor to keep in mind about the CA as established by Sen, is that it is not a fully-fledged “theory” of a particular kind, but rather a general framework. Scholars may use the CA as a framework

to develop specific capabilitarian theories of justice, distribution, or welfare. This is opposed to “thicker” theories of justice which propose specific principles of justice, such as Rawls’s Justice as Fairness. In this paper, I refer to the CA as a framework for how to think about the injustice of period poverty and the well-being of menstruating women and girls. Although this approach offers no specific principles of justice, its uniqueness and significance are derived from the metric of justice that it uses. This metric is capabilities (Robeyns, 2018:4). In what follows, I explore the framework of the CA, its metric of capabilities, and how this is used to reason about justice.

One of the main motivations for the development of the CA is to offer an alternative account to the dominant economic measurements of well-being in societies. Economic metrics, such as Gross Domestic Product (GDP), do not give an accurate representation of an individual’s current standard of living. These metrics are focused on the means rather than the ends of human well-being. While income and wealth are one of the means by which humans may achieve well-being, it does not give us the full story. The CA aims to address the shortcomings of these economic metrics of well-being (Sen, 2009:226).

In *the Idea of Justice* (2009), Sen explains that no resource-based (e.g. utility, income) measure of justice will give us an accurate representation of the quality of life of the members of a particular society. We value resources, not in themselves but rather because of what they are able to do for us/give us. For example, income may enhance our well-being because we will be able to pay for medical care, buy better quality food, or buy a plane ticket. However, we want medical care and food, not to stockpile it in our homes, but to improve our lives. We want to acquire medical care, so that we can *be healthy*, we want food, so we will *be well-nourished*, and a plane ticket, so that we can travel, visit family, experience different cultures, or go on

¹ While I am aware that many men and non-binary persons can also experience period poverty, this paper will be focused on the experience of menstruating girls and women.

holiday. Thus, to only measure the amount (or average amount) of resources distributed in a society misses the point of what these resources are for – and ultimately, what justice is for in the first place (Sen, 2009:225-227). The reframing of the question of justice is Sen's most important contribution to political philosophy and development economics.

People value things such as being healthy, being well-nourished, travelling, and spending time with their family. In the framework of the CA, the valuable ways of being and the valuable things we can do are called functionings (ibid.:233). If we have the real means of achieving these valuable functionings, then we have capabilities. In other words, one has the capability of being well-fed when you have the real opportunity to achieve this functioning. Broadly, then, the CA want people to have more capabilities, rather than less. We want people to be and do more of the things that they value. While this is important, especially for more basic functionings (such as being well-fed, or being healthy, for example), it is also important that people are free to choose which functionings they *do* value, as this consideration will be diverse in pluralist societies (ibid.).

At this point, we can begin to discuss the importance of freedom for the CA and for its conception of justice. People have reasons to value certain lives: they value lives that go well. Lives that go well will have certain features that may be common to many people. As I have mentioned, most people will value being healthy or being well-fed, and so it is important that they be able to achieve those functionings. However, people will also value unique and quirky functionings that others may not. A person who is healthy and well-fed but works a stifling corporate job while dreaming of becoming a trained opera singer, should be able to pivot meaningfully towards achieving the valued functioning of being an opera-singer instead of being a corporate employee. A society in which people are not able to strive towards achieving valued functionings – where they are not able to expand their capability set – is not a truly free society.

In Nussbaum and Sen's highly influential book, *The Quality of Life* (1993), Sen writes that “people may, however, differ a good deal from each other in the weights they attach to these different functionings – valuable as they may all be – and the assessment of individual and social advantages must be alive to these variations” (1993:31). The sets of capabilities achievable in society thus forms the informational basis for assessing the well-being, and indeed the freedom, of society (ibid.:30). Focusing on the formal rights and liberties that a society has such as those codified in their nation's constitution is not enough to accurately measure freedom and well-being. Many countries, including South Africa, afford citizens certain constitutional rights, such as the right to education, but in reality, many people do not have the real opportunity to achieve this functioning. Thus, capabilities as the measure of well-being allow us to see where people do, or do not, have the real opportunity to achieve certain capabilities and whether there may be certain barriers to achieving them.

Period poverty is one such severe barrier to the achieving of capabilities for menstruating women and girls. Specifically, it bars them from attaining the capabilities of being educated, being healthy, and being socially integrated, as I will argue in the final and main section of this paper. First, however, we must look at some of the critiques to the CA and how the supplementary work of Martha Nussbaum has aided in overcoming these critiques.

One of the critiques levelled against Sen's framework by philosophers such as Thomas Pogge, is that it is too broad or vague, and it does not define the specific capabilities that would positively contribute to a person's development (Brighouse & Robeyns, 2010:82). A level of specificity could be useful to operationalise this approach towards social injustices such as poverty or homelessness. Sen does not propose a “specific formula for policy decisions” but rather a “general approach focussing on information on individual

advantages, judged in terms of opportunity” (Sen, 2009:232).

The question then, is, what are the valuable capabilities, and how should this be decided? Martha Nussbaum expands upon Sen’s original work and comes up with a basic set of capabilities that she believes will exemplify a good life. This basic list is based on an objective measure of well-being.

Nussbaum’s application of the CA highlights the universalistic and objective nature of justice. According to Nussbaum, it is completely possible to recognise the human form of life and human beings across different time periods and in all parts of the world, regardless of specific cultural or societal norms of appearance or behaviour. She makes an argument for essentialism which she defines as “the view that human life has certain central defining features” (Nussbaum, 1992:205). Thus, justice and freedom should also be measured on an objective standard and cannot, and should not, have different definitions or applications in different societies. Some of the capabilities that she adds to her list of basic capabilities include bodily health, bodily integrity, emotion, and practical reason (Robeyns, 2018:13). There are certain objective standards as to the basic well-being of a human life that can be extremely useful in our attempts to eradicate global issues such as hunger, poverty, and period poverty.

This essentialist view has been criticised for paternalism, prescriptivism, and a reliance on metaphysical realism. Nussbaum’s critics claim that we cannot have objective knowledge of what the needs of different communities are because these are subjectively determined and will differ across different societies. While Nussbaum acknowledges the potential dangers and history of metaphysical realism, she contends that to give up the search for our common humanity would be giving up too much. It is true that people in different communities will have different needs and different reasons to value different ways of life. However, if we abstract from the whole course of human history across the world we can still

find “a more or less determinate account of the human being, one that divides its essential from its accidental properties” (Nussbaum, 1992:207). Due to space limitations, it will suffice to say that Nussbaum is not arguing for an imperialist essentialism, rather an Aristotelian or internalist essentialism which recognises the basic form of human existence and the basic capabilities that would constitute a recognisable human life. A human life that does not meet the basic list of capabilities, as provided by Nussbaum, is said to be seriously deprived. A life that exceeds this list is a life of human flourishing which is the life we want all humans to be able to reach regardless of their position in time or location.

3. Period poverty and its detrimental effects on women and girls

Period poverty can generally be defined as a lack of access to or an inability to acquire, access, and perform menstrual health products, facilities, and practices. The definition rests on two parts, namely, (1) the inaccessibility or unaffordability of menstrual products by girls or women in poor communities and, (2) the lack of education or information around the use of products and proper menstrual hygiene practices (Sommer, 2021:1). I would like to add to this definition (3) the cyclical and entrenching nature of period poverty, as it keeps girls and women out of productive spheres of society and the economy, which reinforces structural poverty.

The literature and research on period poverty is scant and the topic has only recently garnered the attention of researchers and policy makers. Despite this, the research still indicates a deep-rooted problem in societies across the world. It is estimated that 500 million women globally are unable to access sufficient menstrual health management products and facilities (Michel, Mettler, Schöenberg & Gunz, 2022:1). While menstruation is a normal biological process that occurs in fertile women, there is a significant amount of social stigma attached to it which causes a delay in action to the problem of period poverty (Somroo,

Sarwar, Balouch, Maryam, Ghafoor & Bibi, 2023:549). This stigmatisation of the topic carries over into the policy sphere which causes a delayed response to an urgent issue. (Casola, Luber, Riley & Medle., 2022:374).

The three main areas in which this plays out is in education, health, and the social networks of communities. Through the lens of the Capability Approach, period poverty acts as a barrier to the real pursuit of certain capabilities, specifically education, health, and being socially integrated. The following sections of the paper will explore these three areas in light of the CA by using various case studies.

3.1. The effects of period poverty on education among adolescent girls

For Sen, education has both intrinsic and instrumental values. Through education you can broaden your capabilities and influence your opportunities to accumulate capital that may later broaden your capability set even further (Saito, 2003:25). Period poverty has a detrimental effect on the education of adolescent schoolgirls, which can have a lasting impact throughout their lives and deter them from achieving higher levels of capability. There is a significant difference in the persistence of period poverty between educated and uneducated women, and there is a positive correlation between levels of education among women and their menstrual hygiene management practices later in life (Roussouw & Ross, 2021:9). Thus, not only does period poverty directly affect the level of education that girls can achieve, but the level of education achieved directly affects the continuation of period poverty in the lives of women.

Many girls living in poverty miss school days while they are menstruating because they are unable to afford the necessary menstrual products to manage their hygiene and comfort during the school day. While it is possible to still go to school without the use of these products – assuming the girl does not suffer from debilitating menstrual cramps or other menstruation related health complications – the fear and embarrassment that comes with leakages of

menstrual blood, as well as its odour, deter girls from even attempting (Michel *et al.*, 2022:2). It is certainly the case that most people, and probably all menstruating women, will agree that it would be highly uncomfortable to attend school or university classes while menstruating without any protection. There are various case studies to support this claim. A 2017 study in Uganda found a positive correlation between the distribution of reusable pads and a reduction in school absenteeism. Qualitative research from a sample of 595 girls in Ethiopia found that 58% of the girls admitted to a worsening of their academic performance since they started menstruating (Oduro & Domfe, 2020:27). However, there are other factors above the provision of menstrual products that deter menstruating girls from attending school.

In 2020, the Ghanaian government instructed a research team to perform a cost-benefit analysis over three years for the free distribution of menstrual products to girls in junior high school. The sample included 30 713 girls between the ages of 15 to 17. Out of the sample almost 7000 of the girls were chronically absent from school due to menstruating, but not necessarily specifically due to the lack of products. Girls face ridicule and embarrassment from classmates while menstruating and have insufficient access to hygienic and safe spaces to properly attend to their menstrual health needs. This includes things such as clean and lockable bathrooms, running water, soap, and bins to dispose of their menstrual products in a hygienic way (Roussouw & Ross, 2021:6-10). These girls have a much higher risk of dropping out and, in Ghana, they are at risk of becoming child brides and becoming pregnant at a very young age (Oduro & Domfe, 2020:31). It is clear to see how these girls' freedom in choosing a valuable life is severely restricted.

Education during adolescent years is crucial for the positive development of children. Not only are these girls missing key formative academic content, but they miss an important part of the childhood experience, which is attending school, making friends, playing,

and learning important life lessons. Due to the high rate of school dropouts caused by chronic absenteeism, many of these girls will not complete secondary education. As mentioned, there are inherent capabilities that are lost when a child misses out on schooling, but it also leads to a decrease in potential future income for these girls.

There have been critiques against the applicability of the CA for children. Sen has a very succinct answer to this critique which is that since children are not yet mature enough to make decisions for themselves the concern should not be the freedoms that a child has now but the freedoms they could have in the future (Saito, 2003:25-27). Missed opportunities due to school absenteeism diminishes the freedoms that girls will have in the future based on factors completely out of their control and sometimes even out of their parents' or caretakers' control.

3.2. The effects of period poverty on women's health

Period poverty can have adverse effects on the physical and mental health of girls and women. Since women living in period poverty cannot access the necessary menstrual products during menstruation they often have to rely on subpar materials. Many women re-use absorbent cloths, rags, menstrual pads, or tampons which carry the risk of infections or even Toxic-Shock Syndrome which is a potentially fatal condition. Multiple studies have found a correlation between period poverty and the prevalence of reproductive health risks such as urinary tract infections and pubic rashes (Somroo *et al.*, 2023:552).

This problem is exacerbated by the fact that women living in period poverty often do not have access to safe and hygienic spaces to manage their menstrual needs. An extensive study from 2021 done in eight low- and middle-income countries delivers staggering statistics about the reality of hygiene and menstrual health for women living in these countries. In Ethiopia, more than half of the women do not have access to clean spaces in which to manage their

menstrual health. In seven out of the eight countries, it is found that these spaces do not have soap and/ or running water, with the highest percentage reported (again) being in Ethiopia at 84% (Rossouw & Ross, 2021:6). Not being able to clean off blood leakages from your genitals, surrounding skin or from your clothing poses a major risk for bacterial growth and infection. Another interesting part of the study is the finding that most of the women reported that the spaces that are available for menstrual health management are not safe and often they are unable to lock the doors. This brings up an additional concern of safety since these are often the countries with a higher prevalence of Gender Based Violence (Ross & Rossouw, 2021:10). I think this is an important point to consider and brings up concerns about the extra burden on these women's mental health.

It is common for many women to have to "improvise" for a short while during menstruation. This can happen when a woman begins to menstruate unexpectedly, perhaps while she is out in public, and she does not have the products she needs on hand. However, for the women living in poverty they find themselves having to improvise every day of their period for each menstrual cycle (Somroo *et al.*, 2023:551). Having to be constantly vigilant and aware of this can take up a lot of mental energy and capacity even for women who have all their basic needs met, but to add this onto the mental load of women already faced with scarcity on all levels of living is extreme. It certainly has detrimental effects on their mental well-being. Another important factor to consider is that given the frequent loss of education due to period poverty and the subsequent reduction of future income, women will most likely be less able to afford medical care as adults.

Being healthy and having the freedom to choose how to manage your health is essential to the consideration of your quality of life. For this reason, it is also one of the basic capabilities included in Nussbaum's list. It is a tragedy for young women to be made prisoners of their own biology because they do not have the means

to free themselves. To be clear, these women are more than just victims of their circumstances and it may be the case that they have sophisticated cultural practices surrounding menstruation. However, it would be an even greater tragedy, and a failure of our humanity, not to bring attention to the cases that are indeed restrictive and not to ask the question: do these women have the freedom to choose?

3.3. The effect of period poverty on the social functioning of girls and women

The social stigma surrounding menstruation is deep-rooted in most societies around the world. Some communities have harsher social norms around the topic than others, but in general, it is still seen as a taboo subject that should only be discussed among women and only when needed. Period poverty is a global issue and affects women in some of the world's wealthiest countries as well. A study done in low-income communities in the United States of America found that more than 60% of the women in their sample were unable to afford traditional menstrual health products and, similar to the women in low-income countries, resorted to discarded items that could be used as absorbents (Sommer & Mason, 2021:1).

A very serious social concern of period poverty is the fate of homeless women with little support systems. Women living in these conditions not only lack the means to buy the necessary products, but also are unlikely to have access to bathrooms or laundry facilities in which to manage their menstrual health properly and hygienically. These women face embarrassment and social exclusion daily, and one can see how it would be difficult to re-integrate into social life with these types of barriers. Even in massive metropolitan cities, such as New York City, the social infrastructure, policies, and funding is inadequate to deal with this problem and help women escape a cycle of social exclusion and avoidance (Sommer & Mason, 2021:1). The lack of attention to addressing these basic needs for women prevents them from living dignified lives with confidence and without the fear of ridicule.

If you were to put yourself in the shoes of a woman living in this type of deprivation you would not consider her to be living a free life. To illustrate, imagine that you are a homeless woman living in a major city today where the cost of living is sky rocketing. Let's say you manage to apply for a job, and you are invited for an interview. Being offered this job would significantly improve your quality of life because you will be able to reach more capabilities than before. However, on your way to the interview you get your period and there is now a blood stain on your only pair of decent slacks. Without having the money to buy pads or tampons and without access to a restroom, most women would choose to not go to the interview due to the social stigma. I do not believe any person would want to go to a job interview with an odorous stain on their clothing. Even if you did manage to "make a plan" (to get new clothes and some products), this will take some time and manoeuvring in which case you might end up missing your interview altogether. This may sound like a trivial example, and one may think there are surely other arrangements that could be made, or one could try to explain the situation to the interviewer, but that would miss the point that women often must take on a very large added responsibility when managing their menstruation that should not have any effect on their social functionings.

This issue is also linked to the effects of period poverty on education. As mentioned, part of the value of attaining an education is not simply the content of the syllabus but also the valuable social skills one learns: skills learnt from being together with peers, and experiencing similar troubles and joys, for example, during puberty; making friends and playing; forming relationships through extracurricular activities; and building a network of relations that could support you socially for the rest of your life and career. It is thus important for researchers to be asking questions about how period poverty impacts the social exclusion or integration of women at various points in their lives.

4. Conclusion

In this paper I have shown how the effects of period poverty limit the freedoms of girls and women across the world by placing barriers to them achieving higher capabilities. Period poverty severely affects the schooling and further education of young girls which directly reduces the inherent capabilities of education, but also the future capabilities gained from an increased income and greater career opportunities.

The miseducation and lack of access to menstrual health management products and spaces for girls living in poor communities can lead to adverse consequences for their physical and mental health. Lastly, the social integration of women living in period poverty is disrupted due to harsh social stigma and a constant mental battle. We can thus only conclude that for women to be free to choose the lives they have reasons to value, period poverty must be eradicated.

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