

Edited by Vincenzo Fortunato,
Pedro López-Roldán, Sandra Fachelli

Public Policies and Social Inequalities in Transformation

Comparative Insights from Europe
and Latin America



INCASI *International Network for
Comparative Analysis of Social Inequalities*



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Isbn: 9788835181033

Isbn e-book Open Access: 9788835189213

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Fachelli*

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Public Policies and Social Inequalities in Transformation: Comparative Insights from Europe and Latin America

by *Vincenzo Fortunato, Pedro López-Roldán, Sandra Fachelli*

1. Presentation

This book collects some of the most relevant contributions that have emerged from research and study activities carried out by scholars and experts within the International Network for Comparative Analysis of Social Inequalities (INCASI), recently presented and discussed in a conference titled “Public Policies, Reforms and Innovation in Europe and Latin America”, held at the University of Calabria (Italy) from 22 to 23 May 2025.

In the call for papers, contributors were explicitly asked to consider a context marked by the structural transformations of capitalism, the crisis of traditional welfare systems, and the inability of nation-states to adequately respond to emerging social and economic challenges. Demographic shifts reshaping the composition of the workforce, together with fiscal constraints and governance difficulties, exposed the limits of existing institutional frameworks. Within this analytical frame, the initiative sought to deepen theoretical and empirical understanding through a comparative and transnational perspective, exploring both European and Latin American experiences. The underlying goal was to examine how individuals, collective strategies, and public policies interact in constructing new pathways for economic, social, and civic progress.

By inviting authors to situate their analyses within this shared context, the call fostered a multidimensional and interdisciplinary dialogue on the reconfiguration of capitalism, welfare systems, and social models. Quantitative and qualitative contributions were equally welcomed, including single-country studies, regional analyses, and comparative perspectives. Particular emphasis was placed on understanding the role of public and private actors in managing processes of transformation, integration, and adaptation, in line with INCASI’s Multi-Actor Approach.

The selection of papers was carried out by a Scientific Committee

composed of scholars from both sides of the Atlantic: Emmanuelle Barozet (University of Chile), Patricia Sorribas (Universidad Nacional de Córdoba), Olga Salido (Universidad Complutense de Madrid), and Eduardo Chávez Molina (University of Buenos Aires). Coordination of the conference was undertaken by an Institutional Committee: Vincenzo Fortunato (Università della Calabria), Pedro López-Roldán (Universitat Autònoma de Barcelona), and Sandra Fachelli (Universidad Pablo de Olavide).

This collective volume brings together contributions that originate from the comparative and interdisciplinary research developed within the INCASI Network. The project has fostered collaboration between European and Latin American scholars to understand how inequalities are produced, reproduced, and potentially reduced through the design and implementation of public policies. The central aim is to explore the role of public policies in addressing inequality across economic, social, and territorial dimensions — treating policies not as isolated tools but as institutional configurations that mediate between markets, social actors, and political power. By combining macro-institutional analyses with empirical case studies, the chapters provide a cross-sectional view of how welfare and labor regimes adapt — or fail to adapt — to global challenges.

2. Structure of the book

The volume is divided into four interrelated thematic parts, each addressing a key dimension of the relationship between public policies and inequality. Together, they offer a multidimensional portrait of the transformation of welfare and the reconfiguration of state action in a globalized context.

2.1. Part I. Reconfiguring the State: Welfare Institutions and Policy Transformations

This part has five chapters. The first, *Bringing Back the State. The Role of Public Policies to Reduce Inequalities Across European and Latin American Countries* by Vincenzo Fortunato, Pedro López Roldán and Sandra Fachelli, examines the State's renewed role in reducing inequalities across Europe and Latin America, focusing on the comparative evolution of welfare institutions. It analyzes how responses to globalization, fiscal pressures, and demographic change have reshaped redistributive mechanisms and recast state-society relations. Drawing on the INCASI framework, it identifies

convergences in policy innovation and divergences rooted in institutional legacies. The analysis underscores the continuing relevance of state intervention while probing the limits imposed by neoliberal paradigms. The second chapter, *Social Order and Socioeconomic Institutions: New or Old Trends?* by Antonio Martín Artiles, analyses the evolution of predistributive and post-distributive institutions after the Great Recession and the COVID-19 pandemic. It revisits the erosion of the Keynesian-Fordist social pact and the emergence of new forms of institutional complementarity. Classifying coordinated, mixed, liberal, and dual models, it highlights divergent capacities to sustain solidarity and equality, the crisis of predistributive mechanisms, and the rise of the ‘Active Social State’. The third chapter, *Assessing the Role of Welfare States in Reducing Inequality: Evidence from EU15 Countries in the Face of Recent Global Crises (2008–2023)* by Olga Salido, uses harmonised EU-SILC data, to compare redistributive effectiveness during the Great Recession and COVID-19. While both crises raised market inequality, welfare institutions stabilised outcomes unevenly across regimes. Pandemic-era policies marked a shift from austerity to expansionary interventions, yet structural divides persisted. The chapter calls for stronger predistributive policies and institutional resilience. The fourth chapter, *Measuring Poverty Across Contexts: A Comparative Policy Lens* by Emmanuelle Barozet, explores methodological and policy challenges in measuring poverty across regions. It shows how measurement frameworks reflect institutional choices and shape agendas. Focusing on Europe and Latin America, it argues for contextualised comparative approaches that link quantitative indicators to qualitative dimensions, demonstrating that measurement is itself a political act. The last chapter, *The institutional production of inequality. Non-compliance and extractive institutions in local service provision* by Vicente Espinoza, discusses the complexities of building inclusive institutions, considering the case of non-compliance among street level bureaucrats at the local level. The chapter examines how a distinct extractive institution, i.e. patron-client relationships, shapes the interaction between functionaries and users.

2.2. Part II. Labour, Wages, and Regulation: Old Challenges, New Risks

This part has four chapters. The first, *The Minimum Wage as a Political Impetus in the Face of Distributive Inequality Processes* by Eduardo Chávez Molina, analyses the distributive and political role of minimum wages as predistributive tools intersecting with collective bargaining, employment structures, and fiscal strategies. Comparing Europe and Latin America, it

argues that minimum wages are moral-political devices essential to maintaining income floors and reducing in-work poverty. The second chapter, *Artificial Intelligence and Labor Regulation. Ranking the Risks* by Victoria Matozo and Pablo Molina Derteano, investigates AI's impact on work and the regulatory challenges it poses — algorithmic control, data asymmetry, and the erosion of collective bargaining. Comparing Europe and Latin America, it proposes a risk typology and argues for adaptive labor laws that integrate ethics, transparency, and democratic governance. The third chapter, *Neither Too Much nor Too Little. Advances in the Measurement of Digital Platform Work in Latin America and Europe* by Patricia Sorribas and María Celeste Gómez, maps advances in the official measurement of platform work. The chapter shows regional asymmetries: Europe has moved toward harmonised data collection, while Latin America remains fragmented. It underscores the importance of statistical visibility for regulation and fair digital transitions, offering proposals for standardisation. The last chapter, *Promoting Eco-Social Policies and Just Transition: Trade Unions' Strategies. Evidence from Italy, the Netherlands and Argentina* by Luca Novelli and Renata Semenza, compares how unions both in Europe and Latin America articulate eco-social strategies within 'just transition' agendas. Effective outcomes depend on strong tripartite dialogue and policy coherence. Unions can help redefine growth models to ensure that ecological transitions do not exacerbate inequalities.

2.3. Part III. Care, Welfare and Social Rights: Policies and Everyday Inequalities

The third part of the book has five chapters. The first, *Welfare and Care Policies in Latin America: Theoretical and Methodological Discussions and Persistent Challenges for Comparative Analysis* by Leticia Muñiz Terra, María Eugenia Roberti and Matías Iucci, reviews debates on welfare and care regimes in Latin America, marked by familialism, informality, and limited state capacity. It proposes a multidimensional approach that treats care as labor and social rights, linking policy reform to democratic participation. The second chapter, *The Social Reorganization of Care in Pandemic Times: Public Policies, Gender Inequalities, and Community Strategies in the Spanish State* by Màrius Domínguez-Amorós, Carme Vivancos-Sánchez and Elisabet Almeda Samaranch, shows how the pandemic exposed and intensified gendered inequalities in care in Spain. It analyses state interventions and community networks that sustained daily life, arguing for recognition and support of community-based care infrastructures. The third chapter, *Inequalities and*

Early Childhood Education and Care (ECEC) Policies for Children Aged 0–3 in Spain and Chile: Governance, Availability, Accessibility and Affordability by Blanca Barco and Manuel Río, comparing Spain and Chile, links ECEC provision to welfare logics and implications for gender equality and social mobility. It identifies access gaps and territorial disparities, calling for sustained public investment and cross-sectoral coordination. The fourth chapter, *Care, Childhood, Adolescence and ICTs: A Qualitative Study in the Cities of La Plata and Córdoba (Argentina)* by Ileana Desirée Ibáñez, Juliana Huergo and María Eugenia Rausky, based on qualitative research, explores how ICTs mediate care, education, and socialization in Argentina. It highlights ICTs' dual role as tools for inclusion and vectors of inequality, calling for digital rights within broader social protection strategies. The fifth chapter, *Undocumented Migrants' Access to Social Rights in a Dismantling Welfare State* by Anitta Kynsilehto, focusing on Europe, shows how welfare retrenchment and restrictive migration policies stratify access to social rights. It argues that inclusive protection for all residents is essential to uphold universalist welfare principles.

2.4. Part IV. Social Stratification, Inequality Pathways and Local Policy Challenges

The fourth part of the book has five chapters. The first chapter, *Persistent Inequality or Increasing Class Barriers? The Pattern of Intergenerational Class Mobility in Argentina in Historical Perspective* by Pablo Dalle and Sandra Fachelli, combining historical and quantitative approaches, shows that despite limited educational expansion and economic restructuring, mobility remains limited due to structural stagnation, unequal education, and recurrent crises. It concludes that greater mobility demands redistributive and educational policies to reduce persistent inequality. The second chapter, *Transitions from Secondary to Higher Education in Argentina. Social Inequality Guidelines for Regional Education Policy Formulation* by Paula Boniolo and Sebastian Lemos, examines the transition from secondary to higher education in Argentina, revealing persistent inequalities despite expanded access since 2006. Using national data, it finds class background and parental education as key barriers and calls for inclusive, equitable, and quality-oriented higher education policies. The third chapter, *Social Protection Dynamics and Public Policies Aimed at Youth: Toward an Assessment of the Last Decade in Argentina* by Emilio Ayo, Tatiana Jack, Guadalupe Lopez and Lucía Ibarra Ruoredda, analyzes recent transformations in Argentina's social protection system (2015–2025), marked by advances, setbacks, and

worsening living conditions. Focusing on programs as Progresar and Envión, it shows how youth policies reproduce and challenge inequalities, reflecting political and cultural disputes over welfare and protection. The fourth chapter, *Sugar-Sweetened Beverage Consumption in Urban Areas of Argentina: A Public Health Problem and an Intermediary Determinant of Health Inequalities* by Matías Ballesteros, Betina Freidin and Josefina Roques, linking dietary patterns to socioeconomic stratification and health outcomes, advocates comprehensive public-health policies — regulation, education, and fiscal measures — to reduce nutritional inequality and promote health equity. The last chapter, *A journey through the plots of a social policy* by Nadia Rizzo, traces the chapter through qualitative and institutional analysis how design, bureaucracy, and local actors interact in a social policy's life cycle, revealing contradictions between intentions and outcomes.

Part I
Reconfiguring the State:
Welfare Institutions and Policy Transformations

1. Bringing back the State. The role of public policies to reduce inequalities across European and Latin American countries

by *Vincenzo Fortunato, Pedro López-Roldán, Sandra Fachelli*

1. Introduction of this book¹

In an era characterized worldwide by great uncertainty and deep economic and social transformations, States as well as national and international institutions are called to give effective answers in terms of policies to cope with crises that seem to follow each other at ever closer intervals. This book aims to contribute to the international debate through the comparative analysis of inequalities (López-Roldán and Fachelli, 2021; Fortunato, 2020), in their multiple facets. It assesses the role of the States and at the regulatory framework in terms of new reforms and public policies aimed at reducing increasing inequalities and capable of facing old and new economic and social challenges.

In the background of the crisis, capitalism models (Hall and Soskice, 2001; Amable, 2003; Burroni, 2016; Streeck, 2016 and 2024; Mazzucato, 2021; Martín-Artiles *et al.*, 2021) and traditional welfare systems (Esping Andersen, 1990; Ferrera, 2006, Klenk and Pavolini, 2015) have been unable to deal with significant transformations, Demographic changes, migration processes, quantitative and qualitative composition of the workforce, unprecedented speed of technological change, affect every function of public administrations' work, and increase the fiscal crisis and the difficulties of the

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

governments. In general, there emerges the difficulty of giving concrete answers to the new economic, political and social challenges.

With this regard, the book draws attention on three key words that are crucial to deeply understand these changes: inequality, public policies and innovation. The chapters, explain how, in different contexts such as Europe and Latin America - innovative public policies and reforms set by States may have an impact on the emerging problems leading also to best practices and solutions.

First, inequality, is multidimensional; in order to obtain a comprehensive overview, analysis has to be extended to those aspects of life which are not just related to available economic income. It requires a look at variables such as work and leisure time; education; environmental and social conditions; access to quality services and goods; recognition of the values and aspirations of the individual; democratic participation in decision-making processes. As argued by Goran Therborn, «inequality, then is not just about the size of wallets. It is a socio-cultural order, which (for most of us) reduces our capabilities to function as human beings, our health, our self-respect, our sense of self, as well as our resources to act and participate in this world» (2013, p. 1). Therborn's definition is a sort of catalogue of the effects that a large set of inequalities generates within the social structure. These are effects that concern people's quality of life and that jointly affect their ways of living their lives and their relations with other people in the wider social context.

Through a systematic analysis and comparison among some European and Latin American countries, the aim is to deepen our knowledge on the state of the art, on the main causes that increase the growth of inequalities and generate new ones. We analyse the role of the main actors, public policies and also contrast strategies in order to identify good practices and possible paths of economic, social and civil development. In fact, as Piketty claimed in the introduction of his latest book, *Capital and Ideology*, «only by adopting a transnational perspective we can hope to understand the weaknesses of these narratives and begin to construct an alternative» (2020, p. 1).

Over the last century, Europe has been characterized by significant changes that have led to high levels of welfare and social cohesion. Over the first decades of the new century, this landscape has been transformed with the onset of the economic crisis, different structural problems and unequal social realities that persist in a globalized world. This context, reinforced by the recent conflicts, has seen the emergence of new forms of social organization in flexible and changing contexts. People looking for different strategies, in an environment less stable and less predictable than in the past. Such strategies require a new analytical approach that considers this new situation that

many authors have termed one of “uncertainty”. Public policies become even more important, and their role is also modified by exposure to an even more changeable context.

Meanwhile, Latin America, characterized by its long economic delay, has begun to implement public policies based on the allocation of citizenship rights for different social actors who were not previously recognized by the State, such as chronic unemployed people, pensioners without contributions, housewives, the chronically ill and allocations to children whose parents do not have stable and formal income. While this is not a generalized process in all countries, such as the ongoing experience of Argentina under Milei’s government, it is interesting to analyse how these policies and approach to public administration aim to overcome structural inequalities that influence the development of each country. The continuing crisis experienced in Latin America has endowed individuals with certain mechanisms that allow them to survive in such contexts. There is much to learn from them. This is especially true since the crisis cycles are coming around in ever diminishing time intervals or are more persistent and concurrent with other crises (ecological, health, or war).

In this global context, it is necessary to recognize the impacts of new social models which characterize the general population and that are being developed in different territories. These models generate a comparative analysis framework that allows the specificities and the common elements of social behaviour of individuals and groups according to patterns of welfare states, socio-economic development and cultural context, social resources and strategies for action in the life-path of people to emerge. It is therefore important to think about the complexity of the issues concerning the structural and relational conditions of institutionalized social inequality.

As far as public policies are concerned, against this backdrop, during the last four years and after the pandemic of Covid-19, several European States (i.e. Italy, Spain, France, Germany etc.) have pursued reforms to improve the performance in public administration by adopting new strategies and programmes. This reform agenda was reflected in the priorities of Recovery and Resilience Plans (RRPs) in such fields as digitalisation, green transition, public employment, policy making and implementation, allocation of responsibilities across government levels, administrative simplification, efficiency of the judiciary system as well as public services modernisation.

On the other side, public administration reforms in Latin America involved a shift from traditional models to market-oriented approaches like New Public Management (Osborne and Gaebler, 1992), followed by a move towards results-based management and new public governance, often driven by international agencies. However, implementation has been inconsistent,

leading to a mix of hybrid and sometimes contradictory models, with significant challenges remaining in professionalizing the civil service, like ineffective performance evaluation systems in many countries (Marenco, 2023) in a general context of institutional deficit.

Recent comparative research in Latin American countries (Cabezas *et al.*, 2025) highlights that administrative reforms are deeply conditioned by political crises, structural inequalities and technological gaps. Nevertheless, significant progress has been made in decentralization and in the promotion of participatory governance models. These results underline the need to overcome structural barriers through comprehensive approaches that incorporate technology, promote equity, and strengthen transparency in governance. Thus, the success of administrative reforms in these areas depends on the ability to design sustainable strategies that respond to social demands and strengthen institutional legitimacy.

In this volume we share the idea that a new equilibrium is possible, but this requires a radical change in decision making processes, in the role of the States as well as of all key actors involved (public and private, individual and collective, market and non-profit organizations). Better policies and instruments can deliver stronger growth and greater inclusiveness. Nonetheless, this is the result of a complex policy mix involving several policy areas such as economic governance, national fiscal policies, labour market, education and skills, competition and product market regulation, innovation and entrepreneurship, financial markets, infrastructure and public services, development and urban governance or the integration of the migrant population. Other than reinforcing policies to enhance competitiveness, it is particularly important to foster equality of opportunities for all people. In fact, relevant factors for individual success are closely linked to the availability and quality of basic services such as education, health, transport, digital infrastructures and the creation of favourable business conditions (business opportunities and financing, active labour market and the possibility to reach it).

On the other hand, the emergence of generative artificial intelligence, like any technological innovation process, creates opportunity to reorient social action and improve the well-being of our society, but it can also pose a threat to the reproduction or even worsening of existing socioeconomic inequalities.

Finally, looking at social policies, we consider the level of innovation introduced by reforms as opposed the past governments. Innovation is nowadays a key pillar for addressing modern challenges in public policy. Integrating emerging technologies and innovative approaches is essential to improving the efficiency, effectiveness, and relevance of public policies. In particular, each chapter adds significant information about new experiences, new

forms of governance, local or national social experiments, ne measurements and indicator, good practices and lessons that can also be learned and implemented by actors in other contexts.

2. From Collaborative Learning to Policy Articulation: The Evolution from INCASI 1 to INCASI 2

This section offers a double thread: on the one hand, it reconstructs the transition from the original INCASI 1 project (2016-2019), the foundational stage of the network and its common language; on the other, it situates this journey in a reflection on the social models and institutional coordination necessary to confront persistent and multifaceted inequalities, coordination that we are currently developing in project INCASI2 (2023-2027, <http://incasi.uab.es>).

From a conceptual point of view, the comparison between Europe and Latin American is a scientific challenge in which social sciences have a long tradition of theorizing and analytical efforts to derive general patterns and empirical generalizations together with the specificities of each socio-historical and developmental context. This comparative research requires reflection and the elaboration of integrative concepts (Estany, 2019) that lead us to the construction of international visions in an exercise of conceptual abstraction and consequent theorization as a heuristic and innovation strategy.

INCASI 1 was, above all, a process of constitution and stabilization of a comparative network between Europe and Latin America. The AMOSIT model, an acronym for Analytical Model of Social Inequalities and Trajectories (López-Roldán and Fachelli, 2021) was developed as a conceptual architecture capable of ordering and integrating diverse topics and methods under the same umbrella. INCASI 2 capitalizes on this relational and cognitive capital, concentrating it on six lines – work, education, stratification, gender, immigration and public policies – and incorporating an instrumental ambition: to build a multidimensional and comparative measure of inequality. In addition, it seeks to expand the science-policy interface through proposals such as the INCASI Living Lab, policy briefs and transfer events. Continuity, therefore, is not mere inertia, but involves an institutionalization of capacities whose purpose is to convert scientific results into policy orientations, preserving comparability between regions and over time.

Maintaining its original formulation, AMOSIT is defined as an analytical model for the study of social inequalities and trajectories, which integrates structural and individual factors in multiple dimensions, which shows the dynamics of social change and allows connecting, from the institutional and

social model point of view, the predistributive mechanisms (regulation of work, education systems, training) with post-distributive mechanisms (taxation, transfers, services). The added value of the model lies in its capacity of organizing heterogeneous evidence and in its ability to align diagnosis and policy design under the same causal grammar. It favors readings sensitive to life cycle and the articulations between the productive and reproductive spheres, between the market, the state and the family.

In INCASI 2, we are developing a multidimensional measure of socioeconomic inequality, called DYSIC (Dynamics of Socioeconomic Inequality in Comparison). It encompasses three main axes as an expression of a causal mechanism: education → occupation → income, from which the gender dimension and the dynamic dimension are introduced to generate three different indexes. We also organize the INCASI Living Lab as an instrument aimed at strengthening the link between research and public decision-making, without renouncing comparative rigor. It consists of a space for reflection and exchange to develop diagnoses, contribute to informed decision-making and the design of public policies.

The accumulated experience led to the proposed a concept of the social model as a typological conceptualization with a structuring scope: its purpose is to order the multiple elements that constitute, on the one hand, the reproduction of socioeconomic inequalities and, on the other, the repertoires of policies to confront them. In a comparative key, this typology underlines the coordination between the labour market (and labour relations) and welfare systems, dialoguing with the literature on varieties of capitalism and offering a map for situating state regimes. The classification, distinguishes between uncoordinated formal economies, coordinated neo-corporate economies, uncoordinated economies and semi-coordinated economies, with differentiated profiles in informality, social coverage, negotiation density and levels of inequality. Its analytical utility is twofold: it allows countries to be placed on the typological space and to infer which policy combinations are feasible and potentially effective given their context. From this perspective, a key conclusion is the need to strengthen the institutions associated with both predistributive and postdistributive policies, and to articulate them in a coherent way. Any attempt at reform that ignores this institutional interdependence will tend to produce limited and volatile impacts, especially under shock conditions.

The comparative evidence supports six observations. First, inequalities tend to attenuate slowly over long-term horizons, and their persistence is explained by reproduction mechanisms that operate from an early age and throughout the life course. Second, the crises – the financial crisis of 2008 and the health crisis of 2020, along with other concurrent crises such as the

ecological or war crises – act as stress tests that reveal the fragility of institutional designs and the vulnerability of certain groups, exacerbating gaps in income, care and participation. Third, political will exhibits an oscillation that often translates into palliative reforms rather than structural transformations. Fourth, ideological alternations imprint discontinuous trajectories on employment regimes – visible, for example, in the regulation of temporary employment – and on the protection architecture. Fifth, regional integration conditions the margins for manoeuvre: in Europe, the social acquis and community frameworks operate as anchors of shared minimums, while in Latin America there is a deficit of regional mechanisms with the capacity for effective coordination. Sixth, isolated sectoral policies yield less than coordinated packages that combine labour regulation, training, minimum wage, industrial policy and gender perspective. These findings justify the commitment to designs that foster stability, coherence and systematic evaluation.

Drawing on Chapter 15 of the collective volume *INCASI Book* (López-Roldán and Fachelli, 2021), we outline a three-part scheme — inequalities, policy orientations, and responsible actors — summarised in Table 1.

In employment and the labour market, precariousness, labour segmentation and its expression in formality and informality, as well as coverage gaps, require, among other policies, those aimed at strengthening collective bargaining. They should ensure effective minimum wages, expand unemployment protection (Social Pact) and deploy active training and requalification policies, with the leading role of ministries of labour and economy, social partners, employment agencies and local governments. In education early selection and differences in achievement according to social and migratory origin demand investment in early childhood, guarantees of inclusive and free education throughout life, guidance systems and compensatory support, with responsibilities distributed among ministries, universities, vocational training, regional governments and educational communities. In gender and care, the sexual division of labour and wage and care gaps justify co-responsible care systems, equal leave, wage audits and proximity services, which call on equality and welfare bodies, local governments, companies, trade unions and feminist organisations. In migration and integration, the exclusion of rights makes it necessary to regularize with equal access to services, the recognition of qualifications and the fight against discrimination, integrating ministries of the interior, labour, education and health, municipalities, civil society and international organizations. Regarding technology and the digital divide, inequality of access and skills, as well as occupational polarization, require universal infrastructure, digital literacy and requalification and regulation of platforms, with the participation of education, innovation agencies and social actors. Finally, regarding social protection, pensions and taxation,

the fragmentation of coverage and effective regressivity advise universal protection floors, redistributive fiscal reforms and complementarity between transfers and services, making responsible finance, social security and welfare, as well as subnational governments and parliaments. Read as a whole, the table does not prescribe isolated measures, but articulated packages that combine pre-distribution and post-distribution under a logic of coordination and participation.

Tab. 1 – Public policies for face inequalities

<i>Area</i>	<i>Observed Inequalities</i>	<i>Recommended Policies</i>	<i>Responsible Actors</i>
Labor market	Labor segmentation, precarious employment, informality	Active policies for vulnerable groups; professional training; minimum wage; regulation against excessive flexibility; gender equality policies; industrial policies	Governments, trade unions, employers' associations, civil society organizations
Education	Inequalities in access and achievement; social stratification	Investment in early education; free university education; tackling school segregation; diverse and adapted curriculum	Ministries of Education, local governments
Digital economy	Digital divide; unequal access to ICT jobs; educational lag	Continuing education; investment in R&D; labor regulation; energy transition; digital privacy	Governments, private sector, educational institutions
Social stratification	Inequality in labor, educational, and income conditions across social classes	Educational expansion; lifelong learning; reconciliation and compensation policies	Ministries of Labor, Education
Social mobility	High class reproduction; barriers to socioeconomic mobility	Free and universal education; access to formal employment; redistributive fiscal policies; minimum income	Ministries of Economy, Education, Social Security
Migrations	Ethnic labor segmentation; downward mobility; institutional exclusion	Legal migration channels; inclusion in formal employment; guaranteed social rights	EU, Mercosur, States, regional and local governments
Economic inequality	Persistent income inequality between and within countries	Redistributive policies; guaranteed employment programs; increased social spending	Ministries of Social Development, Labor, Social Security

Labor trajectories and biographical perspectives	Inequality in access to employment and job continuity	Improved unemployment insurance; job training	Administrations responsible for social protection and labor policy
Time use and gender	Overload of unpaid work; internal inequalities among women	Equal parental leave; care services; promotion of shared responsibility; gender equality education	Ministries of Equality, Social Policies, Labor
Care models and gender	Persistence of unequal gender contracts	Non-transferable leave; public services for child and elder care	Specific ministries of equality or gender
Pension systems	Unequal access to decent pensions	Solidarity-based reforms; expanded coverage; rejection of exclusionary privatized systems	Social security institutions, corresponding ministries

Source: own elaboration over Chapter 15 (López-Roldán and Fachelli, 2021).

3. Transforming Inequality: From Compensation to Coordinated, Capability-Building Policy

If inequalities are interconnected phenomena of high inertia, effective policies must go beyond mere compensation and be aimed at transforming the conditions that generate them. This means, firstly, balancing the pre-distributive and post-distributive pillars: progress in education, employment and negotiation gains effectiveness when they are coupled with progressive taxation and universal services. Second, it requires horizontal intersectorality (work–education–industry–equality) and vertical coordination (national–regional–local), in order to reduce overlaps and close implementation gaps. Third, it calls for institutional stability to cushion the volatility of political cycles: framework agreements, long-term goals, and shared social rules are key to sustaining policies throughout ideological alternations. Fourth, it requires inclusive governance and participation of affected groups, so that policy design and evaluation incorporate situated perspectives and accountability mechanisms. Finally, it presupposes sustained public investment and administrative capacity to execute and learn. These conditions define the horizon of an agenda that conceives equality as a requirement for sustainability and democratic quality.

INCASI 2's offer to the policy ecosystem is structured in three complementary pieces. First, AMOSIT, provides the analytical grammar to study inequalities and trajectories by integrating structural and individual factors. Second, our multidimensional measure under development compares in-

equalities between Europe and Latin America with territorial and temporal sensitivity. Third, the INCASI Living Lab, and in particular the ILL-Dialogues (a multi actor approach seminar), as a co-creation device between academia, decision-makers and civil society aim at designing and testing evidence-based solutions, producing policy briefs and facilitating institutional transfer and learning. Together, these tools seek to close the gap between knowledge and decision-making, maintaining comparative rigor and the vocation of advocacy.

The reform and innovation of public policies in Europe and Latin America depends on the quality of coordination between subsystems and levels of government, and on their cycle-proof institutional anchoring. INCASI's trajectory shows that it is possible to build a common language (AMOSIT), conceptualize socially situated models that guide diagnosis and recommendations, and derive from its policy packages coherent with the capacities of each national system. The analysis of public policies carried out in the context of the INCASI network provides an operational map – inequalities, policies, actors – essential in inter-party and multi-level agendas. Equality, institutional sustainability and democracy form a virtuous triangle that can only be consolidated with coordinated policies, stable public investment and participatory governance. The INCASI network project contributes with frameworks, metrics and spaces for dialogue so that this ambition gains institutional density and transformative capacity in the ultimate objective of promoting social justice. Socioeconomic inequalities are inefficient for society and a brake on the development of countries. From a political and social perspective, inequality undermines values of social justice, tolerance and social cohesion, which entails, in addition to imbalances in different areas of social life and living conditions, greater social spending to maintain social peace. A more equitable distribution of material and immaterial resources means increasing social awareness, as well as positive effects on coexistence, well-being, democratic power, health and quality of life, including sustainability for future generations.

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2. Social order and socioeconomic institutions: New or old trends?

by *Antonio Martín Artilés*

1. Introduction¹

Current socioeconomic models have been built on a certain type of social order. This is the result of previous conflicts and pacts. The current foundations of socio-economic models are based on what was the Keynesian-Fordist Social Pact: agreed after the Second World War, in different phases, between political, trade union and employers' actors (Scharpf, 1992; Judt, 2010; Piketty, 2019). In some Latin American countries, its origin was linked to authoritarian governments, such as Peronism and Varguism (Horowitz, 2010). I am interested in focusing attention on the governance of this order, which is closely related to the complementarity between institutions of the labour market (predistributive) and the welfare regime (post-distributive). (Amable, 2003). However, since the 1980s, the Keynesian-Fordist Pact has been eroding: the complementarity between the labour market and the welfare system has been dismantled. Since the eighties, the neoliberal paradigm has burst onto the scene; bringing with it the discourse of labour flexibility and cuts in the benefits of welfare schemes (Scharpf, 1992; Amable, 2003; Witt, 2018).

For this reason, since those years there has been a renewed interest in the study of social institutions; indicative of this was the reproduction of an influential book by Karl Polanyi (1989): *The Great Transformation*, written and published in 1944. The socioeconomic model, intuited by Polanyi for the post-

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

war period, has contributed to the development of egalitarian institutions from 1950 to 1980 (Sigman and Lindberg, 2015). Egalitarian institutions are understood as three subdimensions: equal rights, fluidity and equality in access to power for all representative social actors, and the redistribution of resources (housing, education, health, pensions and subsidies). However, in the last quarter of a century, egalitarian institutions have been receding.

My aim is to analyse the transformations of predistributive and postdistributive institutions: how they have been transformed after two successive crises: the financial crisis (2008-2013) and the covid pandemic (2020-2022). On the one hand, it seems that pre- and post-distributive complementarity has been drastically eroded during the Great Recession. But, on the other hand, new forms of complementarity are appearing, such as the synchronisation between policies to support the reconciliation of work and family life and active employment policies. Either the complementarity between Public Welfare and Private Welfare in retirement pensions is relatively new, as well as collaboration between public and private services in education and health, among others. In short, are socioeconomic models and the social order being transformed?

Moreover, from the perspective of the liberal moral economy, the promotion of predistributive policies (such as guaranteed universal income) has been demanded; with this, liberals propose a response to the fiscal rebellion of the middle classes (Hacker, 2011). The risk of this formula could lead to the withdrawal of the State's redistributive commitment. The supposed redistribution through wage increases is limited by the level of sectoral productivity. Intersectoral differences in productivity inevitably generate wage inequality. Therefore, the corrective intervention of the State seems necessary. Let us say institutional complementarity (Amable, 2003).

Briefly, the idea of the Active Social State has been installed in European and Latin American political discourse: which means emphasizing the role of predistributive policies rather than redistributive ones. This is possibly driven by the high public debt, the fiscal deficit of many countries, and the return of reactionary thinking (Schaffer, 2021).

In the following pages I examine the debate on institutional complementarity; the role of predistributive and postdistributive institutions; then the recent transformations and finally some conclusions.

2. Premise

Socioeconomic models represent a certain type of institutional order. Streeck (2011, p. 137) defines institutionalism as «a structured system sanctioned by rules of obligation», conceived as a collective order and a mode of

governance that normalizes social action through authority or private contracts. Social institutions are configured as structures that establish rules for politics, economics, and labor relations (Crouch, 1999; Amable, 2003; Menz, 2008). Consequently, institutions represent a certain type of social order that are the result of historical interactions and conflicts between groups and social classes. In this sense, political and economic action is embedded in social relations (Polanyi, 1944 [1989]).

This normative-institutionalist approach is fundamental to understanding social models, as it allows the comprehensive analysis of the normative, organizational and symbolic structures that configure them. This perspective provides a vision of the historical processes that determine the genesis, development and transformation of institutions. Its relevance is accentuated in the current context, marked by globalization and the erosion of institutions. Neo-institutionalism emerges, in this sense, as a critique of neoliberal thought, which has privileged the primacy of markets over the consensual order (Crouch, 1999, 2022; Streeck, 2011; Witt, 2018), among others.

The economy is limited by a historically constructed system of rules and laws (Polanyi, 1989; Judt, 2010; Streeck, 2011). Streeck (2011, p. 137) distinguishes two types of political-economic institutionalism: (1) moral institutionalism, based on shared values and a hierarchical structure; and (2) Weberian voluntary institutionalism, based on consensus among actors (government, businessmen and unions). Both make it possible to reduce transaction costs and coordinate wills; which implies a multi-level governance mode.

In few words, the essential functions of social institutions can be summarized in three dimensions: The first dimension is the provision of social order: through norms that regulate behaviors within formal and informal limits, differentiating coordinated economies — where institutions reduce uncertainty — and uncoordinated, liberal-type economies, where the “invisible hand of the market” is supposed to act (Crouch, 1999; Piketty, 2019). The second dimension is the maintenance of stability and cohesion: through the articulation of social relations; facilitating cooperation and strengthening bonds of collective belonging. And the third dimension is the mitigation of inequalities: through rights and compensatory resources, such as those offered by the “Social and Fiscal State” (Esping-Andersen, 2000; Piketty, 2019).

In short, the institutionalist perspective provides us with a vision of the normative order to understand socioeconomic models. The dimensions that contribute to explaining socioeconomic types can be grouped into two: pre-distributive and postdistributive. The following table 1 shows the categories of these dimensions:

Tab. 1 - Social order. Institutional Complementarities crisis of representativeness of Social Actors

<i>Predistributive institutions</i>		<i>Postdistributive institutions</i>	
Labour Market institutions	Changes in Labour market	Dimensions of Welfare regimens	Changes in Welfare regimens
1. Levels of Wages coordination	Microeconomic trends. Instability of neo corporatism practices	1. Interclasses solidarity	Vulnerable employment: low wages Fiscal resistance Occupational Welfare
2. System of Collective Bargaining	Decentralisation of Collective Bargaining	2. Intergeneration solidarity	Increase number of contributors Immigration
3. Employment Model	Labour flexibility Outsourcing Relocation Technological changes	3. Interterritorial Solidarity	Nationalism Regionalism Populism

Source: Own elaboration.

This examination dialogues with societal institutionalism and the theory of regulation; with this I try to integrate elements of history, sociology, law, politics and economics.

3. Predistributive institutions and social actors

The concept of pre-distribution has a long history linked to the labour and union movement. One of the outstanding historical milestones has been the employment contract. This entailed a transition from the labour contract - governed by Civil or Commercial Law- to the labor contract regulated by Labor Law during the nineteenth century and the first decades of the twentieth century (Crouch, 1999; Esping-Andersen, 2000). In addition, this social progress was subsequently accompanied by other rights, such as trade union rights, the right to representation, collective bargaining and the right of participation of workers' representatives in companies (such as works councils and trade union sections). We must add retirement, sickness, unemployment insurance. Or even other tripartite political institutions such as the Economic and Social Councils (ESC), see Von Zeschau, Sánchez-Mosquera (2024).

4. Tripartism and collective bargaining

The tripartite, born of the Treaty of Versailles (1919), has led to the coordination of wage and economic policy between governments, trade unions and employers. All this through collective bargaining, consultation and social dialogue in the ESCs. Tripartite pacts have gone through different phases, such as periods of expansion to contain inflation during the seventies and eighties; or they have been reached in periods of crisis, such as the recent crisis of the COVID-19 pandemic, which allowed a pact to sustain employment and wages in the face of the paralysis of economic activity. This has shown that order and economic rationalization come from the hands of social actors, not from the market, nor from the invisible hand (Crouch, 2022).

In other words, tripartism is a form of institutionalization of social agreement that involves the government, businessmen and unions and even consumer organizations. Hence, countries with neo-corporatist tripartite structures are called “*coordinated economies*” (Hall and Soskice, 2001). In short, we can say that, through the institutions, a relative decommodification of work can be achieved (Esping-Andersen, 2000).

I must immediately add that the main pre-distributive institution is collective bargaining between employers and trade unions. This institution was originally set up in the United States in 1912 and in the United Kingdom in 1914 (Dunlop, 1978). Since the 1950s, structural-functionalist theories have been paying attention to the institutionalization of collective bargaining, whose origin is associated with the channeling of labour disputes through a system of procedural rules, while at the same time allowing agreements to be reached on substantive rules, such as wages and working conditions (Scharpf, 1992; Esping-Andersen, 2000). Briefly, we can deduce that the labour market is not just any other market, but a political and trade union «social construction based on political and trade union norms and commitments» (Piketty, 2019).

Throughout the twentieth century, predistributive institutions have been created that have contributed to the social insertion of the market (Polanyi, 1989). In short, to the subordination of the labor market to the political order. The result of this historical process is the division of functions: the unions have specialized in pre-distributive economic action and the parties in post-distributive political action. But, in any case, both pre- and post-distributive actions are interacted and complementary (Amable, 2003).

Therefore, we can agree that trade unions are not only economic subjects, but also political subjects, which frequently establish inter-class alliances with parties. In Europe and Latin America, the inter-class alliance between trade unions (working class) and political parties (middle classes) has

marked different political currents, such as social democracy, Christian democracy, communists, developmentalism and even other historical nationalist movements such as Peronism, Batllism and Vargism (Martínez-Franzoni, 2007; Horowitz, 2011).

5. Institutional complementarity

The concept of regulation highlights the existence of institutional arrangements that, throughout capitalist development, have shaped the wage relationship, the interaction between social and political actors, the construction of the social order, and the mechanisms of capital accumulation. In a way, regulation theory offers a systemic perspective on the interaction between the economic, political, and social spheres. In short: it provides an idea of the complementarity between pre- and post-distributive institutions (Amable, 2003; Witt *et al.*, 2018).

The regulatory approach shares with societal institutionalism and functionalism the notion that the economy is embedded in society: subordinated to the political order. This theory emphasizes the role of actors and the correlation of forces between capital and labor (Almond, 2017). An example is Keynesian-Fordist regulation (1950–1980), which underpinned the social contract between capital and labor. This social pact allowed the creation of labour institutions aimed at offering stability and consensus for economic development, as well as channeling social conflict, which is also in line with Parsonian functionalism. This pact constituted the basis of the current welfare regimes; conceived as a political exchange between labor peace and redistribution: growth and political legitimacy in exchange for the reduction of inequalities (Scharpf, 1992; Crouch, 1999; Amable, 2003). The development of this system of economic regulation has been closely associated with the rule of law, which means a commitment to the smooth access to power by unions, businessmen and other social groups.

However, since the 1980s, the social bases of the mode of regulation have been eroded. One of the consequences has been the fragmentation of the working class and, with it, a crisis of collective representation, which also affects employers and dialogue with the State (Grimshaw *et al.*, 2017). This is one of the reasons why there are great difficulties today in the reconstruction of the social pact; although in recent decades, periodic, short-lived neo-corporatist agreements have been reached in crisis contexts, such as in the eighties and nineties or recently during the COVID-19 pandemic (Crouch, 2022; Meardi and Tassinari, 2022).

In summary, both the institutionalist critique and the theory of regulation

agree that economic activity is always inserted in a normative, political and social framework. Both perspectives offer an interdisciplinary and multifactorial approach, revealing the interaction between dimensions such as culture, politics, labour relations, labour market, social protection, education, gender, financial system, economic structure and social capital. The economy, far from being independent or determining, interacts with all of them. The social order is a construction of the actors, not of the market and of the invisible hand that the neoliberals say (Crouch 1999; Amable 2003; Grimshaw *et al.*, 2017; López-Roldán and Fachelli, 2023).

6. Coordinated versus uncoordinated economies

The negotiated social order implies the coordination of economic activity. In the debate on socioeconomic varieties, we can differentiate four models of economies:

1. First, coordinated economies are characterized by centralized institutions of bilateral collective bargaining (employers-unions) or tripartite, where wages and other counterparts such as monetary, fiscal, and industrial policy, inflation control, and welfare measures are agreed (Amable, 2003; Menz, 2008). According to Bruno Amable (2003), there is an institutional complementarity between the labour market and the welfare regime.

Its main features are: a legal principle based on the “autonomy of the parties” (unions and employers) to reach agreements; a strong trade union movement, with high membership, especially in the public sector; institutional participation of trade unions and business organisations in the formal and informal regulation of the labour market; centralised relations at the national level, which protect collective agreements at lower levels; and management of unemployment benefits by trade unions (Sweden).

This model is typical of small countries such as Sweden, Norway, Finland, Denmark, Austria and even, with nuances, Uruguay, where the small size facilitates communication and trust between political, trade union and business elites (Scharpf, 1992; Hall and Soskice, 2001). In large countries, these networks are more difficult to sustain.

In coordinated economies, such as the Scandinavian ones, trade unions are strongly institutionalized, with high membership and, in some cases, participation in boards of directors (co-determination in Germany, co-determination in Scandinavia) (Sanz *et al.*, 2020). Social dialogue plays a key role in macroeconomic governance (Scharpf, 1992; Crouch, 1999; Menz, 2008). This model is still in force in the Nordic countries, although in others it has suffered crises since the nineties (Meardi and Tassinari, 2022).

Coordinated economies have less wage dispersion (Scharpf, 1992). By contrast, decentralized systems, such as the United Kingdom and the United States, show greater inequality and lower collective bargaining coverage. Germany and Austria represent an intermediate model of sectoral neocorporatism, with strong juridification of labor relations and predistributive mechanisms to correct inequalities (Esping-Andersen, 2000; Menz, 2008).

2. Secondly, the mixed coordination model is distinguished. The Mediterranean countries (Spain, Italy, Greece, Portugal) have hybrid economies, with macro wage coordination through collective bargaining, but disarticulation into micro segments (small enterprises and informal economy). The State corrects these dysfunctions with a minimum wage and legal extension of agreements. There is a tradition of State intervention in socio-economic regulation, which is due to the strong fragmentation of the economic process and the requirements of articulation. Consequently, trade unions and employers' organizations have some political influence. But informality makes negotiation and taxation difficult (Sanz *et al.*, 2020; Sánchez-Mosquera and Gutiérrez, 2022).

3. Thirdly, liberal market economies present a contrast with neo-corporatist economies, liberal countries (United Kingdom, Ireland, USA; Chile, Peru, Mexico, Colombia, among others) are considered uncoordinated market economies (Hall and Soskice, 2001). In them, working conditions are determined by supply and demand, under the premise of a self-regulating market that supposedly tends towards equilibrium. State intervention, except to guarantee competition, is perceived as a distortion. There are collective bargaining institutions, but they are decentralized at the company level. This decentralization allows wages to be adjusted to productivity, granting flexibility and speed of adjustment, although it increases wage inequality. Unions are weak, which contributes to “unorganized” capitalism (Crouch, 1999). Policies depend more on the market than on the social pact.

4. Fourthly, we can distinguish the countries of Latin America, whose main burden is informality. In Argentina, Brazil and Uruguay, corporatist institutions and unions with political influence were created in the 1940s. Uruguay stands out for its social institutionality, with a Wage Council created in 1943 that coordinates salaries (Durán, 2025). In Argentina, economic planning worked between the 50s and 60s, within the framework of the “development economy”, and later temporary wage pacts were achieved (Etchemendi, 2019). In 2021, the Economic and Social Council was created, although it was rejected by businessmen (Zeschay and Sánchez-Mosquera, 2024).

However, these countries cannot be considered coordinated economies due to the high volume of informal employment, which hinders collective bargaining, wage policy and taxation, generating a marked duality between formal and informal employment. This segmentation is associated with

structural heterogeneity (Prebisch, 1981), characterized by the coexistence of low-productivity sectors with highly productive ones, which produces high social inequality. Prebisch related this phenomenon to the unequal exchange between central and peripheral economies. Latin American economies are conditioned by factors such as dependence on exports, high informality, self-employment, low qualifications, and atomized labor systems (Chena, 2010; Martínez, 2019; Warnecke-Berger, 2025).

In some countries, there is talk of tripartite models, with social dialogue between government, trade unions and employers, although in a context of dual and hierarchical economy. Since the 1940s, Martínez Fronzoni and Sánchez Ancochea (2016) have characterized them as universalist-stratified or conservative-informal regimes, inspired by the Bismarckian model: based on social protection via labor status, but limited by informality that excludes a large part of the population. In short, there is low institutional labor and social formality (Martínez, 2019).

6.1. Crisis of predistributive institutions

The current debate is posed in a polarized way, which can be summarized in two major theoretical approaches: neoliberal and institutionalist.

First, the neoliberal approach has been arguing that the institutional scaffolding of coordinated economies, such as collective bargaining and wage coordination, has generated sclerosis in the economic system: regulatory rigidities that have made it difficult to adjust in the face of market uncertainty (Streek, 2011). Since the 1980s, neoliberal recipes have promoted flexibility strategies in the collective bargaining system, through the decentralization of collective bargaining to adapt it to the specific productivity levels of each company and sector of activity. In other words, it is committed to microeconomic orientation that would allow a rapid adjustment to fluctuations in economic activity.

Secondly, the flexibility of the employment contract has been another widespread measure in many countries. Here I am referring to temporary contracts, part-time contracts, hourly contracts, weekend contracts, contracts for temporal works and services, etc. Another widespread measure, since the nineties, is the flexibility of the working day. The annual negotiation of the calculation of working hours is becoming increasingly important, but distributed flexibly throughout the year, so that working hours can be increased when there is greater activity and reduced when there is less activity. In other words, the uncertainty of the market has been unloaded on the backs of workers.

Third, the process of flexibilization has been contributing to the segmentation of labor markets (Piore and Sable, 1990). They have paid special

attention to the decentralization of the production process from large companies to small companies. The latter are more flexible and laxer in the application of the rules. The result has been a growing dualization of the economic structure and with it a greater social stratification: differentiation of wages, contracts, working hours and living conditions. Briefly, unions have lost bargaining power in the company and influence politics; their access to power has weakened. This loss of power explains the increase in inequalities in primary or predistributive incomes. Today, these inequalities have increased even in countries with a social democratic tradition, such as the Scandinavian countries, where union membership and the number of workers covered by collective bargaining have fallen (Martín Artiles, 2026).

Fourth, it seems to me that three factors could explain the difficulties of pre-distributive policies: (1) globalization, which makes it difficult to control capital and consequently to apply a fiscal policy necessary for redistribution; (2) the precariousness of employment and the consequent wage devaluation; (3) digitalization and technological innovation, which modifies the occupational structure. In short, all this has contributed to undermining pre-distributive policies (Zalakian and Barragué, 2017).

7. Post-distributive institutions

The post-distributive dimension refers to *ex post* policies, aimed at correcting inequalities that have already been generated previously in the labour market or in society. Therefore, there are policies aimed at mitigating inequalities, such as unemployment protection, insurance or protection for sickness and maternity, retirement pensions, disability, as well as subsidies that seek to correct and mitigate inequalities and risks of poverty. The institutions involved in the post-distributive dimension are Social Security, public employment services, vocational training and retraining centers, etc. In few words, what is defined as Welfare Regimes, which is a broader term than the Welfare State. In the literature we can identify four types of regimes: liberal, conservative, social democratic and dual or segmented.

Welfare schemes are structured around four main models: liberal, conservative-neo-corporatist and social democratic, each with differentiated principles and financing mechanisms.

1. Firstly, we consider the Liberal Regime: it is multipillar: it combines public, private and occupational financing. It was inspired by the Beveridge report (1942), based on a liberal tradition and market-oriented capitalist economies, with residual social policies and minimal state intervention (Palier, 2013). Its origin dates to the Industrial Revolution and the New Poor Law

of 1812 (Piketty, 2019). Currently, it is based on capitalization and complementarity between public and private resources, highlighting the weight of occupational pensions. In countries such as the Netherlands, the US and the UK, pension funds account for a high percentage of GDP, which is evidence of the commodification of the system. The public part, financed by general taxes, offers minimum benefits aimed at avoiding severe poverty.

2. Secondly, we have the conservative-neo-corporatist regime: Founded on the contributory principle, it links social rights to employment, which can make it vulnerable when it becomes precarious. Its origins are in Bismarck's Germany (1883), it was born as a mutualist and corporate model that promotes social cohesion through professional organizations (Clayton and Pontusson, 2006). The current system is based on distribution, with proportional contributions from workers and employers, predominating in Germanic and Southern European countries (Palier, 2013). A variant is the Mediterranean model (Italy, Greece, Spain, Portugal), characterized by the weight and solidarity of the family and the Church (Ferrera, 1996). In addition, there is the weak implementation of the second pillar of capitalization or Welfare Negotiated (Esping-Andersen, 2000).

3. Thirdly, the social democratic model stands out, today taken as an ideal type of reference for egalitarian policies. This is universalist-inspired, financed by taxes and aimed at the decommodification and defamiliarization of welfare. Typical of the Nordic countries (Sweden, Denmark, Finland, Norway), it is based on inter-class alliances, strong trade unions and social pacts between capital and labour, promoting a coordinated economy (Crouch, 1999; Esping-Andersen, 2000). It offers generous and universal benefits, although in recent years it has incorporated complementary capitalization systems.

4. Finally, fourthly, we consider the dual and segmented regimes of Latin America. In this region, the types of regimes can be classified as segmented (Etchemendy, 2019) or as dual, because they are divided between insiders and outsiders: the former with regulated employment and social protection and the latter, with deregulated occupations in the informal economy and without social protection (Cruz-Martínez *et al.*, 2024). Social security schemes have developed in a very fragmented way. This problem has been worsening since the financial crisis of the 1980s.

Dual regimes are more complex. Some analysts today describe four regimes. The first is known as urban stratified universalism (Argentina and Uruguay). This was born as a corporatist system linked to employment. An example of this is that today in Argentina the unions manage the Obra Social that offers health services and other social benefits. In Uruguay there are mutual unions that provide health and security services. This country is the one with the highest degree of social institutionality in Latin America. The

second is the case of Chile, characterized by being a capitalization system, based on commercialized private resources (Martínez-Fronzoni, 2007). The third is a dual regime, with a very low active population covered (Brazil, Mexico) and the rest of the countries are considered as family or exclusionary regimes. In the latter, the provision of services falls on women (Martínez-Fronzoni and Sánchez-Ancochea, 2016; Cruz Martínez *et al.*, 2024).

8. Trends in change

The complementarity between the labour market and the welfare system has been changing for years, and with it the socio-economic models. In the 50s, the bases were intergenerational solidarity, inter-class solidarity and inter-territorial solidarity. Firstly, today intergenerational solidarity has been in the process of changing since the 80s because the employment model has been transformed. In addition, the number of pensioners has been increasing in Europe and the United States, which has increased the dependency ratio and the demand for fiscal support. At the same time, the entry of immigration has become necessary to fill the vacant jobs generated by the wave, demographic crisis and aging of the population. Secondly, inter-class solidarity has also been changing, the expansion of the neoliberal paradigm has brought with it a growing individualism. A reflection of this is the rejection of taxes: there has been a fiscal rebellion of the middle classes; To this we must add that a significant part of the working classes is of immigrant origin, culturally and ethnically different from the middle classes. That makes it difficult to form common interests. The result is the rupture of the inter-class «egalitarian commitment» (Schierup *et al.*, 2006; Schwartz, 2007). And, thirdly, inter-territorial solidarity, the richest territories are reluctant to transfer resources to the poorer territories. The pressure of regionalism and nationalism took care of it.

In contrast, support for the reconciliation of work and family life, coordinated with employment activation policies, stands out as a new form of complementarity (Amable, 2003). Government policies have been giving preference to activation for employment, rather than income redistribution. This has been inspired by the liberal principle that «all ships float at high tide» (Piketty, 2019). The development of activation has led to a considerable increase in female employment. Support for work-life balance through incentives, bonuses and tax deductions for companies is the variable with the most decisive weight in the increase in women's activity rates; although certainly much of this employment ends up being vulnerable, temporary, part-time and low-wage. But this shows a change in preferences in the policies of articu-

lation between the welfare regime and the labor market (Ciccia and Sainsbury, 2018).

Among the structural reforms of welfare regimes, the following stand out: (1) public-private collaboration in services such as education and health, which has spread in many countries. This represents a policy of complementarity between public welfare and private market welfare; (2) there is a trend towards strengthening selective investment in education and retraining of professional qualifications to ensure the return on such investment; (3) Another trend is the push by occupational and private pension schemes to diversify pension funding sources. This is, moreover, a reorientation towards a predistributive policy via private capitalization, which depends on the market, not on the redistributive State; (4) another much more successful trend is the support for work-life balance policies whose function is to activate women's employability and thereby increase the number of social security contributors; (5) the increase in the number of Social Security contributors is a generalized trend in most neighboring countries; (6) another frequent measure is to tackle informality and the underground economy and favor fiscal control; (7) In addition, in some countries, public savings in social spending are being promoted when the economic cycle is upward, such savings are then used as a buffer to cushion changes in the cycle; (8) Another trend is to gradually increase the retirement age above 67, among other measures. In short, all this is in line with the so-called Active Social State (González and Luque, 2015; OECD, 2023)

A differential feature about the institutional approach to the two recent crises has been very different. The financial crisis (2008-2013) was responded to by a harsh austerity policy, which affected the creation of new public employment, wage freezes, increased public debt and increased unemployment, which was particularly hard in Greece, Portugal, Ireland and Spain. And to a lesser extent in other European countries. In Latin America, this crisis was shorter. On the contrary, the response to the crisis of the COVIT-19 pandemic was different: it was oriented towards sustaining employment and income in households. But the index of redistributive institutions (education, healthcare, housing, pensions, and subsidies) has almost stagnated since the Great Recession until after pandemic in Europe. Very few countries have improved. In Latin America, there has been a setback, except for Uruguay (table 2).

Tab. 2 - Typology of social economics models and Redistributive Index (Education, Health, Housing; Pensions, Subsidising)

		Changes: 2008=Base 100				
		Redistribution Index			Great Recession	Post pandemia
		2008	2015	2024	2008-2015	2008-2024
Social democratic	Dk	0,98	0,98	0,98	100	100
	Fin	0,77	0,94	0,96	122	125
	No	0,98	0,98	0,98	100	100
	Swe	0,91	0,94	0,96	103	105
	Total	0,91	0,96	0,97	105	107
Social Partnership	Ger	0,95	0,94	0,94	99	99
	Aus	0,89	0,94	0,94	106	106
	Bel	0,94	0,95	0,96	101	102
	NL	0,89	0,96	0,96	108	108
	Total	0,92	0,95	0,95	103	104
Famillistic Mediterranean	Es	0,88	0,88	0,95	100	108
	Fr	0,82	0,96	0,96	117	117
	Gr	0,92	0,93	0,95	101	103
	It	0,91	0,93	0,93	102	102
	Por	0,82	0,93	0,94	113	115
	Total	0,87	0,93	0,95	106	109
Liberal	Can	0,82	0,90	0,93	110	113
	USA	0,58	0,68	0,66	117	114
	Irl	0,83	0,83	0,86	100	104
	UK	0,82	0,91	0,92	111	112
	Total	0,76	0,83	0,84	109	110
Dualistic L.A.	Arg	0,74	0,71	0,71	96	96
	Bol	0,39	0,42	0,36	108	92
	Br	0,56	0,52	0,52	93	93
	Ch	0,61	0,61	0,59	100	97
	Ury	0,87	0,91	0,93	105	107
	Total	0,63	0,63	0,62	100	98

Source: Own elaboration, data V-Dem (2025).

Finally, it must be said that socioeconomic typologies are not static, but dynamic. The functionalist thesis maintains, since the 1950s, that economic development has an induced effect (spillover effect) on institutions: introducing patterns of convergence. Such institutions adapt to modernization or succumb (Dunlop, 1978). On the contrary, institutionalism argues the “societal effect”: social actors and institutions develop strategies to adapt to external economic and legal pressures, which implies diversity in the way the social order is built (Amable, 2003; Witt *et al.*, 2018).

9. Some conclusions

1. Socioeconomic models have been changing since the Keynesian-Fordist pact. The complementarity between their institutions seems to be shifting toward new hybrid configurations that prioritize labour activation and fiscal sustainability. This transition stems from structural changes such as globalization, job insecurity, demographic pressure, public indebtedness, and economic uncertainty, which, among other factors, have eroded the foundations of the consensual social order.

2. Social institutions remain decisive in shaping these models. Countries with coordinated economies (Scandinavia, Germany, Austria) maintain higher levels of social cohesion, while liberal economies and Latin American ones face serious issues such as fragmentation, informality, and structural inequality. Social dialogue and the fluid access to power by unions, employers, and political parties are essential to sustain consensus, although today we observe a crisis of representation and weakening of collective actors.

3. Classical institutional complementarity has weakened. Predistributive policies have given way to neoliberal strategies of flexibilization and decentralization, which have increased labour segmentation and inequality in primary incomes. At the same time, welfare regimes have undergone reforms aimed at public-private collaboration, pension capitalization, selective investment in education, and the implement of work-family life balance policies, consolidating the so-called Active Social State.

4. Finally, the social order is also transforming: intergenerational, interclass, and interterritorial solidarities are weakening. However, these trends coexist with political risks: the fiscal rebellion of the middle classes, the rise of ultraconservative forces, and institutional distrust threaten democratic stability. In this context, rebuilding lasting social pacts emerges as a central challenge. In short: «I will outline an institutionalist political economy approach to capitalism [that is] a specific type of social order» (Streeck, 2011, p. 137).

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3. Assessing the role of welfare states in reducing inequality: Evidence from EU15 countries in the face of recent global crises (2008-2023)

by *Olga Salido Cortés*

1. Introduction¹

The 2008 financial collapse and the COVID-19 pandemic exposed persistent structural inequalities across Europe and underscored the central role of welfare states in cushioning socioeconomic shocks. Although distinct in origin and policy response, these crises served as stress tests for European social protection systems, revealing institutional strengths and vulnerabilities and offering a unique empirical opportunity to evaluate how different welfare regimes withstand and adapt to macroeconomic turbulence. They also reignited longstanding debates over the redistributive capacity of welfare states and their effectiveness in reducing inequality, stabilising household incomes, and protecting vulnerable groups (OECD, 2015; Cantillon *et al.*, 2019; Béland *et al.*, 2023).

This chapter examines the redistributive trajectories of EU15 welfare states during these two critical junctures. The EU15 provides a rich comparative field, encompassing the main welfare regime types identified in the literature, namely Nordic universalist, Bismarckian continental, liberal Anglo-Saxon, and hybrid Southern European models. The institutional diversity of these systems, combined with the availability of harmonized EU-SILC, allows for a straight analysis of how redistribution evolved across different contexts and policy architectures. In doing so, the study contributes to the

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

longstanding debate on the paradox of redistribution (Korpi and Palme, 1998), which posits that universal welfare systems, though less targeted, may be more effective in reducing inequality due to their broad social and political legitimacy – a claim that has prompted considerable empirical reassessment (Gugushvili and Laenen, 2021).

Although both crises had global repercussions, the intensity of their impacts and the nature of policy responses in Europe diverged not only from those observed in other regions, but also from each other. The Great Recession (2008–2013) was followed by widespread fiscal consolidation and austerity, particularly in Southern Europe, where institutional fragmentation further constrained redistributive capacity (Ferrera, 2017). By contrast, the COVID-19 pandemic, a multidimensional crisis spanning economic, social, and public health domains, triggered a more expansive and proactive policy response. European governments adopted counter-cyclical fiscal measures, such as job retention schemes, emergency transfers, and unconditional support programmes (Eurofound, 2021; European Commission, 2024), marking a clear departure from the austerity paradigm.

The extent to which these interventions were successful in protecting households and curbing inequality, and whether they led to structural shifts in redistributive capacity, remains an open empirical question, particularly given the recent availability of comparative post-COVID data. This study seeks to address this gap by examining whether public interventions became more inclusive and effective over time or whether long-standing institutional constraints continue to shape and limit redistributive outcomes.

Specifically, the analysis focuses on two interrelated dimensions: the effectiveness of social transfers in reducing market-generated inequality, and the degree to which redistributive outcomes varied across regime types and national contexts. Using harmonised EU-SILC data, it compares outcomes from the Great Recession (2008–2013) and the COVID-19 crisis (2018–2023), assessing how the redistributive architecture of European welfare states has evolved under stress and what lessons can be drawn for future resilience.

The chapter is organised as follows. After outlining the theoretical background, research design, and methodology, the findings for 2008–2013 and 2018–2023 are presented, followed by a comparative discussion and concluding remarks.

2. State of the Art and Theoretical Background

The relationship between redistribution and welfare state structures has long been a central concern in comparative social policy research. A corner-

stone of this debate is the paradox of redistribution, formulated by Korpi and Palme (1998), who challenged the conventional assumption that targeted, means-tested welfare systems are inherently more redistributive. Drawing on the power resources approach, they argued that universal programmes — though less progressive in design — generate broader public support, enjoy stronger political legitimacy, and mobilize greater fiscal resources, thereby achieving superior redistributive outcomes and ensuring long-term sustainability.

Since its original formulation, the paradox has generated sustained debate and empirical reassessment. It has been discussed (Abramowitz, 2001; Brady and Bostic, 2015), critically questioned (Marx, Salanauskaite and Verbist, 2013) and revisited in light of changing welfare state dynamics (Oliver and Noël, 2016). More recent analyses have underscored the importance of institutional context, path dependence, and cross-national variation in shaping redistributive outcomes, cautioning against uniform interpretations of the paradox (Gugushvili, 2019; Gugushvili and Laenen, 2021; Béland *et al.*, 2023).

The present study adopts an aggregate approach, focusing on inequality indices – particularly the Gini coefficient – without decomposing the respective effects of taxes and transfers. While such decomposition can provide valuable nuance, our objective is to assess the overall redistributive performance of welfare systems across two major crises: the Great Recession and the COVID-19 pandemic. This comparison highlights continuities and changes in redistributive capacity under distinct economic shocks and policy responses, allowing us to examine whether institutional resilience or divergence has prevailed. To our knowledge, no comparative study has systematically explored these dynamics across EU15 countries using harmonized data up to the most recent period.

Methodological advances have refined income measurement and harmonization (Guio *et al.*, 2021) but have contributed little to comparative evaluation of redistributive trends. Regarding the Great Recession, there is broad consensus that market income inequality rose sharply, largely due to unemployment, while tax–benefit systems played a mitigating – though incomplete – role (Goedemé and Cantillon, 2013). Redistribution was most effective in Nordic and Continental regimes, whereas Southern and liberal welfare states exhibited weaker performance, particularly under austerity constraints (Jenkins *et al.*, 2013; Tasseva, 2016; Ferrera, 2017; Matsaganis, 2018; Hills, 2020).

Emerging analyses of the COVID-19 crisis indicate a shift towards more expansionary fiscal and social responses than those seen during the Great Recession, with extensive reliance on non-contributory transfers, job-reten-

tion schemes, and emergency income support. Comparative evaluations remain limited due to the recency of the data, but early assessments point to a more inclusive and counter-cyclical welfare response (Eurofound, 2021; Béland *et al.*, 2023; Börner and Seeleib-Kaiser, 2023).

3. Objectives and research questions

This study explores the evolving redistributive capacity of welfare states in the EU15 in response to two major global crises: the Great Recession (2008–2013) and the COVID-19 pandemic (2018–2023). Its central aim is to assess whether and how the effectiveness of public transfers (excluding direct taxation), in mitigating market-generated inequality changed across these periods of macroeconomic turbulence. The analysis also seeks to determine how these redistributive effects varied across distinct welfare regimes.

The analysis is guided by the following research questions: i) To what extent did EU15 welfare states reduce market-driven inequality during the Great Recession and the COVID-19 crisis? ii) Did the redistributive performance of welfare states change between the two crisis periods? Iii) How did redistributive outcomes vary across welfare regimes over time?

4. Data and variables

This study adopts a comparative and longitudinal approach to evaluate the redistributive performance of welfare states in the EU15 during two major crises: the Great Recession (2008–2013) and the COVID-19 pandemic (2018–2023). The analysis draws on EU-SILC series published by Eurostat, which provide harmonised, high-quality information on income and living conditions across European countries and are well suited to cross-national and temporal comparisons.

Income is measured at the household level and equalized using the OECD-modified scale. Following Eurostat's published indicators, we work with two concepts: (i) *pre-transfers income* refers to disposable income before social transfers, that is, market income after deducting direct taxes; and (ii) *post-transfers income* refers to disposable income after social transfers, including contributory and non-contributory benefits (pensions and non-pension transfers).

The redistributive effect is assessed by comparing the corresponding pre- and post-transfer Gini Index values, providing a direct estimate of the impact of benefit systems on the income distribution.

5. The Distributive Effect of the Great Recession on EU15 (2008-2013)

The 2008 financial crisis caused a sharp contraction in market incomes across the EU15, particularly in Southern Europe, reaching unprecedented levels, nearly -40% in Greece and around 16% in Spain and Ireland. These dramatic declines reflected the scale of the economic disruption — surging unemployment, wage cuts, and firm closures and widespread austerity policies. Yet the deterioration in living standards was partially cushioned by welfare states: in most countries the fall in disposable income (post-transfer) was markedly smaller than that in market (pre-transfer) income. In a few cases, such as Portugal and Finland, disposable income even rose slightly, illustrating the buffering effect of transfers and taxes (Eurostat, online dataset).

The Great Recession not only disrupted market income flows but also intensified inequality across the EU15. Figure 1 presents the change in Gini indices for pre- and post-transfer income between 2008 and 2013. In most countries, pre-transfer inequality rose, with especially pronounced increases in Southern Europe (Spain, Portugal, Greece). By contrast, post-transfer inequality rose far less, remained broadly stable, or even declined in several Northern and Continental countries. This pattern highlights the capacity of social protection systems to absorb a substantial share of the market-income shock, while also revealing the limits of redistribution under fiscal austerity.

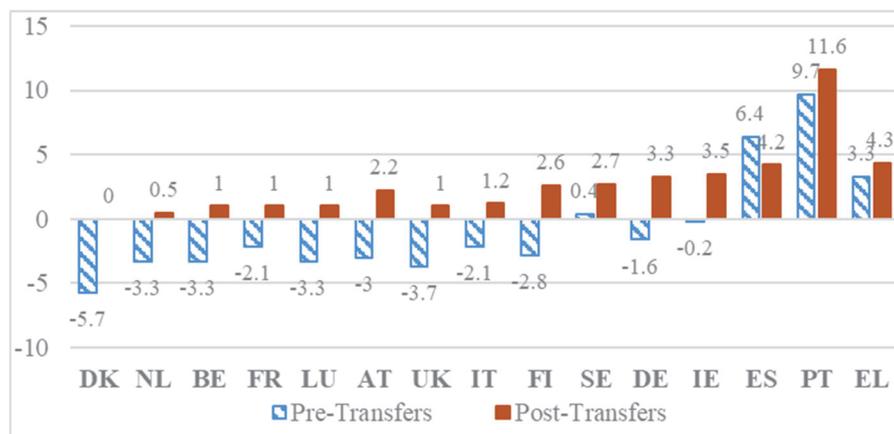


Fig. 1 - Redistribution effect of transfers in EU15 countries (2008–2013)

Source: Eurostat, Gini coefficient of equivalised disposable income before social transfers [ilc_di12b] and after social transfers [ilc_di12].

At the same time, the contrast between pre- and post-transfer inequality reveals marked cross-national variation in redistributive effectiveness. Nor-

dic countries (e.g. Denmark, Finland) maintained robust capacity, substantially reducing final inequality through universal benefits and progressive taxation. Continental regimes (e.g. Germany, France) achieved moderate success via social insurance and targeted transfers. Southern European countries were less effective: despite interventions, post-transfer inequality in Spain and Greece remained well above the EU15 average, reflecting structural constraints in more fragmented welfare states that were compounded by austerity (Ferrera, 2017). Liberal regimes such as Ireland and the United Kingdom also struggled, displaying a relatively weak redistributive impact. While these results broadly align with welfare-regime typologies (Esping-Andersen, 1990; Arts and Gelissen, 2002), they also underscore that institutional design alone does not determine outcomes: policy responsiveness, administrative capacity and political will proved decisive in shaping inequality trajectories during the crisis.

A more structural perspective offers deeper insight into redistributive dynamics. Figure 2 plots pre- and post-transfer Gini indices for 2008 and 2013. The vertical and horizontal red lines divide the graph into four quadrants, classifying countries according to their overall distributive outcomes. This framework allows us to evaluate both the depth and consistency of redistribution across welfare regimes and to observe the extent to which market inequalities were effectively corrected over time.

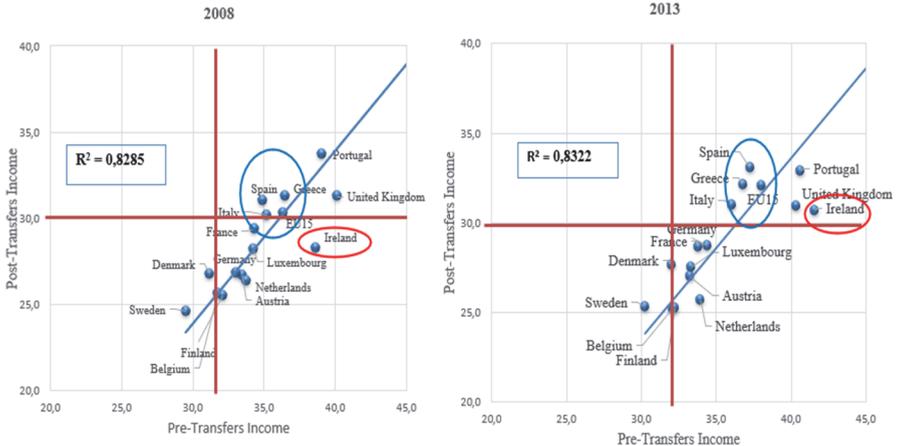


Fig. 2 - Pre- and post-transfers Gini Indices (2008 and 2013)
 Source: EU-SILC, 2009, 2014 (income data refer to the year preceding the survey). Own elaboration.

Countries in the lower-left quadrant (Sweden, Finland, Belgium, and Denmark) combine relatively egalitarian market structures with strong redistribution. In these systems, automatic stabilisers embedded in universal pro-

grammes operated effectively throughout the downturn, maintaining low levels of final inequality. At the opposite end, Portugal, Spain and Greece, together with the United Kingdom, cluster in the upper-right quadrant, combining high inequality both before and after social transfers — an outcome consistent with more limited or fragmented redistributive capacity under austerity constraints.

A third group – France, Germany, Luxembourg, Austria and the Netherlands – lies in the lower-right quadrant: despite higher market inequality, these countries achieve substantial post-transfer reductions via social insurance. Ireland also aligns with this latter profile in both years: it starts from very high market inequality and records sizeable post-transfer Gini reductions.

Finally, no countries appear in the upper-left quadrant (low market inequality, high final inequality), reaffirming the basic directionality of redistribution in Europe: while intensity varies across regimes, redistribution consistently acts to reduce rather than amplify inequality. The 2008–2013 period thus illustrates both the resilience and the limits of European welfare states — effective in cushioning market shocks yet constrained in their capacity to reverse the structural roots of inequality.

6. The Distributive Impact of the COVID-19 Crisis on EU15

The COVID-19 crisis differed fundamentally from the Great Recession. Unlike the financial shock of 2008–2013, the pandemic was a multidimensional emergency – health, social, and economic – met with unprecedented counter-cyclical measures. Rapid action was taken to mitigate the impact of the crisis on household finances – albeit taking various forms and with varying degrees of generosity. While introducing novel policy instruments in several cases, these responses also drew, at least partly, on pre-existing national welfare legacies (Béland *et al.*, 2023).

Figure 3 shows that changes in inequality between 2018 and 2023 were moderate overall but varied widely across countries. Pre-transfer inequality declined in several cases – most notably in Sweden, Germany, Portugal and Luxembourg, and to a lesser extent in Ireland, Greece and Spain – while it increased slightly in France and remained broadly stable elsewhere. Likewise, post-transfer income inequality either decreased or held steady across most countries, reflecting the capacity of social protection systems to cushion households from the effects of the pandemic. As fiscal support measures were gradually withdrawn from 2022 onwards, some redistributive gains began to fade, particularly in countries with weaker or more fragmented welfare institutions.

Taken together, these results confirm that European welfare states played a stabilising role during the pandemic, preventing a rise in post-transfer inequality despite major disruptions in labour markets. Yet persistent cross-national disparities in redistributive capacity remained, revealing once more the structural divide between universalist and fragmented welfare architectures.

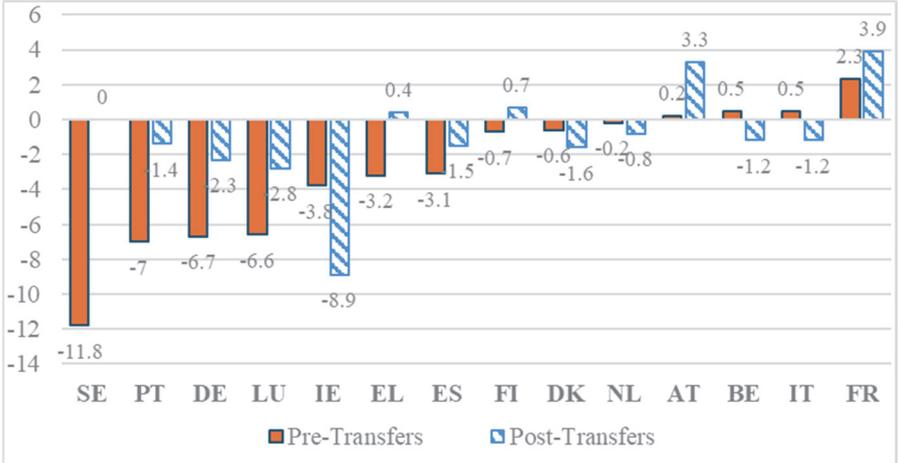


Fig. 3 - Change in Gini Index for Pre-transfer and Post-transfer Income. EU15 (2018-2023)

Source: Eurostat, Gini coefficient of equivalised disposable income before social transfers [ilc_di12b] and after social transfers [ilc_di12].

To complement the diachronic view of inequality trends, Figure 4 offers, as before, a structural comparison by plotting pre-transfer income inequality (x-axis) against post-transfer income inequality (y-axis) for each EU15 country in 2018 and 2023. The relationship between market and disposable income inequality remains strong, though somewhat weaker than during the 2008–2013 period. This suggests that, while initial income structures continue to shape final outcomes, the link between market inequality and redistributive performance has become somewhat more diffuse in the aftermath of the pandemic. Structural patterns of inequality therefore persist, but with greater cross-national dispersion contexts, reflecting differentiated fiscal responses and welfare capacities.

Countries such as Belgium, Denmark, Sweden, and the Netherlands consistently occupy the lower-left quadrant, which represents the most favourable configuration – relatively egalitarian market structures combined with strong redistributive capacity. These outcomes reflect the institutional strength of universalist and corporatist regimes, whose built-in automatic stabilisers continued to perform effectively throughout the crisis.

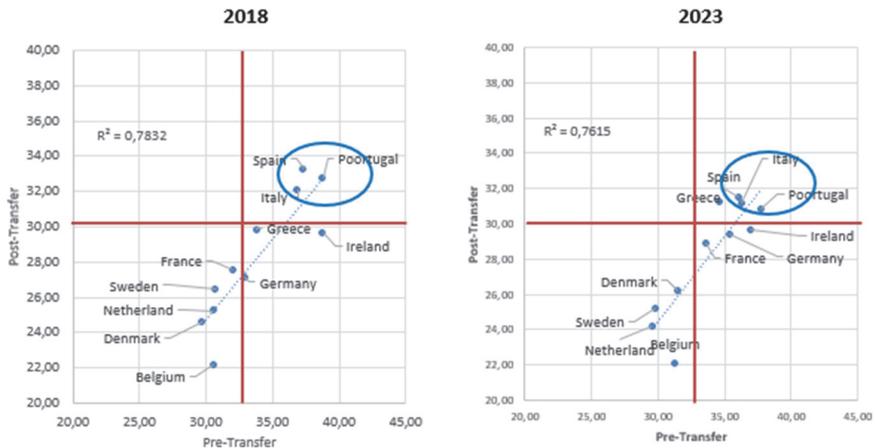


Fig. 4 - Gross and Disposable Gini Indices (2018 and 2023)

Source: Own elaboration based on EU-SILC, 2009, 2014 (income data refer to the year preceding the survey).

At the opposite end of the spectrum, Spain, Italy, and Portugal are persistently located in the upper-right quadrant in both years, indicating high levels of inequality both before and after transfers. This persistent structural disadvantage underscores the limitations of fragmented or dual welfare systems, which struggle to fully compensate for market-driven inequality. Southern European regimes showed enduring weaknesses in redistributive performance despite emergency interventions.

A third group of countries – France, Germany, and Ireland – occupies the lower-right quadrant, characterised by high market inequality but substantial post-transfer reductions. Ireland stands out for its improvement between 2018 and 2023: though still one of the more unequal countries, its post-transfer Gini levels converged closer to the EU average, pointing to a more inclusive policy response during the pandemic.

As in the earlier period, no country occupies the upper-left quadrant -defined by low market inequality but high final inequality. The continued absence of cases in this quadrant supports the conclusion that the European tax-benefit architecture retains a fundamentally equalizing orientation, even under stress of major crises.

7. A Shifting Landscape of Redistribution in Europe (2008–2023)?

The comparative analysis of the 2008-2013 and 2018-2023 periods reveals a landscape marked by both institutional resilience and growing divergence. In both periods, there is a strong correlation between countries' pre-transfer and post-transfer Gini indices, highlighting the path-dependent nature of distributive outcomes in Europe. Welfare states play a stabilising role, mitigating disparities but seldom reversing the distributional patterns generated by markets.

However, the wider dispersion observed around the regression line in 2018–2023 suggests that the pandemic and subsequent inflation widened cross-national differences in fiscal capacity and policy responsiveness. While the redistributive architecture remained intact, its coherence weakened modestly, reflecting the differentiated ability of national welfare systems to sustain high levels of support once emergency measures were withdrawn.

The structural comparison between the 2008–2013 and 2018–2023 periods reveals remarkable stability in the configuration of country clusters. The long-standing core-periphery divide continues to shape European redistribution. Universalist and corporatist regimes – such as those of the Nordic and Continental countries – maintain relatively low inequality across both pre- and post-transfer distributions, showing remarkable institutional stability. In contrast, Southern European countries (Spain, Greece, Portugal, and, to a lesser extent, Italy) persistently occupy the upper-right quadrant, characterised by high market inequality and limited redistributive impact. These enduring weaknesses reflect structural constraints – fragmented benefits, weak tax progressivity, and fiscal limitations – that curtail the equalising capacity of the state.

Nonetheless, some noteworthy shifts emerge. Ireland and France improve their relative positions, reflecting more inclusive and expansive policy responses during the pandemic compared to the austerity logic of the previous crisis. By 2023, Belgium also joins this group of high-performing redistributive systems. Conversely, Greece shows temporary progress early in the period but regresses by 2023, signalling renewed structural strain. Portugal's and Italy's positions remain broadly stable, though slightly less favourable, consistent with the gradual withdrawal of pandemic-era supports.

A broad cluster of Continental and Nordic countries – including Germany, France, Italy, Sweden, Denmark, and the Netherlands – continues to form a stable middle group. Their redistributive impact remains moderate and relatively homogeneous across countries. This pattern reflects enduring institutional resilience and the continued effectiveness of core welfare mechanisms, despite persistent fiscal and political pressures.

Taken together, the structural comparison between the two crises reveals continuity rather than transformation. The correlation between market and disposable inequality remains strong, though marginally weaker in the later period, indicating persistent dependence on initial income structures. The welfare state's role continues to be primarily compensatory rather than transformative: redistribution softens disparities but seldom alters the hierarchy of market incomes.

In sum, the 2018–2023 period confirms the findings from the Great Recession: European welfare systems are resilient but uneven. The most effective outcomes occur where inclusive market institutions coexist with comprehensive redistributive systems, whereas countries with fragmented arrangements and high structural inequality continue to lag behind, despite intensified fiscal efforts during the pandemic.

From a policy standpoint, these findings underscore the importance of both preserving existing redistributive frameworks and adapting them to new socioeconomic risks. Lower-performing countries need structural reforms to strengthen targeting, broaden coverage, and ensure adequacy of fiscal interventions; higher-performing systems must maintain effectiveness under demographic and budgetary pressures. Crucially, renewed emphasis should be placed on pre-distributive policies – active labour-market measures, wage regulation, and universal access to essential services – to reduce inequality at its source.

8. Conclusions

This study assessed the redistributive effectiveness of EU15 welfare states across two major crises – the Great Recession (2008–2013) and the COVID-19 pandemic period (2018–2023) – offering new comparative insights into how different welfare regimes adapt under stress. While both crises generated sharp increases in market inequality due to labour market shocks, the state's capacity to buffer their distributional consequences varied significantly over time and across countries.

In both periods, welfare states played a critical role in stabilising household incomes, though with uneven outcomes. During the Great Recession, the scope of public intervention was curtailed by austerity policies and limited fiscal space, particularly in Southern Europe. The redistributive impact was largely shaped by pre-existing institutional arrangements, with Nordic countries performing most robustly, while Southern and liberal regimes showing limited compensatory capacity. By contrast, the response to the COVID-19 crisis marked a significant shift in policy logic. Governments

implemented broader and more inclusive fiscal measures, expanding non-contributory transfers and relaxing access to support and deployed large-scale job-retention schemes. As a result, post-transfer inequality remained largely stable between 2018 and 2023 despite rising market inequality. Countries such as Ireland and Belgium achieved notable gains, whereas Spain and Greece continued to lag, underscoring the importance of institutional capacity and political commitment.

Overall, the findings confirm that redistribution in Europe is stabilising rather than transformative. Structural patterns – the core-periphery divide and welfare regime differences – persist across time. At a structural level, pre-transfer inequality remains the strongest predictor of final income distribution, reaffirming the path-dependent nature of inequality in Europe: redistribution mitigates disparities but does not fundamentally reorder the distributional hierarchy.

From a policy perspective, strengthening resilience requires not only protecting universalism and reinforcing tax progressivity, but also complementing post-market redistribution with credible pre-distribution – active labour-market policies, wage floors and universal access to essential services – to address inequality at its source. More broadly, redistribution should be embedded as a core function of economic governance rather than a crisis-specific instrument. In an era of renewed uncertainty, effective and inclusive fiscal policy remains essential to sustaining social cohesion and democratic legitimacy in Europe.

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4. Measuring Poverty Across Contexts: A Comparative Policy Lens

by *Emmanuelle Barozet*

1. Introduction¹

In this chapter, we assess the conceptual, methodological and empirical contributions of one indicator that generates the most technical and political debate at the international level: the measurement of poverty. Civil society and political groups support this dialogue, which draws on current debates in economics, sociology, and public policy. The comparison between Europe and Latin America in relation to this indicator provides insight into one of the main pillars of social policymaking.

We analyze income poverty and the composite indicator of multidimensional poverty from a comparative perspective. Our goal is to synthesize our knowledge and understanding of poverty, in a period of new international trends in capitalism, social models, and welfare systems. This analysis takes place in context of difficulties in responding to new economic, political, and social challenges, especially after the COVID-19 pandemic, which has caused significant setbacks in this area.

Poverty is a condition in which individuals, families, or communities lack the financial resources – income or monetary poverty – and essential goods

¹ This document is based on the work of the Presidential Commission for the Updating of the Measurement of Poverty in Chile, of which the author was a member (December 2023-July 2025). Also, it was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them. Acknowledgement: Projects COES ANID/FONDAP/1523A0005, UCHILE AYW076/24. I would like to thank my colleagues at the Commission for the richness of the discussions and the atmosphere of consensus, as well as the members of the Ministry of Social Development, ECLAC and INE who were part of the discussions and technical decisions.

and services – multidimensional poverty – necessary to maintain a minimum standard of living.

From a theoretical perspective, the human rights-based theory and Sen's capabilities approach (Sen, 1976) provide the framework for measuring poverty. The contributions of The Oxford Poverty and Human Development Initiative (OPHI), built on the Alkire-Foster Method, laid the foundations for multidimensional measurement. It complements the use of unidimensional indicators, such as the World Bank's absolute measure – minimum income or expenditure per day – or the Organization for Economic Co-operation and Development (OECD) – half the median household income, which facilitate international comparisons. Multidimensional poverty measures now supplement income-based methods, acknowledging that well-being includes more than financial resources. These different measures enable comparison and harmonizing quantitative data sources, considering that data availability is an important challenge. From the point of view of data production, one of the major debates has to do with the comparability of the data at the regional and at the international level, and its implications for public policy. Using different variables makes it difficult to compare these indicators, raising the question of which dimensions and indicators of deprivation should be strategically included. Usually, three dimensions are central (health, education and living standards), but some countries have included additional factors, to mitigate emerging conditions.

In this context, this chapter aims at synthesizing knowledge and contributing to the international debate through the comparative analysis of poverty as the baseline to elaborate public policies. Without this instrument, and without constant innovation in its use, there are limitations to the possibility of reforming social policies.

This chapter organizes itself as follows. The first part presents the difficulties that poverty reduction has met since COVID-19. The following section examines various poverty lines, their measurement methods, and their limitations, at a global level, in Europe and Latin America, comparatively. Multidimensional poverty is the focus of the third part, along with its dimensions and indicators. We conclude the chapter with the challenges these measures face today.

2. A new context for poverty measurement

Although the United Nations (UN) set ambitious goals in 2015 for reducing global poverty by 2030, over the last 10 years, new challenges have diverted us from the promising curve of the 1990s and 2000s.

2.1. Poverty and the 2030 Agenda for Sustainable Development Goals

The eradication of extreme poverty on a global scale is the first target of the 17 Goals of the 2030 Agenda for Sustainable Development implemented in 2015 by the UN, which sets out to reduce by 2030 at least by half the proportion of men, women and children living in poverty in all its dimensions (UNDP-OPHI, 2023). Ten years after the launch of this plan and five years before the 2030 target date, the outlook is not promising. Extreme poverty fell rapidly between 1990 and 2019, but this trend reversed from 2020 onwards, with 692 million people living in extreme poverty in 2024 (World Bank, 2024), roughly the same as before the crisis. In 2025, 1 in 10 people worldwide live in extreme poverty, a situation that has not improved in recent years. Over the same period, multidimensional poverty has increased. The poorest region is sub-Saharan Africa. Without more action, 8.9 percent of people may still face extreme poverty globally by 2030. Only one in five countries will have achieved the goal of halving their poverty rate by that date (UN, 2025a). According to OPHI's multidimensional measurement, in 2023, 1.1 billion people lived in acute multidimensional poverty, almost double the number living in extreme income poverty (UNDP-OPHI, 2023).

2.2. The characteristics of the last decade and their impact on poverty

The years 2020-2030 are likely to be a lost decade, largely due to the effects of the COVID-19 pandemic, the inflationary crisis, changing commodity prices, a widespread increase in the cost of living, economic austerity alongside wealth inequality, declining public trust, organized crime, forced migration, environmental issues, and emerging questions about global technological security (World Economic Forum, 2023). Societies today face a complex phase of overlapping global crisis, termed a polycrisis (Morin *et al.*, 1999), that surpasses institutional capacities. Over the last ten years, these crises have intensified, threatening well-being and even survival, causing instability and endangering core societal values. These interconnected risks produce compound effects, amplifying their overall impact. Together, they form a systemic threat that demands urgent and coordinated responses beyond traditional crisis management frameworks (Swilling, 2020), to limit the increase in poverty.

Second, some Western governments have changed their basic assumptions, with doctrines and policies that view the State as problematic and needing

reduction to free the market, especially in the United States and Argentina. Even in countries with reliable poverty statistics, using poverty rates for political ends creates challenges amid criticism of expert knowledge (de Villalobos, 2025). This raises a new question about overcoming poverty when the State is not necessarily providing support and institutional intermediation.

The third question is the dependence on international cooperation funds for poverty measurement, which poses a major challenge in polycrisis. The current decline in multilateralism and international aid reinforces these trends. This is not only because the polycrisis generates higher expenditure and lower income but also because implementing policies to reverse this situation depends on up-to-date and comparable figures. 70 percent of all financial support for data and statistics in 2022 depended on international organizations, including the World Bank (26 percent), the Inter-American Development Bank (10 percent) and governments (United States of America (14 percent). In low-income countries, 90 percent of survey funding depends on external sources (UN, 2025a). For example, the closure of USAID program in February 2025 has had significant consequences for the funding of public statistics.

3. Types of poverty lines and their limitations

Historical and economic differences, along with data production, account for the differences in how measurements are established at the global level, in Europe, and in Latin America.

3.1. Absolute poverty as a starting point

Despite these differences, the absolute poverty line estimates the cost of a set of goods considered guaranteeing basic consumption needs. Developing countries typically apply absolute poverty thresholds. According to the World Bank (2024), extreme poverty corresponds to those living on less than US\$2.15/day (2017 purchasing power parity or PPP), while poverty uses the US\$6.85/day PPP 2017 line. The UN revised poverty thresholds: extreme poverty between US\$2.15 and US\$3.65 per day (one billion people, 15 percent of the world's population) and poverty between \$3.65 and \$6.85 per day (about 1.9 billion people, 28.5 percent of the world's population).

To compare countries, the poverty line might be set too high in developed countries and too low in developing countries (OECD, 2013). Therefore, two different lines may be used, depending on the income level of the countries. For example, the World Bank assumes that the US\$2.15 line is too low for

middle-income countries. Therefore, the US\$3.5 measure is used for middle-income countries and US\$6.85 for upper-middle-income countries (UN, 2025b). In June 2025, the World Bank published new estimates based on a review of poverty lines according to countries' income levels: from US\$2.15 to US\$3.00, from US\$3.65 to US\$4.20, and from US\$6.85 to US\$8.30 (World Bank, 2025).

Tab. 1A - Poverty estimates for reference year 2022, changes between September 2024 and June 2025 vintage by region and poverty lines

Region	\$2.15 / \$3.00				
	Survey Coverage (%)	Poverty rate (%)		Number of poor (mil)	
	Jun 2025	Sep 2024	Jun 2025	Sep 2024	Jun 2025
East Asia & Pacific	94.4	1.0	2.5	20.3	54.0
Europe & Central Asia	93.4	0.5	1.1	2.4	5.3
Latin America & Caribbean	90.0	3.5	5.2	22.6	33.6
Middle East and North Africa	66.7	6,1	8.5	26.1	37.1
Other High Income Countries	90.8	0.6	0.7	7.1	7.8
South Asia	84.1	9.7	7.3	186.2	141.5
Sub-Saharan Africa	48.8	37.0	45.5	448.0	558.8
Western and Central Africa	41.1	27.3	33.8	134.0	167.9
World	82.5	9.0	10.5	712.8	838.0

Source: World Bank, 2025, p. 3 (Note: regions lacking sufficient data are highlighted in gray).

Tab. 1B - Poverty estimates for reference year 2022, changes between September 2024 and June 2025 vintage by region and poverty lines

Region	\$4.20 (2021PPP)				\$8.30 (2021PPP)			
	Poverty rate (%)		Number of poor (mil)		Poverty rate (%)		Number of poor (mil)	
	Sep 2024	Jun 2025	Sep 2024	Jun 2025	Sep 2024	Jun 2025	Sep 2024	Jun 2025
East Asia & Pacific	5.4	6.7	115.2	143.0	27.4	31.8	584.2	679.2
Europe & Central Asia	1.7	2.4	8.5	12.0	8.2	12.0	40.3	59.3
Latin America & Caribbean	8.9	9.4	58.2	61.1	25.2	28.6	165.0	185.2
Middle East and North Africa	16.2	15.0	69.4	65.4	45.5	49.8	195.1	217.8
Other High Income Countries	0.8	0.9	9.3	9.9	1.3	1.6	14.3	18.2
South Asia	38.8	27.7	744.5	535.7	78.8	82.1	1513.3	1585.5
Sub-Saharan Africa	64.2	63.1	777.3	775.8	87.7	88.4	106.7	1086.6
Easter and Southern Africa	68.4	69.5	492.8	508.3	88.5	89.9	638.1	658.0
Western and Central Africa	58.0	53.8	284.6	267.5	86.4	86.2	423.7	428.6
World	22.4	20.1	1782.6	1603.0	44.9	48.0	3574	3832

Source: World Bank, 2025: 3 (Note: regions lacking sufficient data are highlighted in gray).

A key challenge in measuring absolute poverty is the need to update the PPP dollar standard regularly to reflect socio-economic changes. Inflation in recent years has shown how difficult it is to keep up with these updates.

3.2. The fundamentals of one-dimensional income measure

We will now explain the fundamentals of one-dimensional income measurement. Since the late 19th century, one of the first measures used both nationally and internationally has been the income poverty line (Townsend, 1954), as part of the family of absolute measures. It refers to the per-person income required to meet basic needs. A poverty line defines monetary poverty based on household income and size. Identification of extreme poverty is based on the criterion of basic needs satisfaction, defined by caloric intake as the normative criterion for determining the minimum necessary in terms of food and nutrition. This corresponds to Food and Agriculture Organization (FAO) guidelines, which set this caloric standard at 2,000 kilocalories per person per day. The selection of foods constructs the basic food basket to measure poverty. This selection includes the necessary goods to cover the nutritional needs of the population.

The poverty line equals the cost of a basic food basket plus essential non-food expense. To this end, the extreme poverty line is multiplied by a factor (Orshansky coefficient), which corresponds to the quotient between total expenditure and expenditure on food for a reference population. The thresholds for poverty and extreme poverty are revised annually to reflect adjustments in the consumer price index. Total household income includes all cash and non-cash earnings of its members, such as wages, pensions, transfers, asset income, and imputed rent (Comisión Experta, 2025).

The calculation of income poverty lines relies on surveys that measure household expenditure, which are conducted with a periodicity of five to ten years in most Latin American countries, usually employment and household surveys (ECLAC, 2018).

3.3. Relative poverty: looking at inequality alongside poverty

Relative poverty is a standard of living defined as an income distribution (such as the mean, median or some quintiles), typically 50 percent or 60 percent being used as thresholds. It places more emphasis on the distributive aspect than on the level of absolute deprivation in households. Developed countries widely use it, including those in Europe and the OECD, except for the United States and Canada.

This measure is based on the relative position of advantage or disadvantage of individuals and households in relation to other members of society. Indeed, as countries make progress in reducing poverty, the relative aspects of the phenomenon become increasingly important. Being well below

the ‘normal’ standard of the society in which one lives is a source of discrimination, segregation, and lack of opportunities. However, as this measure emphasizes the income gap between social strata, it does not reflect the level of income in the country (Garroway and de Laiglesia, 2012).

3.4. Looking from another angle: subjective poverty

Finally, subjective poverty measures perceptions or feelings about poverty. Although it is subjective, there are standardized ways of asking in surveys about subjective poverty since the 1970s. International comparisons only date back to the 1990s. In that case, people define what makes up a socially acceptable minimum level in each society.

This is a self-assessment where individuals and households consider themselves poor if they believe they cannot meet their basic needs or live with dignity, regardless of actual income or objective criteria (Duvoux and Papuchon, 2019). The answer is an increasing function of actual income and therefore there is a high overlap with the notion of vulnerability (OECD, 2013). Both the European Union (EU) and nations outside its borders have adopted this measure, but Latin America has implemented it less.

4. A more multifaceted elaboration: the reasons for extending the measurement to multidimensional poverty

During the 1970s and early 1980s, the proportion of individuals experiencing deprivation in certain socially recognized needs became an important metric for assessing social exclusion. Living standards differ not just by income, but also by household access to essentials like water and electricity. This prompted reflection on how to measure additional dimensions of poverty.

4.1. The foundation of multidimensional measurement

Two families earning US\$3 may have quite different qualities of life depending on where they live and what services they have access to. Monetary measures alone cannot reflect overall welfare, so researchers also assess deprivations alongside income poverty. Dividing data by dimension allows anti-poverty policies to be grouped by sector. In all cases, regardless of the dimensions and indicators chosen methodologically, researchers assess when

people reach minimum thresholds of well-being in each of the indicators considered. Then, minimum thresholds are set for each dimension and merged to create a synthetic index.

In the 2000s, Alkire and Foster created an aggregate measure (Multidimensional Poverty Index, MPI). This method describes distinct steps to define the dimensions and then aggregate them in an index. It also measures the intensity of poverty (Alkire and Foster, 2007). Desirable attributes in Alkire and Foster’s poverty measurement are: 1) It should be understandable and easy to describe; 2) It should reflect the ‘common sense’ understanding of poverty 3) It should be fit for the purpose for which it was developed 4) It should be technically sound 5) It should be operationally workable (data requirements) and 6) It should be easily replicable (Alkire *et al.*, 2015).

4.2. The institutionalization of multidimensional poverty and the question of data

The World Bank subsequently adopted the Alkire and Foster method to create multidimensional non-monetary poverty indicators. Experts also use it to assess poverty-related policies. In 2017, the World Bank published a global report entitled Global Poverty Monitoring, recommending the use of the Alkire and Foster method to create multidimensional indicators of non-monetary poverty. It emphasized the use of scales adapted to national contexts in each country’s poverty reports. In 2018, the global MPI was first used to track progress during the UN Decade for the Eradication of Poverty (2018–2027). Subsequently, in 2019, the same institution published the Global Sustainable Development Report with indexes based on the Alkire and Foster method (both national and global, identifying groups lagging). Finally, in 2024, the World Bank included the global MPI in the World Development Indicators.

Tab. 2 - Dimensions of well-being and indicators of deprivation

<i>Dimensions</i>	<i>Three dimensions (119 economies)</i>	<i>Five dimensions (6 countries)</i>
Monetary Poverty	Daily consumption or income is less than US\$1.90 per person	Daily consumption or income is less than US\$1.90 per person
Education	At least one school-age child up to the age of grade 8 is not enrolled in school. No adult in the household (age of grade 9 or above) has completed primary education.	At least one school-age child up to the age of grade 8 is not enrolled in school. No adult in the household (age of grade 9 or above) has completed primary education.

Access to basic infrastructure	The household lacks access to limited-standard drinking standard. The household lacks access to limited-standard Sanitation The household has no access to electricity.	The household lacks access to a basic-standard drinking water ("limited-standard" with an added criterion of the source being within a round trip time of 30 minutes). The household lacks access to basic-standard sanitation ("limited-standard" with an added criterion of the facility for the exclusive use of the household). The household has no access to electricity.
Health and nutrition		Any woman age 15–49 with a live birth in the last 36 months did not deliver at a health facility ^a Any child age 12–59 months did not receive DPT3 vaccination ^a Any child age 0–59 months is stunted (HAZ < -2) Any woman age 15–49 is undernourished (BMI < 18.5)
Security		The household has been subject to crime in the previous 12 months or lives in a community in which crime is prevalent. The household has been affected by a natural disaster (including flooding, drought, earthquake) in the previous 12 months.

Note: BMI < 18.5 = body mass index below 18.5 (underweight); DPT3 = diphtheria-pertussis-tetanus vaccine; HAZ < -2 = the height-for-age Z-score is below -2, that is, more than two standard deviations below the reference population mean. "Limited-standard" drinking water is drinking water that comes from an improved source (for example, piped, borehole, protected dug well, rainwater, or delivered water). "Limited-standard" sanitation means using improved sanitation facilities (for example, flush/pour flush to piped sewer system, septic tank, or a composting latrine).

a. If the indicator is not applicable, for example if the household includes no women who gave birth in the previous 36 months, the household is classified as deprived if the relevant deprivation rates in the subregion of residence are sufficiently high. Specifically, the deprivation threshold is set such that the share of individuals in nonapplicable households that are classified as deprived equals the national share of deprived individuals in applicable households who actually experienced a recent birth or have a child under age 6.

Source: World Bank, 2018: 93.

However, getting comparable data for a large group of countries poses several problems. For example, table 2 shows the number of countries for which the World Bank covers comparable multidimensional poverty indicators.

For three dimensions (income, plus two dimensions, education and access to basic services), in 2018, there was evidence for 119 countries. Considering health, nutrition, and security also, the number of countries drops to only six.

5. Which dimensions and indicators best assess multidimensional poverty? Different responses depending on the continent

Despite the limitations we have pointed out, various effective multidimensional tools are now used internationally and regionally to help monitor public policies aimed at reducing poverty.

5.1. The Global Multidimensional Poverty Index

One effort in multidimensional measurement is the Global Multidimensional Poverty Index developed by the United Nations Development Program (UNDP) and the OPHI. It measures multidimensional poverty in 110 countries (22 low-income countries, 85 middle-income countries and three high-income countries, representing 92 percent of the population in developing regions). It aims to track changes in development-related areas, acknowledging the inter-connection between them. The data covers the years 2,000 to the present.

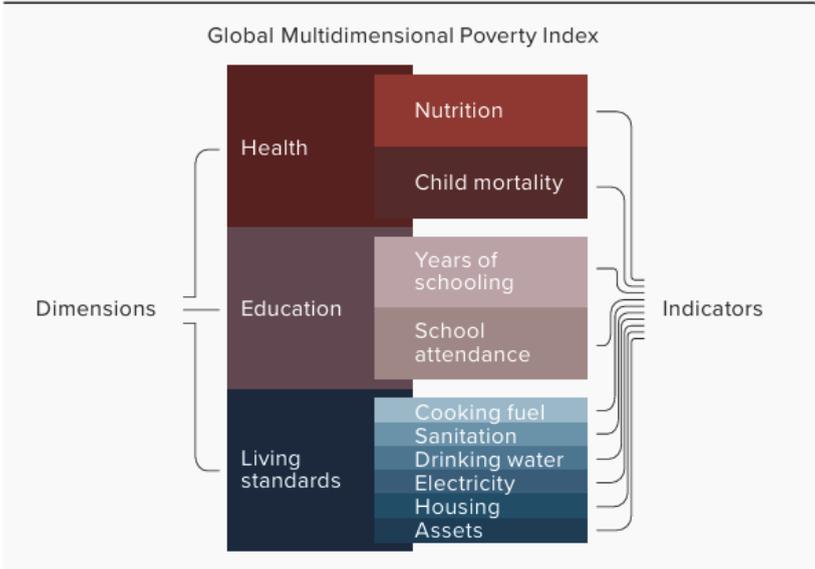


Fig. 1 - Structure of the global Multidimensional Poverty Index
Source: UNDP-OPHI, 2023: 4.

To measure the multidimensional poverty threshold, researchers generally establish that a person or household is deprived in at least a certain

number of indicators, and this generally occurs in more than one dimension (ECLAC, 2018). In the 110 countries that measure poverty, 1.1 billion of 6.1 billion people are multidimensionally poor. When comparing this indicator with that of monetary poverty, in most countries where the measurement is conducted (UNDP-OPHI, 2023), the global MPI shows that multidimensional poverty is considerably higher than extreme monetary poverty.

5.2. The Economic Commission for Latin America (ECLAC)’s index for multidimensional poverty

For its part, ECLAC has worked on a multidimensional poverty index adapted to the particularities of the region, which is comparable between countries and consistent with its institutional approach (ECLAC/UNICEF, 2010; ECLAC, 2014), with support from the OPHI and the UNDP. It uses the method of unsatisfied basic needs since the 1980s, based on the OPHI model. ECLAC recently defined a multidimensional poverty index with four dimensions, each composed of three indicators.

Although this is a significant step forward, it does not mean that there is a neat comparison between all countries in the region. For example, Mexico and Chile have had a fifth dimension since the 2010s, which includes networks and social cohesion, in recognition of the importance of social inclusion as a form of protection and problem solving in people’s lives (Comisión Experta, 2025). Another combination is the Mexican one: it refers to a population suffering deprivation simultaneously in monetary terms and in at least one of six social indicators that reflect fundamental social rights: education, access to health services, access to social security, access to basic residential services, housing conditions and access to food. It is unusual to combine income with other dimensions to get an overall multidimensional poverty index, but this is the approach chosen by Mexico.

Housing	Health	Education	Work and retirement
<ul style="list-style-type: none"> • Housing conditions (1/12) • Overcrowding (1/12) • Digital connectivity (1/12) 	<ul style="list-style-type: none"> • Water (1/12) • Sanitation (1/12) • Healthcare insurance (1/12) 	<ul style="list-style-type: none"> • School attendance (1/12) • Learning (1/12) • Illiteracy (1/12) 	<ul style="list-style-type: none"> • Employment (1/12) • Job quality (1/12) • Retirement (1/12)

Fig. 2 - Structure of the multidimensional poverty index for Latin America
 Source: ECLAC, 2025, p. 79.

5.3. The European Severe Material and Social Deprivation rate (SMSD)

An additional way of measuring poverty in the EU since the 2000s is the definition of who is experiencing Severe Material and Social Deprivation rate (SMSD) and who is At Risk of Poverty or social exclusion rate (AROP). At-risk-of-poverty rate (AROP) corresponds to the “sum of people who are either at risk of poverty – 60 percent of the national median equivalized disposable income after social transfers, or severely materially and socially deprived or living in a household with a very low work intensity”. Severe material and social deprivation rate (SMSD) is “the proportion of the population experiencing a lack of at least seven out of thirteen deprivation items (six related to the individual and seven related to the household), necessary to lead an adequate life” (Eurostat, 2024). The new dimensions that we have not seen in other indicators are, on the one hand, those related to leisure and autonomy (ability to afford a week’s annual holiday away from home; spend a small amount of money each week on oneself; regularly engage in leisure activities; meet friends or family for a drink or meal at least once a month), and, other dimensions of poverty (ability to keep the house adequately heated; have access to a car or van for personal use; replace worn-out furniture or clothing; have two pairs of shoes that fit properly; ability to afford a meal with meat, chicken, fish or vegetarian equivalent every other day).

SMSD is based on the EU Statistics on Income and Living Conditions (EU-SILC) data, and reflects the number of people who cannot afford a certain good, service or social activities (Eurostat, 2025). Considering leisure makes a difference in terms of standard of living, compared to multidimensional methods in Latin America. In 2023, the average SMSD for the EU reached 6.8 percent of the population, with significant variations between countries, ranging from a minimum of 2 percent for Slovenia to a maximum of 19.8 percent for Romania (Eurostat, 2024).

6. Old and new challenges

In recent years, not only because of the changes in context mentioned at the outset, a series of new challenges have also emerged for poverty measurements, both income-based and multidimensional.

6.1. More complex adjustments to the basic basket and prices

The ECLAC method to measure income poverty in Latin America faces growing challenges in determining which households' spending patterns set the poverty line. The reference population should be a group whose consumption habits are adequate to represent a standard of sufficiency, but in higher-income countries this method loses its accuracy. This approach relies on the relationship between poverty and calories, which has diminished. This is noticeable in the latest updates carried out by Mexico, Uruguay and Chile. In addition, several methods exist for estimating price changes (Comisión Experta, 2025). In recent years there has also been increasing availability of administrative data, which could replace survey questions.

6.2. How far should we go, including additional dimensions?

Second, regarding multidimensional poverty, we identified several challenges beyond data availability. Context is increasingly relevant for measuring poverty, but it is difficult to add more dimensions and indicators without compromising the Alkire and Foster method's clarity and transparency. At the same time, the MPI aims to identify new forms of poverty to guide public policy (UNDP-OPHI, 2023).

For this reason, research has considered factors like time poverty – which disproportionately affects women – and energy poverty – which varies across different regions globally (Comisión Experta, 2025). However, their inclusion poses a challenge for public policy in developing further measures to remedy them, in coordination with the others.

6.3. On the need to supplement vulnerability measurements

Third, it is necessary to move globally towards measuring vulnerability, considering that just above the poverty line, whether uni- or multidimensional, there is a large group of people whose situation remains precarious. Indeed, we should understand poverty as a state in which individuals may find themselves at a given point in time. People may be in poverty for a period because of crises they face, when other groups of people remain in poverty for longer periods. In that case, poverty is chronic or persistent. In terms of income, vulnerability is the probability of not reaching the minimum income level in the future. The duration of poverty is one of the important dimensions in this context (Chaudhuri *et al.*, 2002). From a life cycle per-

spective, there are times of greater vulnerability, such as childhood, transition from education to work, changes in employment status, divorce and old age (Biehl *et al.*, 2024).

One of the major problems is that to gain a thorough understanding of this phenomenon, it is necessary to follow the same people over time, which requires longitudinal data. A longitudinal survey is a type of study conducted over time to observe how certain variables change within the same group of people. This involves tracking the same individuals and surveying them regularly to find out how their living conditions change. It also requires sample retention, which involves greater technical complexity and cost. Few countries can conduct this kind of survey regularly (López-Calva and Ortiz-Juarez, 2014).

7. Conclusion

In terms of comparison, measuring monetary poverty is universal, but it does not reflect living conditions, access to public services or income differences within countries. The IPM provides a better picture of living conditions, but it is more complex to calculate and depends more heavily on data availability. Furthermore, the indicator must relate to applicable public policies measurable over time. In summary, we know that every indicator is imperfect (Atkinson, 2019). At this stage, as a single indicator cannot account for the complexity of the phenomenon, we must focus on making it a “useful, reliable and meaningful representation of a social condition or phenomenon” (Domínguez i Amorós, 2025). Indicators are forms of objectification of social phenomena oriented to action.

At the same time, exhaustiveness can be the enemy of effectiveness, since including all the dimensions of the phenomenon can make the indicator illegible or not very applicable over time. Indicators should reveal causes, not symptoms.

Finally, to face this technical and political discussion, it is also worth considering that there is no indicator free of values, since leaving dimensions in or out implies positions that are not only methodological. Any measure regarding poverty implies two last questions. Do we agree on the dimensions and expenses to be prioritized? And what is the plan of action implied by this indicator?

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5. The institutional production of inequality. Non-compliance and extractive institutions in local services provision

by *Vicente Espinoza*

1. Introduction¹

Social and political institutions are key elements for understanding the mechanisms of inequality. This chapter discusses the complexities of building inclusive institutions, considering the case of non-compliance among street level bureaucrats at the local level. The chapter examines how a distinct extractive institution, i.e. patron-client relationships², shapes the interaction between functionaries and users. In fact, local government functionaries do not apply rules mechanically, having a margin for discretionality, sometimes bending and even breaking the rules. The core argument states that a communicational mechanism that provides context to the user's demand triggers non-compliance among the functionaries.

Wellbeing and quality of life are either promoted or hindered by social and political institutions, which can be inclusive – fostering participation and prosperity – or extractive – concentrating power, monopolizing opportuni-

¹ This article was elaborate in the context of Projects Fondecyt 1251786, Fondecyt 1211099 and COES ANID/FONDAP/1523A0005, and also, it was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

² Patron-client relationship is the usual expression in English to describe an asymmetrical power relationship consisting of the exchange of political support from the voters by resources or services from the political patron. Latin American literature on the topic makes a distinction between patronage, on the one hand, which corresponds to a spoil system where the patron provides jobs to supporters, and clientelism on the other, where goods and services are exchanged for political support. In the chapter the expressions "patron-client relationship" and "clientelism" are used as equivalents.

ties, and perpetuating inequality – (Acemoglu and Robinson, 2012). This chapter analyses this dichotomy to understand the processes that engender inequity by focusing on patron-client relationship, a characteristic type of extractive institution.

Latin American societies suffer from high levels of socioeconomic inequality, largely due to the persistence of political institutions that concentrate power in elites while excluding citizens from the ability to make decisions regarding the distribution of public resources. At a macro-structural level, political asymmetry brings about extractive political systems, either captured by the elites or taking patrimonialistic forms (Crabtree and Durand, 2017; Mazzucca, 2017).

The chapter extends the institutional argument from the macro-historical level to local governance. At local levels, patron-client relationships are especially prominent in this regard, conditioning the access to public resources to loyalty to political leaders (Stokes, 2005; Auyero and Benzecry, 2017). These two levels are actually connected as long as local patronage networks are instrumental for the mobilization of electoral support (Auyero, 2001; Moriconi, 2011). Moreover, these institutions avert investment and economic development (Espinoza *et al.*, 2019). In summary, extractive institutions are inefficient for development (Acemoglu *et al.*, 2005), as well as functional to keep low-key political participation and decision-making systems inactive with regard to collective well-being (Shah and Thompson, 2004; vonHaldenwang, 2005).

Municipalities are part of the daily experience of the population in their relationship with the state and, for the most vulnerable, they are consequential for their very survival. Primary health care, sports and recreation, commercial licenses, including street vending, building permits, employment programs, women’s support programs, support for the elderly, neighborhood safety, among many other lines of action, are part of the functions that the municipality carries out for the well-being of the inhabitants of a commune. Most of these require contact between officials and the public because, for the population, having the resources for an initiative of interest is not automatic – for example, a senior citizens’ club outing – but involves an application or competition process where users and officials come into contact.

Despite their key role in the implementation of decentralized social policies, the population views them with mistrust. In the last two years, according to the CEP survey, around 75% of the population says they have little or no trust in municipalities. (CEP, 2025) With ups and downs, the level of distrust in municipalities has remained similar since 2011. Increasing their legitimacy, or the population’s trust in them, is key to improving the exercise of citizen’s rights as well as strengthening the political system. The chapter

discusses the effects of clientelism on the decline in the legitimacy of local governments, consisting of an informal political institution operating in favor of politically closed groups, which is recognized by users as a powerful factor influencing policy outcomes.

The research presented in this chapter analyzes the complexities of building inclusive institutions by focusing on non-compliance among street level bureaucrats at the local level, vis-a-vis extractive institutions, especially patron-client relationships. In fact, in their interaction with users, local government functionaries do not apply rules mechanically, altering them if they consider it adequate. Do users of local public services accord the same legitimacy to the exercise of discretionality, or rather they accept some forms of discretionality and discard other? Moreover, if they do so, which factors are associated with the acceptance of discretionality?

The core hypothesis states that a relational mechanism triggers non-compliance, by framing the interaction in terms that soften the resistance of the functionary and make the user reliable. In the research design, the user proposes a narrative that frames her demand in terms that justify relaxing the application of the norm under different criteria, among them clientelism. In the view of users and functionaries alike, the hypothesized mechanism actually triggers non-compliance, but users establish a moral divide between rule-breaking associated with clientelism and other cases.

The chapter begins with a conceptual discussion about the institutional approach to development and wellbeing, as well as its extension to the context of patron-client relationships and local governance. Next, the chapter presents the research design and the methodology, followed by the results. Finally, the discussion of the results presents some implications of the study for citizenship and public policy.

2. The effects of institutions on the population wellbeing

The institutional approach to disparities in economic development and population well-being proposes that institutions are the key variable determining the prosperity of societies. While this analysis often focuses on the nation-state, its principles are extended here to local levels of governance.

At the most general level, institutions consist of interactions within rule-structured situations that constrain or open choices regarding individual's actions or strategies. Recurrent patterns of behavior that characterize institutions express the certainty about the social environment and its functioning. Institutions, however, cannot be reduced to a set of rules because the individual, in pursuing the rule, engenders patterns of relationships that conform

the structural basis of the actual institutions (Giddens, 1984). In this view, individuals are not deprived of agency because their interaction creates new conditions for social action.

Institutional economics has linked institutions to economic development and wellbeing. North (1990), a key author in this regard, roots his argument on the structure of incentives defined by institutions i.e. information and benefits about transaction costs. According to this view, a set of rules, properly enforced, constrains wrongdoing and increases certainty for economic activity and exchange agreements. By contrast, weak institutions involve a scenario where rules are unknown or arbitrary, increasing the cost of any transaction by exposing partners to malfeasance, cheating or violence. Acemoglu and Robinson (2012) famously differentiated inclusive and extractive institutions, the implication being that even in formally democratic institutions, extractive institutions hinder economic development by restricting the access of social resources to minority groups or by appropriating the wealth created by society.

Even though institutional analyses focus on long-term economic growth at a macro-structural level, the argument can be extended to local levels. The positive effects of institution building at the national level for economic development have also local level effects on the wellbeing of the population. Local level institutions affect the distribution of opportunities in areas such as health care, economic entrepreneurship, and social mobility, many of them revolving around asymmetries of information.

3. Patron-client relationships as extractive institutions

In general, patron-client relationships refer to the exchange of political support from the client, for public resources, goods or services, from the patron. In contrast with political scientists who conceive clientelism as episodic vote-buying, anthropologists and sociologists study it as a social relationship between a political leader and its constituency, that is constantly renewed (Auyero, 2001). Clientelism is not an occasional commercial transaction but a social relationship, usually presented as horizontal, where exchanges occur as a component of a long-term connection (Luján, 2018). Users assume that their continuous support to a political authority entitles them to preferential access in public programs. Politicians meet users' expectations by providing this access, usually deferring or excluding the unloyal and the oppositional ones.

Patron-client relationships conform to an extractive institution (Acemoglu and Robinson, 2012) because the local elite consolidates and expands

its political power by establishing an asymmetric relationship with voters that receive benefits in exchange for their political support. As a consequence, privileges for well-connected clients substitute for citizen's rights, weakening political institutions and trust generally. Furthermore, they undermine equitable development and the population wellbeing.

Patron-client relationships are not to be conflated with downright corruption because the distortion in the channeling of public resources, at least in Chile, only exceptionally breaks formal regulations (Luna and Mardones, 2016). As such, it conforms an institutional framework that undermines the population wellbeing by bending the rules to the needs for political support from the political patron.

In Chile, patron-client relationships coexist with formal and to a large extent strong democratic institutions, mobilizing political support by means of enduring loyalties. They are, in part, a remnant of long-term paternalistic bonds and also new forms of paternalistic dependence ingrained in the functioning of the political system. The mechanism operates by providing the politically loyal with prompt access to resources from public programs. This practice need not be illegal, as long as the recipient of the resources is entitled to them. The practice, however, creates an exclusion as another part of the population will receive these resources with delay, the resources they receive are inappropriate, or they will receive no resource at all. Patron-client relationships go against the justice in the distribution of public resources, thus creating exclusion and eroding the legitimacy of the local government institutions.

The dichotomy between inclusive and extractive institutions requires some refinements in contexts where partial inclusivity coexists with extractive dynamics. In fact, patron-client relationships, during its operation, interplay with formal institutions and inclusiveness, sometimes complementing formal institutions (Helmke and Levitsky, 2004; Durston *et al.*, 2005). In this sense, as some authors argue, they are not totally opposed to democratic rule, because they coexist with democratic institutions and formal rules, even to correct or to adjust some of their malfunctioning. In the long run, however, the negative consequences of extractive institutions such as clientelism do not compensate for the good they can do to part of the population. Sound institutions cannot rely on particularistic practices that create dependency links among authorities and users as well as a functioning that engenders privileges and exclusion. In the long run, clientelism goes against the creation of public goods by its very relying on private loyalty.

Patron-client relationships undermine the institutional framework as they are not scattered events but a deeply embedded pattern that affects the population's wellbeing by replacing inclusive impersonal neutral rules with

private extractive deals. Extractive practices and institutions, usually informal yet effective, enjoy an ambiguous status. Political authorities aim to secure resources by providing short-term satisfaction to the needs of well-defined group of voters. The trade-off between the private interest of voter's satisfaction and the public interest of institution-building hinders the efficacy of local government. Patron-client relationships, because of their particularistic character prevent the implementation of large encompassing projects, weakening the oversight role of government and in the end, the building of neutral institutions (dellaPorta, 1995; Ordoñez, 2024). Clients may receive immediate benefits (e.g., cash, favors), but these are unsustainable and discourage investment in public goods like education or infrastructure. Focusing public resources on small groups also goes against investment in large projects, because the expected outcome of clientelism is not the creation of public goods, but to provide a short-term relief to the politically loyal.

Furthermore, clientelistic rewards erode the capacity of communities for collective action. The hierarchical character of patron-client relationships hinders the ability to find collective solutions by means of deliberation; the rules that organize community life depend on the patron and will not necessarily be established in the pursuit of the common good. In this context, trust and reciprocity are permanently hampered by loyalty and suspicion.

This chapter shows that patron-client relationships are an active component of local politics and, far from a picturesque left-over of old times actualizes itself by adapting its functioning to current regulations. Nor do they make part of a traditional political culture, where common values define the way of "getting things done". Institutional rules, written or unwritten, need not shared values to organize behavior. The rules that organize extractive practices such as clientelism can be in contraposition to culture and even morality, as they can be unfair and even dishonest. Having rules that go against the grain, indeed, require some form of cultural or moral attenuation for its operation, but this cannot be conflated with common values or moral distinctions (Granovetter, 2007).

4. Flexibility and bad practices. A study on extractive institutions and non-compliance

The relationship between users of public programs and the officials in charge of them presents an interesting case for studying patron-client relationships. Most people understand that relationships between users and officials are governed not only by laws and regulations but also by unwritten codes that allow rules to be circumvented when excessive adherence to

formality would lead to an absurd, unfair, or undesirable situation. In fact, public officials who are in contact with users, such as social workers, teachers, police officers, and counter clerks, among others, have a margin of discretion that is considered part of their job performance (Lipsky, 2010). The problem begins when such discretion involves bending or even breaking a rule. What are the reasons that lead users to expect an official to deviate from the norm? Are they the same reasons that lead the official to do so? Can the behavior be justified, or is a practice outside the norm never acceptable?

Local government functionaries have an active relationship with the rules that define the scope of their authority and do not apply them mechanically. Their willingness to bend the rules can be triggered in part by considerations of social justice, channelling public resources to those in need, even if they are not strictly entitled. The mechanism underlying non-compliance consists of an interactive definition of the situation involving the officer and the user. The study refers to the perception of users of local services regarding the likelihood of non-compliance among the functionaries.

People adopt or do not adopt these behaviors for a number of reasons, broad and varied and widely discussed in the specialized literature (Granovetter, 2007; Dubois, 2016; Meza and Zizumbo-Colunga, 2020). The article focuses on one part of the answer, referring to the extent to which circumstances condition individual behavior. Circumstances are understood as a dynamic social construct and not an immutable structure or system that compels individuals to act the way they do. The central idea is that interaction between individuals constructs a definition of the situation in which they find themselves, which operates as a framework within which they make their decisions. The most relevant aspect is that circumstances or structure of the system of action are defined by interaction and not externally.

The central idea here is that citizens justify breaking some rules when the reasons are adequate. Users, by making their requests, create a communicational framing for their cases. Accordingly, the definition of the situation implicit or explicit in the request influences the perception of the possible courses of action and the choice of the functionary (Goffman, 1974). If this is the case, service users would use flexible criteria, distinguishing certain situations in which the application of the rule can sometimes be relaxed without this being seen as corrupt or unfair.

5. Methodology

Between July and August 2024, 1,223 people over the age of 18 from across the country, who were users of municipal services to varying degrees,

participated in an experiment to test the probability, honesty, and fairness of breaking a rule³. The study consisted of an experimental methodology known as a “factorial survey” or “vignette survey,” in which participants are presented with a situation, described in a box or “vignette,” which varied among participants (Wallander, 2009). Only people who had carried out at least one procedure at the municipality participated in the study. After reading the vignette, participants evaluated three aspects associated with accepting a request that involved breaking a rule: the likelihood that the official would grant the request, the honesty of granting the request, and the fairness of granting the request. Of course, in real life these interactions are much less schematic, and the vignettes only seek to make the framing that underpins the request seem plausible⁴.

The vignette in this survey described the interaction between a municipal official and an elderly woman who was requesting permission to set up a small street stall. The official’s response was that she did not have all the necessary documentation, so he could not grant her the permit. The user, however, insisted in four ways: by reiterating her request, pointing out her family’s financial need, appealing to the official’s flexibility, and finally, pointing out that she had worked on the mayor’s electoral campaign. In addition to the survey, the vignettes were used in five subsequent discussion groups with 24 municipal officials who dealt with the public, thus enriching the analysis with a qualitative dimension provided by the evaluation of the same situation from the other side of the desk.

The study allows to determine, first, whether users believe there are arguments that could lead officials to “make an exception” and, second, whether in such cases the decision is considered honest and fair⁵. More generally, it establishes whether users consider any flexibility in the application of the rule to be equally reprehensible or whether there are cases in which it is justifiable. In addition, the views and experience of officials help to clarify the extent to which their experience converges with the users’ diagnosis.

³ The study took place between July and August 2024. To simplify the reading, participants in the study are referred to as “users”; more precisely, they were survey respondents selected because they had used municipal services during the year prior to the study.

⁴ In the context of the survey design, “cognitive interviews” were conducted with users of municipal services, who explained how they understood what they were asked, why they answered the way they did, and what information they based their answers on.

⁵ The study uses honesty as the opposite of corruption, a distinction validated in cognitive interviews. There is an association between corruption and dishonesty with justice, since the extractive nature of corruption involves injustice. Despite this association, they should not be considered synonymous because honest decisions can be unjust. In the vignette, if the official does not grant the requested permission, this could be seen as unjust, even though he is acting in accordance with the law.

Clarifying these points is highly relevant for improving local political institutions and the effectiveness of the instruments used to reduce “bad practices.”

6. Results

Table 1 and Table 2 show the means of the explanatory factors for the aspects evaluated by the respondents. This presentation shows in a simplified way the effects analyzed with formal statistical models, on which the references to the significance of the results are based. Table 1 shows the means according to the arguments used by the user when insisting on her request. Insistence without argument serves as a baseline, and the strength and direction of the effects can be seen by the deviation of the means from this reference. The second table shows the means according to the type of official. The contrast between a career official and an official recently appointed by the mayor seeks to capture the effect of political operators.

Tab. 1 - Mean agreement on probability, fairness and honesty of the functionary accepting the user's demand, given the argument

<i>Argument used to insist</i>	<i>Probability</i>	<i>Fairness</i>	<i>Honesty</i>
Only insists	3.3	3.4	3.1
Highlights her financial need	3.9	4.0	3.4
Asks the official for flexibility	4.4	4.2	3.8
Highlights her closeness to the mayor	4.3	3.1	2.8

Source: Elaboration by the author with data from the experimental study.

Table 1 shows significant effects of the user's narratives in all aspects considered, with variations in their strength and direction. The probability that the official will grant the request increases with any argument, compared to simple insistence, especially those that appeal to the official's flexibility and clientelism. With regard to the fairness and honesty of granting the user's request, there is a contrast between the clientelist argument and the rest. Granting the request for reasons of flexibility or economic need is above the control category, indicating that it is considered fair and honest. In contrast, the clientelistic argument falls below the control category, indicating that decisions based on this criterion are considered unfair and corrupt.

Tab. 2 - Mean agreement on probability, fairness and honesty of the functionary accepting the user's demand, given seniority

<i>Seniority of civil servant</i>	<i>Probability</i>	<i>Fairness</i>	<i>Honesty</i>
Senior civil servant	3.7	3.5	3.1
Newly appointed	4.2	3.6	3.2

Source: Elaboration by the author with data from the experimental study.

The effect of the type of official is not statistically significant, even though users believe that newer officials are more likely to grant the request. The statistical analysis tested the interaction between the type of official and the argument, which also proved insignificant.

Table 2 shows no significant differences based on the type of official, i.e., whether they are career officials or were appointed by the mayor. The study design assumed that users would expect different reactions from newer officials compared to older or career officials. This aspect proved to be of little relevance in the explanation users give for breaking the rule. Interviews with local civil servants helped to clarify why seniority does not change their behavior.

Once appointed, political loyalty does not drive the subsequent behavior of functionaries because they are interested in pursuing their professional career, so they avoid actions that jeopardize that prospect. Functionaries acknowledged that they had used political resources, contacts, and loyalty to get their positions, understanding this as a competitive advantage during the recruitment process. Even though mayors might use their political influence to have a close affiliate appointed, they had no power to make the functionaries follow an undue course of action. Functionaries, however, were careful to keep their loyalty out of doubt accepting some demands from the political authority, but they would not engage in unlawful behavior on account of that loyalty.

7. Discussion: Narratives that trigger the relaxation of the rule

The mechanism in operation that relaxes the application of the rule corresponds to a “communicational framing” of the request, which occurs during the interaction between officials and users (Goffman, 1974). The situation is familiar to users and officials. In it, the arguments put forward by a user, together with the responses of the official, establish a shared definition of the situation, which becomes the basis for the administrative decision. The

official has the authority to apply the rule with a certain degree of discretion, without resorting to arbitrariness or favoritism. In addition, they know that users may try to manipulate or even deceive them. The user hopes that their reasons will allow the official to exercise a margin of discretion or make an exception and, therefore, will seek to define the situation in a way that makes it natural to accept their request. The margin of discretion, therefore, is impossible to regulate in detail, which requires the person exercising authority to determine whether this margin can be extended to the situation at hand.

The main finding of the study is that, for users, any additional argument offered by the user to insist on her request improves the likelihood of a favorable response. Therefore, the mechanism hypothesized in the study makes sense for users of municipal services. This reflects that the relationship between neighbors and officials is far from being seen as an impersonal link, but rather that both actively intervene in the outcome of the process.

Participants in the study rank the probability that the civil servant will “make an exception” and grant the user’s request. Of the three, the weakest argument is the user’s financial need. The civil servant’s demand for flexibility carries more weight. However, in the users’ view, the greater likelihood of the civil servant granting the request is associated with clientelism. In other words, while recognizing that there are other factors that may lead to a more relaxed application of the rule, the main reason for this would be the privilege granted to those close to the mayor.

The users who participated in the study also assessed whether granting the request in these cases was honest or fair. The results show a clear contrast: on the one hand, the economic need of the family or the flexibility of the official in the face of an unforeseen event, when granting a request, is not associated with corruption or injustice. In contrast, users of municipal services associate patronage with corruption and injustice, as it dishonestly favors a few.

In short, the interaction between users and officials can change the outcome of a request, depending on whether the user provides a context for the request that is acceptable to the official. However, not just any reason is valid. In particular, patronage can increase the probability of a favorable outcome for the user, but this is considered dishonest and unfair. In other words, users do not view all situations as equal and, rather than seeking rigidly regulated procedures, they prefer flexibility associated with reasons of fairness and honesty.

The results are statistically significant and robust enough to hold up after various statistical controls⁶. The reaction to the vignette reflects users’ per-

⁶ The model consists of an ordered logistic regression using the factors in the vignette as explanatory variables, with controls for sociodemographic effects, political position, understanding of the question and alternative explanations for noncompliance.

ceptions, regardless of age, gender, education, or region of residence, as well as political orientations and support for democracy. Certainly, sociodemographic factors and political orientations have effects on the perception of rule-breaking, but they do not override the discursive mechanism that the experiment tested.

8. Implications of the results

Unlike opinion polls, experiments do not seek to generalize results to the entire population, but rather to identify the mechanisms through which a certain result is produced, in this case, the violation of a rule. However, since the survey was applied in several municipalities, it reflects to some extent the general perception of how municipalities function. Statistical tests suggest that it would be possible to extend the results to the population that has used municipal services, with some accuracy. Below are some generalizations based on the evidence of external validity of the results.

There are legitimate reasons for not following a rule: flexibility on the part of civil servants in justified cases and the economic needs of the user. When these arguments arise, the increased likelihood of an exception being made is associated with perceptions of honesty and fairness. In contrast, clientelism, although it increases the likelihood that rules will not be followed, does not justify it, as it is considered the most dishonest and least fair reason for doing so.

The association between service provision and clientelism is the main factor that undermines the legitimacy of municipalities. Users do not consider it dishonest for a civil servant to be flexible in applying the rules if it leads to greater justice. What they do not accept is that such flexibility should be accompanied by favoritism toward politically loyal individuals. In the view of users, labeling clientelistic practices as dishonest establishes a gradient that leads to corruption.

The challenge for restoring the legitimacy of local services is therefore to establish consensual and effective rules for access to and distribution of resources, rules whose application leaves no doubt that they are fair. These are initiatives within the reach of the authorities, such as having a single system for booking appointments in health services that is known to users and leaves no doubt as to its transparency.

The study shows that in the modernization and improvement of the quality of public services, the weak point is not the officials, but the absence of institutions that channel the delivery of services. Under such conditions, civil servants must act to compensate for the absence of clear rules. The multitude of controls and productivity targets applied to civil servants have little effect

on the legitimacy of municipalities, which continue to be seen as a world where having the right connections is more valuable than a guarantee of the right to fair and efficient services.

9. Conclusions: Need to build institutions

Participants identify two valid reasons for neglecting a rule: flexibility and necessity. Clientelism, while increasing the probability that the rules will not be respected, does not justify it because it is considered the most dishonest and least fair practice. Officials are not the factor that detracts from the legitimacy of municipalities, but the association between the provision of services and clientelism, whose origin the participants lie in their highest authority. Users do not consider it dishonest for an official to be flexible in the application of the rule if it leads to greater justice. What they do not accept is flexibility driven by favoritism to the politically loyal. The qualification of dishonest for clientelistic practices establishes, in the vision of the participants, a gradient that leads to corruption. This is not the case in the other instances, where the flexibility or empathy of the official is considered part of the legitimate exercise of his or her powers.

The logic of obtaining votes in exchange for public resources that are handed out as favors permeates the operation of most municipalities, even against the will of officials, who do not agree to requests that are outside the norm. It operates within the frameworks imposed by legal regulations and program rules through allocations that favor some and exclude others. Users are not wrong when they attribute influence on municipal decisions. The problem, then, is not that municipal officials act as political operators, but that the authority imposes this logic on the functioning of services. Proposals for decentralization and local government must take into account that improving the legitimacy of political institutions requires that they operate on the basis of clear rules and inclusive principles, where official discretion is at the service of justice.

The challenge to recover the legitimacy of local services is therefore to establish consensual and effective rules for access to and distribution of resources; rules whose application leaves no doubt that they are even. These are initiatives within the reach of the authorities, one of the interviewees in the Metropolitan Region highlighted the change made by having a single system to book hours of care in health services that is known by users, compared to the multitude and arbitrariness of the channels that operated previously. In one of the interviews, a participant provided a straightforward explanation of what having good institutions means: “regardless of the channel

used to make a demand, the outcome should be approximately the same”. This rule of thumb about the processing of demands implies that privileged treatment must be ruled out.

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Part II
Labour, Wages, and Regulation:
Old Challenges, New Risks

6. The minimum wage as a political impetus in the face of distributive inequality processes

by *Eduardo Chávez Molina*

1. The legitimacy of inequality¹

The legitimacy of social inequality has been historically constructed and sustained through discursive, institutional and symbolic mechanisms that naturalize hierarchies and justify socioeconomic differences. As Bourdieu (1998) points out in his analysis of symbolic domination, where he states that “domination is not only exercised through physical coercion, but also through the imposition of categories of thought that make power relations seem natural and inevitable” (Bourdieu, 1998).

This process of legitimation has manifested itself in various forms throughout history, from the religious and philosophical justifications of feudal societies to the meritocratic narratives of modern capitalist societies, which tend to hide the structures of privilege and exclusion behind the rhetoric of individual effort and social mobility.

According to Dubet (2015), the legitimacy of inequality is questioned in modern societies where the principle of equality predominates. Faced with the hypocrisy of meritocratic societies, Dubet argues that inequality is justified by a “program of double standards” (Dubet, 2015, p. 73). In this, actors develop cognitive mechanisms to accept the structural inequalities from which they benefit, while publicly adhering to egalitarian values. This tension between the meritocratic ideal and the reality of injustice constitutes a fundamental source of social suffering in the contemporary individual.

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union’s Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

2. Equality

In the face of this naturalization of inequality, the struggle for equality has emerged as a political and social project that seeks to dismantle these oppressive structures and vindicate the dignity and rights of marginalized groups.

Fraser (2008) proposes a multidimensional approach to social justice that combines economic redistribution, cultural recognition and political representation, arguing that «justice in the 21st century requires addressing both material inequalities and symbolic injustices, as well as ensuring the equal participation of all in decision-making processes» (Fraser, 2008, p. 23).

This approach is particularly relevant in contexts of growing inequality and exclusion, where neoliberal policies have exacerbated socioeconomic gaps and eroded social protection mechanisms, as documented by Piketty (2014) in his analysis of the concentration of wealth and capital in the 21st century.

In Latin America, the struggle for equality has been marked by the tension between processes of modernization and persistent structures of exclusion, as Filgueira (2007) points out in analyzing the paradox of social mobility in the region, where «economic growth and the expansion of educational opportunities have coexisted with the persistence of hard cores of poverty and inequality» (Filgueira, 2007).

This contradiction has led to rethinking the theoretical and political frameworks from which inequality is addressed, incorporating intersectional perspectives that consider the dimensions of class, gender, race and ethnicity, as proposed by Crenshaw (1989) or Angela Davis (2019) in her analysis of intersectionality as a tool for understanding the multiple forms of oppression faced by groups.

In this context, the struggle for equality involves not only the redistribution of economic resources, but also the transformation of the symbolic and cultural structures that perpetuate exclusion and discrimination.

As Sen (1999) argues, «equality cannot be reduced to mere equality of income, but must be understood in terms of real capabilities and opportunities for people to live lives that they value and have reason to value».

This broad approach to equality requires, therefore, a profound critique of the narratives that legitimize inequality and a commitment to building more inclusive and democratic societies, where social justice is not an abstract ideal, but a concrete reality for all.

Consequently, state government has historically faced a fundamental tension: it can choose to let market forces guide social organization and the distribution of resources, or it can actively mediate through regulation. The

objective of the latter would be twofold: to improve the distribution of wealth in order to protect the most vulnerable and to promote the improvement of living standards for the entire population.

3. The importance of the minimum wage

And in this sense, an institutional tool with profound egalitarian force is the regulation of minimum wages and with it the improvement of living conditions, which in light of the capacity of verification and current data, goes against the grain of the neo-classical hypotheses on intervention in employment, and its potential negative effect.

If we look at the international experience, Spain has undoubtedly produced a truly empirical and instructive experience in terms of existing theories.

The debate on the increase of the Minimum Interprofessional Wage (SMI) has gained global relevance, and evidence in various countries suggests that, in general, its positive effects have outweighed the negative ones. The case of Spain is paradigmatic: since 2018, the SMI has experienced a remarkable rise of 61%, standing at €1,184 gross per month in fourteen payments. This policy has served as an effective tool to combat wage inequality and has helped to sustain contained unemployment rates, currently standing at 60% of the national average wage. Despite warnings from some business and economic sectors, which predicted job destruction and inflationary pressures, these negative scenarios have not materialized, reinforcing the arguments in favor of its suitability.

This increase, which is forty points higher than the rise in prices over the same period, has strengthened the purchasing power of the lowest paid workers. This boost has been key to reducing wage inequality and improving their economic well-being. Despite the observations of some analysts regarding a moderation in job creation, the consensus prevails that the benefits of these increases have outweighed the detriments. This result contradicts orthodox economic postulates that anticipated a clearly detrimental effect on the labor market.

This phenomenon is not exclusive to Spain. Countries such as Mexico, the United States (especially California) and several Eastern European nations have also increased their minimum wages, with generally favorable results. In Germany, for example, the introduction of the minimum wage a decade ago has not had a significant impact on employment, according to recent studies. Similarly, in the United States, minimum wage hikes have improved workers' incomes without generating inflation or job destruction, as shown by expert research such as (Dube, Lester and Reich, 2016).

Empirical evidence, supported by the Nobel Prize in Economics awarded to David Card in 2021, has challenged neoclassical theories that predicted negative employment effects from minimum wage increases. The study (Card and Krueger, 1994) evaluates the impact of the 1992 increase in the minimum wage in New Jersey from \$4.25 to \$5.05 per hour on employment. Using a difference-in-differences methodology, the authors compared employment growth in 410 fast-food restaurants in New Jersey and eastern Pennsylvania before and after the increase.

Contrary to the prediction of conventional economic theory that employment would fall, the research found that there is no indication that raising the minimum wage reduced employment; in fact, employment increased in New Jersey relative to Pennsylvania. In addition, the study examined whether firms offset costs through non-wage benefits or flatter wage profiles, and found mixed evidence that costs were passed on to consumers through higher meal prices.

Studies show that, at moderate levels, these increases not only do not harm employment, but also reduce wage inequality and stimulate consumption, benefiting the economy as a whole. However, experts warn that there is a limit beyond which increases could have adverse effects, so it is crucial to maintain a balance and continue to evaluate the impacts of these policies.

In summary, the increase in the minimum wage in Spain and other countries has proven to be an effective tool for improving the conditions of lower-income workers, reducing inequality and stimulating the economy, dismantling entrenched economic myths and opening up a new paradigm in wage policy.

Its freezing, which is practically its concealment as a policy, shows its profoundly negative effect as in the Argentine case.

The graph analyzes the relationship between inflation, minimum wage increases and the resulting gaps in five countries: Spain, Germany, the Netherlands, France and Argentina. These figures show how wage policies deal with inflationary challenges and how this impacts workers' purchasing power.

In Spain, inflation was 19%, but the minimum wage experienced a significant increase of 61%, resulting in a positive gap of 42 points. This case demonstrates a significant protection of workers' purchasing power. On the other hand, in Germany, although inflation was higher (24%), the 43% wage increase allowed a positive gap of 19 points, showing a good responsiveness to rising prices.

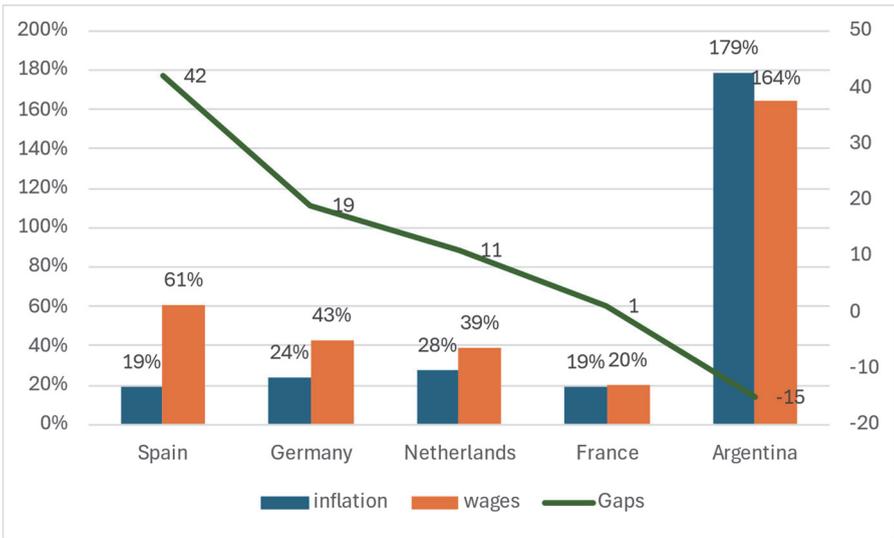


Fig. 1 - Inflation, minimum wages, and gaps

Source: Europe: Eurostat. Argentina INDEC, 2018-2024.

The Netherlands, with 28% inflation, had a lower positive gap of 11 points, as wages increased by 39%. Although less remarkable compared to other countries, it is still an example of how wage measures can mitigate inflation. France, with 19% inflation and a 20% wage increase, had virtually a zero gap (1 point), reflecting a wage adjustment that was very closely aligned with inflationary levels. The most significant case is Argentina, where year-on-year inflation reached 179%. Although the minimum wage experienced a nominal increase of 164%, this increase was insufficient to compensate for the soaring prices, generating a negative gap of 15 percentage points between the two indicators. This situation evidences the extreme difficulty of preserving the purchasing power of the population in a context of high inflation. Moreover, it illustrates a recurrent phenomenon: even when moderate and low inflation follows a high peak, real wages show a “downward inertia” and fail to recover their pre-crisis level, deepening the economic deterioration of households.

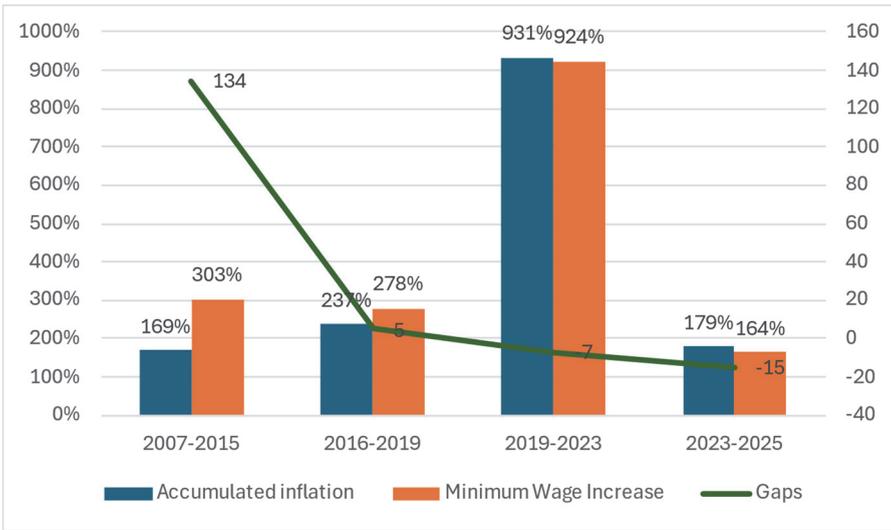


Fig. 2 - Inflation and minimum wage in Argentina

Source: Data Argentina, Minimum Living and Mobile Wage and INDEC 2024.

The graph analyzes the main economic indicators in Argentina under different leaderships: Milei administration (2023-2025), Fernandez administration (2019-2023), Macri administration (2015-2019) and Kirchner administration (2007-2015). Each of them represents a unique approach to inflationary challenges, reflected in inflation levels, minimum wage increases and the resulting economic gaps.

Javier Milei shows a scenario with relatively low levels of inflation and wage increases. The gaps, although positive, are modest, indicating an almost balanced equilibrium between inflation and minimum wage. In contrast, under the leadership of Alberto Fernandez, inflation levels reach extraordinarily high figures, close to 900%, accompanied by a proportional increase in the minimum wage. However, the economic gap, although positive, points to an evident mismatch between both factors.

On the other hand, Mauricio Macri presents moderate figures, with inflation and wage increases around 200%. The gaps in this period are relatively stable, at around 60 points, which suggests an effort to maintain a balance between the indicators. Finally, Cristina Fernández de Kirchner stands out for having the highest gaps, reaching 120 points. Although inflation and wage increases are intermediate, this result reflects a strategy that, at least apparently, managed to overcome the impact of inflation on minimum wages.

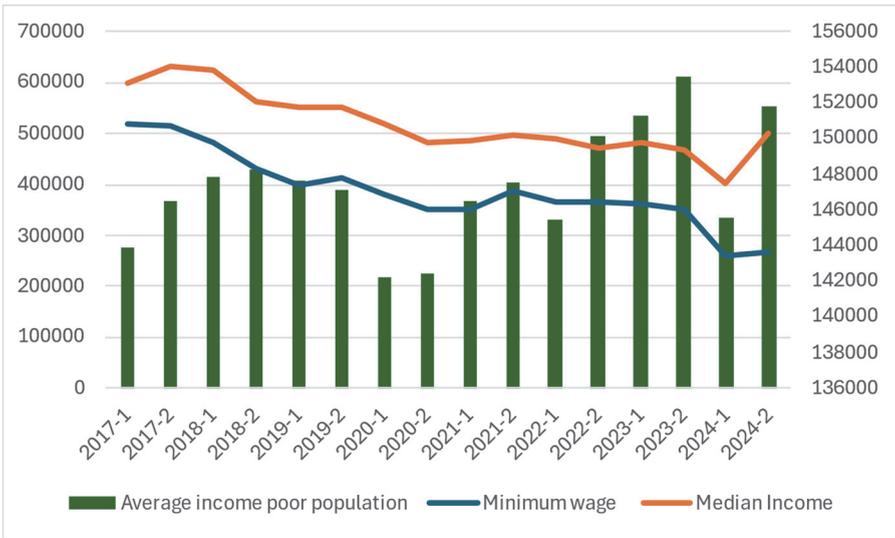


Fig. 3 - Minimum Wage, Average per capita income, Average per capita income of population below the Poverty Line

Note: Argentine pesos at constant prices 2024.

Source: own elaboration, EPH-INDEC 2017-2024.

The chart examines three economic indicators in Argentina: real minimum wage, average per capita income and average per capita income of the population below the poverty line, between 2017 and 2024.

During this period, the real minimum wage fell steadily, evidencing a loss of purchasing power in real terms. Average per capita income fluctuates, but maintains a general downward trend, reflecting a possible weakening of purchasing power in the general population. In contrast, the average per capita income of the population below the poverty line remains relatively stable over time. This could indicate that the most vulnerable sectors have seen smaller changes in their average income, although this could be due to various social policies or to the stabilization of incomes at low levels.

In summary, the graph highlights a worrisome downward trend in the real incomes of people outside the most vulnerable population, while the incomes of the latter remain practically constant.

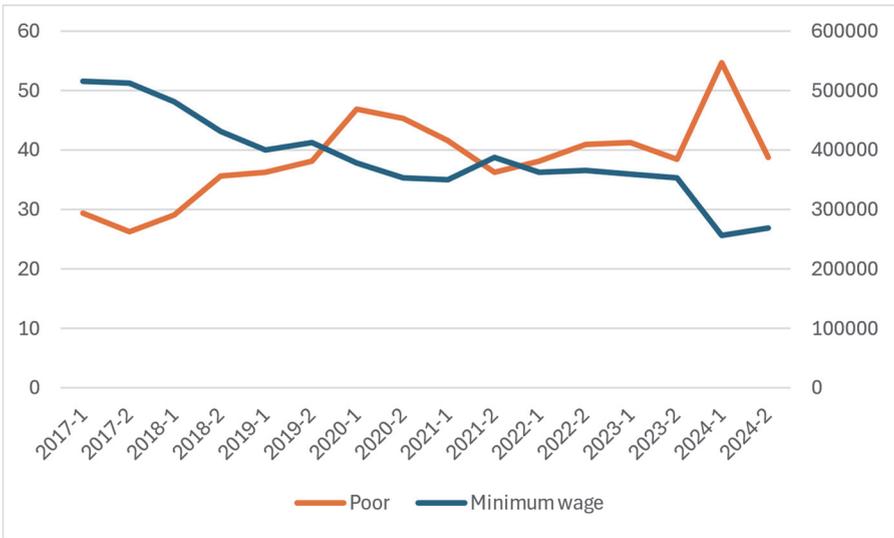


Fig. 4 - Minimum Wage and Population below Poverty Line

Note: Argentine pesos at constant prices 2024.

Source: own elaboration, EPH-INDEC 2017-2024.

It shows us a scenario over the last few years, from 2017 to 2024, in which two stories intertwine to tell us the economic pulse of society. The orange line represents the real minimum wage, a measure of the basic income that, ideally, should allow people to cover their fundamental needs. This axis, which extends to 600,000, is the thermometer that tells us how much money, in inflation-adjusted terms, reaches the poorest households. Every move in this line is a reflection of the policies, adjustments and, at times, limitations the economy faces in trying to protect workers' purchasing power.

On the other hand, the blue line, which fluctuates in a range up to 60 on the right axis, shows the other side of the coin: the proportion of the population living below the poverty line. At each point of this curve is inscribed the stark reality of those who, despite any policy implemented, are immersed in situations of vulnerability. This line is an echo of how economic decisions directly affect the quality of life of families, showing how small changes in the minimum wage can have major repercussions on the stability of a population.

Throughout this period, we see how the evolution of the real minimum wage and the poverty rate tell a story of interdependence. When the orange line stops or recedes, there is often a trend in the blue line that could be interpreted as an increase in the number of people in poverty. Each decline in minimum income is much more than a number: it is a testament to weakened purchasing power that impacts the ability of thousands of people to get by.

This graphic narrative not only presents us with figures but also allows us to reflect on the value and urgency of promoting effective economic policies. The struggle to improve the real minimum wage is, in short, a bid to transform lives, to reduce the gap and to offer the population the possibility of breaking the cycle of poverty. In this sense, each point drawn on the graph is a call to action: to rethink, to innovate and to commit ourselves to solutions that truly promote the well-being of society.

4. Conclusion

This article analyzes social inequality and wage regulation as a tool for social justice through four conceptual phases:

First, inequality is presented as a historically constructed phenomenon through discursive, institutional and symbolic mechanisms that naturalize hierarchies. According to Dubet (2015), meritocratic societies operate with a “double standard program” where structural privileges are accepted while publicly professing adherence to egalitarian values. Domination is exercised through the imposition of categories of thought that make power relations seem natural.

In the second place, a multidimensional political project emerges in the face of this construction. Fraser (2008) proposes combining economic redistribution, cultural recognition and political representation. This vision is enriched by intersectional perspectives (Crenshaw, 1989; Davis, 2019) that consider the intertwined dimensions of class, gender, race and ethnicity. Equality is conceived not as mere income equality but as expansion of capabilities and real opportunities (Sen, 1999).

Third, minimum wage setting is presented as an institutional tool with egalitarian force. The evidence disproves neoclassical hypotheses about negative employment effects. Card and Krueger’s (1994) seminal study - endorsed by Card’s Nobel Prize in 2021 - showed that moderate increases in the minimum wage do not reduce employment and can stimulate consumption. Spain exemplifies this success with a 61% increase in the SMI since 2018, resulting in a positive gap of 42 points versus inflation and improving purchasing power without generating unemployment.

Finally, the wage “freeze” shows profoundly negative effects, illustrated by the Argentine case. There, a nominal increase of 164% was insufficient in the face of 179% inflation, generating a negative gap of 15 points and a steady fall in real wages between 2017-2024. This loss of purchasing power correlates with increased poverty, demonstrating how regulatory insufficiency perpetuates cycles of inequality and makes it difficult to break poverty.

Active minimum wage regulation is a crucial instrument for transforming lives and reducing structural gaps, while inaction deepens inequality and violates basic rights.

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7. Artificial Intelligence and Labor Regulation. Regulating the risks

by *Victoria Matozo, Pablo Molina Derteano*

1. Introduction¹

This paper analyzes and compares European and Latin American legislation concerning the application of Artificial Intelligence (AI) in the labor sphere. Although the implications of AI and its contribution to the reinforcement of global inequality networks have been extensively discussed, this study concentrates specifically on its impacts for employment. These impacts may be broadly classified into two principal dimensions: (1) the potential of generative AI to displace existing occupations, and (2) the emergence of novel forms of labor exploitation and surveillance arising from asymmetrical and non-beneficial interactions between workers and generative AI systems.

In addressing these challenges, we advance a roadmap that transcends fragmented sectoral measures and emphasizes the establishment of comprehensive regulatory frameworks. The purpose is to articulate the dual crises affecting employment in relation to both current and proposed legislative responses. To this end, the analysis draws upon a corpus of existing regulations, which serve as reference points for identifying the nature of AI's impact on labor and for delineating the requisite preventive and corrective measures.

¹ This chapter was elaborated in the context of the INCASII2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

2. Theoretical considerations

There is a substantial and growing body of comparative literature that examines the impact of Artificial Intelligence (AI) not only on employment but also on broader dimensions of social life. A central conceptual distinction within this field is drawn between Artificial Intelligence in general and Generative Artificial Intelligence (GenAI). IA encompasses a wide array of technologies designed to replicate specific cognitive functions, such as pattern recognition and natural language processing. These systems are typically deployed in domains involving virtual assistance, data analytics, and task automation. GenAI, in contrast, constitutes a specialized subfield of AI focused on the autonomous creation of novel content -such as textual narratives, images, musical compositions, and computer code-. It relies on advanced machine learning models capable of generating original outputs by extrapolating from large datasets. Prominent examples include generative image models and conversational agents capable of producing coherent and stylistically varied texts. While conventional AI systems are primarily oriented toward data analysis and predictive tasks, GenAI extends the technological frontier by engaging in the production of original and often creative material (Goodfellow *et al.*, 2016; Cheng *et al.*, 2021). This technical and conceptual shift has facilitated the widespread popularization of recreational applications of GenAI, which in turn has reinforced hegemonic discourses positioning human labor – and even human creativity and emotional expressiveness – as potentially substitutable by artificial systems. Such narratives challenge longstanding assumptions about the uniqueness of human capacities and suggest a reconfiguration of the boundaries between human and machine agency (Coriat, 1991; Han *et al.*, 2020)².

These recursive extrapolations, while endowed with intrinsic aesthetic appeal (Reynolds, 2010), simultaneously propagate the perception that generative AI will eventually be capable of substituting virtually all forms of human labor and activity. A significant strand of the academic literature does not refute this projection; on the contrary, it frames it as a manifestation — indeed, an acceleration — of a structural dynamic intrinsic to capitalist modes of production: the persistent drive to replace living labor (variable capital) with technological apparatuses (fixed capital) as a means of maximizing productivity and reducing labor costs (Coriat, *op. cit.*; Han *et al.*, *op.*

² Cave and Dihal (2019) contend that the circulation of generative AI creations as if they were Hollywood productions — such as adding a singer’s voice to a band that never had and could never have had it, or reimagining a 1999 film in the style of the 1950s — carries the implicit message that any worker could be replaced by generative AI and by robotic or other technological extensions.

cit.). Some scholars advocate for a shift in focus away from broad categories, such as robotisation, digitalisation and online platforms and the general occupational impact of technological progress and automation, to a «framework (that) links tasks to cognitive abilities, and these to indicators that measure performance in different AI fields» (Tolan *et al.*, 2021, p. 192). Unsurprisingly, while some authors argue that the introduction of these technologies may, generate additional employment – albeit of widely varying quality – (Autor, 2015; Bessen, 2019), others are warning of a massive employment destruction, deteriorations of working conditions and, even, a deepest polarization of labor (Goos, Manning and Salomons, 2014; Han *et al.*, 2020; Tolan *et al.*, 2021; Dabis and Czaki, 2024; Molina Derteano, 2025).

Beyond the risk of displacement posed by increasingly advanced technologies, parallel challenges emerge concerning the demand for new skill sets, the modalities of their acquisition and training, and the broader implications for formal education systems.

The second dimension further encompasses the rise of novel forms of labor control, together with new performance requirements driven by algorithms and mechanisms of «depersonalized» oversight (Grigera and Nava, 2021; Hickok and Maslej, 2023). Closely related to these issues are concerns about the implications of so-called ‘black box’ models and the potential misuse of private information, both of which serve as inputs for generative AI to intensify surveillance and streamline personnel selection processes.

3. Analysis

This study adopts a qualitative and comparative research design centered on the thematic analysis of regulatory documents governing the use of Artificial Intelligence (AI) in the labor sphere. Its purpose is to identify points of convergence and divergence in how different jurisdictions – the European Union (EU), Argentina, and Uruguay – address the implications of AI for employment, labor rights, and social equity.

The comparative analysis presented in this paper draws on four key regulatory instruments: the «Recomendaciones para el Uso de la Inteligencia Artificial en Argentina (Disposición 2/2023)» (Recommendations for the Use of Artificial Intelligence in Argentina), the «Estrategia Nacional de Inteligencia Artificial del Uruguay 2024–2030» (Uruguay’s National Artificial Intelligence Strategy 2024-2030), the «Ethical Guidelines for Trustworthy AI» issued by the European Commission, alongside «Regulation (EU) 2024/1689» of the European Union. These documents represent the current legal frameworks governing AI and GenAI within the respective territories analyzed.

The analysis follows the thematic framework proposed by Braun and Clarke (2006), enabling systematic identification, organization, and cross-jurisdictional comparison of recurring themes within the selected regulations.

The thematic analysis of legislation was conducted across the following dimensions:

Privacy, Data, and Work: Regulations concerning data protection and privacy in relation to access to employment and the performance of work.

Impact of AI on Work: Legislative considerations regarding the impact of AI on employment and work.

Impact on Unemployment and Possible Solutions: Legislative considerations on the impact of AI on unemployment and potential solutions.

Reskilling and Task Substitution: Considerations on how AI redistributes and displaces certain work tasks, creating the need for workers to acquire new skills (reskilling), or fully automates specific functions previously performed by humans (substitution).

Education and Employment: Regulations addressing the relationship between new jobs created by AI and the educational needs they entail.

Impacts on Inequality: Considerations regarding potential inequalities that could be reduced or exacerbated by the spread of AI.

A brief profile of each country is provided below based on these variables.

3.1. Argentina

Privacy, Data, and Labor: The regulation does not specify data protection in relation to labor, although it requires the protection of personal data to prevent algorithmic discrimination.

Impact of AI on Work: The law states that AI «enables the improvement of administrative and productive processes» as it «can contribute to the strengthening of capacities in public employment» (Disposition 2/2023).

Impact on Unemployment and Possible Solutions: The legislation asserts that the inclusion of AI «may lead to job displacement if not accompanied by appropriate policies» while also highlighting the «risk of labor exclusion for sectors without access to training» (Disposition 2/2023).

Reskilling and Task Substitution: The analyzed document links training with reskilling, stating that «training and job repositioning will be established based on the type of adoption model to be used» (Disposition 2/2023).

Education and Employment: Education, dissemination, and promotion of AI inclusion are proposed as means to «reduce resistance to the adoption of these technologies, increasing the likelihood of success, sustainability, and innovation» (Disposition 2/2023).

Impacts on Inequality: Inequality is addressed in terms of web accessibility, as the regulation emphasizes the need to «ensure a minimum level of accessibility (Level A)» (Disposition 2/2023).

3.2. European Union

Privacy, Data, and Labor: The legislation prohibits AI systems involving citizen scoring (Regulation 2024/1689). One of the most interesting aspects of European legislation is the classification of «high-risk» AI systems, specifically those «intended to be used for the recruitment or selection of natural persons, in particular to place targeted job advertisements, to analyse and filter job applications, and to evaluate candidates» (Regulation 2024/1689), as well as for promotion, termination, task allocation, or supervision based on individual characteristics. It also prohibits «the placing on the market, the putting into service, or the use of AI systems intended to be used to detect the emotional state of individuals in situations related to the workplace and education» (Regulation 2024/1689).

Impact of AI on Work: The law establishes that AI will transform the world of work, but it should do so by «assisting» people in employment and should «aim for the creation of meaningful work» (Ethical Guidelines for Trustworthy AI, European Commission).

One of the principles of AI in the Ethical Guidelines for Trustworthy AI is the principle of harm prevention. This emphasizes:

technical robustness, which is linked to the principle of prevention of harm. Technical robustness requires that AI systems to be developed with a preventative approach to risks and in a manner that they reliably behave as intended while minimizing unintentional and unexpected harm and preventing unacceptable harm. This should also apply to potential changes in their operating environment or the presence of other agents (human and artificial) that may interact with the system in an adversarial manner. In addition, the physical and mental integrity of humans should be ensured. (Ethical Guidelines for Trustworthy AI).

Impact on Unemployment and Possible Solutions: Again, «AI systems used in employment, workers management and access to self-employment» are considered high-risk (Regulation 2024/1689). In addition to algorithmic discrimination, there is the risk of technological unemployment and the need for skill adaptation to cope with changes driven by AI.

Reskilling and Task Substitution: No specific details are provided in the documents.

Education and Employment: The legislation calls for AI literacy pro-

grams that equip providers, those responsible for deployment, and affected individuals with the necessary concepts to make informed decisions (Regulation 2024/1689). In this context,

Users should be able to make informed autonomous decisions regarding AI systems. They should be given the knowledge and tools to comprehend and interact with AI systems to a satisfactory degree and, where possible, be enabled to reasonably self-assess or challenge the system. (Ethical Guidelines for Trustworthy AI, European Commission).

Impacts on Inequality: Social welfare is positioned as a horizon and objective for the inclusion of AI (Ethical Guidelines for Trustworthy AI, European Commission). It also highlights high-risk systems that decide on social benefits and services, as «those systems may have a significant impact on persons' livelihood and may infringe their fundamental rights, such as the right to social protection, non-discrimination, human dignity or an effective remedy» (Regulation 2024/1689). The same applies to areas such as security, migration, asylum, justice administration, and the right to vote.

3.3. Uruguay

Privacy, Data, and Labor: Although characteristics regarding the protection of personal data are established, no specific features related to labor are outlined.

Impact of AI on Work: The Uruguayan law proposes a «comprehensive approach that includes infrastructure, data, talent management, and skills» Talent management, in reference to workers, and the inclusion of AI are described as «a key driver for economic growth with inclusion, sustainable development of the country, strengthening the competitiveness of the private sector, deepening the digital transformation process of Uruguay, improving management and public services, and enhancing research and innovation» (National Strategy for Artificial Intelligence of Uruguay 2024-2030). A whole section of the law (Section 3.5) is dedicated to the impacts of AI on employment.

Impact on Unemployment and Possible Solutions: «Encouraging training and the creation of employment opportunities» is one of the goals of the law. Similarly, the law considers it central to “implement training and upskilling programs for those who are employed or unemployed» (National Strategy for Artificial Intelligence of Uruguay 2024-2030), proposing training as a solution to potential unemployment.

Reskilling and Task Substitution: Recognizing the continuous technological changes to come, the legislation proposes conducting

studies and projections on how AI will affect different labor sectors to anticipate changes and prepare appropriate responses, including identifying regulatory gaps to ensure the rights of people in the labor market in the face of AI development and use (National Strategy for Artificial Intelligence of Uruguay 2024-2030).

Thus, potential reskilling due to the inclusion of new technologies is a concern for Uruguay.

Education and Employment: One of the goals of the National Strategy for Artificial Intelligence of Uruguay 2024-2030 is to

promote the development of technological skills and competencies in the population, encouraging the inclusion of AI knowledge in various training and educational approaches, from an interdisciplinary perspective. This will ensure effective adaptation to the new challenges of the labor market» (National Strategy for Artificial Intelligence of Uruguay 2024-2030).

The focus on competencies is related to talent management mentioned earlier under the «Impact of AI on Work» title (Section 3.5), and it promotes «the inclusion of AI training in formal and non-formal education at all levels of education in Uruguay, starting from early education, fostering the incorporation of necessary skills and competencies for work and the development of the industry» (National Strategy for Artificial Intelligence of Uruguay 2024-2030).

Education planning extends beyond the workforce, promoting training and public awareness for the entire population on the risks, opportunities, and rights associated with the ethical and safe use of AI, particularly in the fight against disinformation. In this context, the law also promotes initiatives to increase women's participation in STEM (Science, Technology, Engineering, and Mathematics) careers, as well as the design and implementation of a comprehensive training plan targeting all State personnel involved, at every level.

Impacts on Inequality: The law aims to promote the development and use of AI «as a tool to promote the inclusion of traditionally excluded groups from the labor market, such as people with disabilities». Through a human rights approach, the law requires addressing the risks for more vulnerable social groups and adopting measures «to tackle the implications of AI concerning gender equality and other structural inequalities». It also encourages that all individuals access the benefits of AI, «addressing digital divides that enable achieving this goal». In this regard, the Uruguayan law is the only one that directly addresses digital divides as a source of inequality, which is not explicitly mentioned by other regions. Likewise, this law is the only one that sets the objective of «promoting the creation, improvement, and use of open-source AI systems» (National Strategy for Artificial Intelligence of Uruguay 2024-2030).

4. Legislation comparison

The findings indicate that the European Union places particular emphasis on privacy, data management, and the necessary accountability in the use of AI. These measures ensure that AI-driven decisions do not negatively impact workers and remain subject to human oversight.

Tab. 1 - Comparison of Labor Aspects in AI Legislation

<i>Labor Aspects</i>	<i>Argentina</i>	<i>European Union</i>	<i>Uruguay</i>
Privacy, data, and work	Not specified	-High risk: systems for hiring or job selection -Prohibits detecting emotions	Not specified
Impact of AI on work	-Administrative improvement -Public sector	-Create useful jobs -Prevention of harm: physical and mental integrity	-Talent management
Impact on unemployment and possible solutions	- Adequate policies - Risk for untrained sectors	-Algorithmic discrimination - Skill adaptation	-Training for unemployment
Reskilling and Task substitution	-Training and relocation	Not specified	- Projections to prepare responses
Education and employment	-Dissemination /promotion: reduce adoption resistance	- IA Literacy for decision-making.	-Promote technological competencies and skills -Generate adaptation to AI -IA Education in all levels -Fight against misinformation
Impacts on inequality	- Web accessibility	- High risk: social benefits and services	-Inclusion of excluded groups -Measures for digital divides

Source: Own elaboration.

The EU categorizes as «high-risk» those technologies that could generate such effects. A key focus is on preventing AI systems from functioning as «black box» entities, where decision-making processes cannot be supervised or evaluated.

In contrast, Argentine regulations primarily aim to accelerate technological adoption, with a central concern about unemployment resulting from the replacement of human labor by machinery through AI – a problem already highlighted in automation theories. The lack of a specific legal framework

addressing the intersection of labor and technology necessitates Argentina's alignment with general regulations, such as those of UNESCO, and even consideration of adopting elements of European legislation.

Meanwhile, Uruguay has enacted one of the most recent AI laws, which focuses on targeting and solving pre-existing inequalities and addressing the new disparities that could arise from IA inclusion.

5. Conclusions

The comparative analysis reveals that, although the European Union and Latin American countries such as Argentina and Uruguay recognize the transformative impact of AI on labor, their regulatory priorities diverge substantially. The European Union (EU) adopts a preventive approach, focusing on avoiding citizen control (citizen scoring and emotion detection), classifying such AI systems as high-risk in the workplace. This stance emphasizes privacy protection, physical and mental integrity of workers, and accountability in the use of AI technologies. In contrast, Argentina and Uruguay frame AI primarily as a driver of innovation, competitiveness, and economic growth, placing stronger emphasis on training, inclusion, and skills development. Their legislation is more focused on promoting technological adoption and more geared toward addressing the potential impacts of AI on employment and the re-skilling of workers, while still considering economic growth.

These differences suggest that regulatory approaches are shaped not only by technological capabilities but also by broader socio-economic priorities and institutional capacities. While the EU has developed a robust architecture of risk-based oversight, Latin American strategies remain more aspirational and oriented toward leveraging AI as an opportunity for national development. However, both regions share concerns over worker protection, human oversight, and the need to address inequalities.

Common priorities across all three regions include the protection of workers from the potential adverse effects of AI, highlighting the importance of labor reskilling, human control over AI systems, and the traceability of algorithms as key mechanisms to ensure transparency and fairness in the application of AI in the workplace.

From a policy perspective, bridging these approaches could yield more balanced frameworks that safeguard rights while fostering innovation. This would entail:

- Strengthening mechanisms to prevent algorithmic discrimination and opaque decision-making.
- Embedding reskilling and lifelong learning policies into AI strategies.

- Incorporating explicit measures to mitigate the exacerbation of existing social and economic inequalities.
- Encouraging cross-regional cooperation to harmonize AI governance principles and labor protections.

Ultimately, the governance of AI in the workplace must evolve alongside technological developments, combining precautionary measures with proactive labor market adaptation strategies. Future research should examine not only the formal provisions of these regulations but also their practical implementation, enforcement capacity, and real-world labor impacts.

Finally, this study examines policy and legal frameworks as written; it does not assess their enforcement, practical implementation, or effectiveness in mitigating AI-related labor risks. Furthermore, the selection of cases is limited to two Latin American countries and the European Union, which constrains the generalizability of the findings. Nevertheless, the comparative scope provides valuable insights into distinct regulatory philosophies and their implications for labor governance in the age of AI.

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8. Neither too much nor too little. Advances in the measurement of digital platform work in Latin America and Europe

by *Patricia Mariel Sorribas, María Celeste Gómez*

1. Introduction: Platform economy and platformisation of work¹

Digital economies refer to those activities that increasingly depend on information and communication technologies (ICTs), data and the internet for their business models. This simple definition cuts across many traditional economic sectors (Srnicek, 2017). Digital platforms are complex sets composed of software, hardware, operations, and networks (Zysman, 2015). Through this digital infrastructure, they play the role of providers of online intermediation services (ILO, 2024), facilitating economically beneficial interactions between different users or groups of them: customers, suppliers, advertisers, producers or distributors (Demary and Rusche, 2018). The platform economy is characterized by large companies that constitute a third economic agent (in addition to suppliers and demanders of a good or service) that captures and limits all the information related to the service, and that bases its business model on the use of ICTs, data and the internet.

In the process of platformisation, workers incorporate digital technologies as a central input for their work and the platforms facilitate the digital interaction of two or more groups, mediated by algorithms that qualify them, articulating the entire production process and reconfiguring labour relations. This facilitation is done through a completely virtual service (an application or a website). As such, it is the only one of the three parties that has full access and control over the platform's data, processes, and standards. The

¹ This chapter was elaborated in the context of the INCASII2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

particular software architecture of the digital platform causes a structural information asymmetry and, through it, an asymmetry of power. This pattern becomes even more apparent when we observe how venture capital and network effects promote increasing market concentration (Schmidt, 2017).

This position, achieved by technological advances, makes it possible for companies to combine within this platformisation process: a) a configuration of working times on on-demand platforms that entails the deepening of longer-term processes (intensification of working times); b) the emergence of new trends (algorithmic-based evaluation of workers, new forms of incentives and unpaid working time) and c) the reintroduction of schemes of the initial stages of capitalism (long working hours, low pay, piecework, and intensification of work rhythms).

This leads López Mourelo (2020) to argue that labour practices that date back to the nineteenth century are being regenerated and prefigure future generations of digital day laborers. This constitutes a setback in the labour rights won by transferring business risks to independent workers and leaving social costs, such as the threat of poverty in old age, for society (Schmidt, 2017).

In turn, these trends underscore social inequality thanks to temporal arbitrage (Chen and Sun, 2020), a regime that is inherent to capitalism and consists of benefiting from the stratification of people's time value. This differential temporal order exploits the work and time of one group of people (through labour hyper-outsourcing) to support the time management and "no waiting" lifestyle of another, more privileged group. Temporary arbitration normalises the client's cultural expectations for the fulfillment of timed and closely monitored services and of workers who perform their tasks in an increasingly frenetic, fragmented, and risky manner.

On the one hand, platformisation represents new regime of technological informality or precariousness 4.0 that stresses the classic categories of salaried and independent employment and that affects various jobs, from the most professionalised to the less skilled ones.

On the other hand, platforms extract data provided by users in their transactions, manipulate them to produce information with commercial value, and thus obtain an additional rent, algorithmic rent (Mazzucato *et al.*, 2020), which represents the part of value capture that is invisible to users and that configures an additional power that distinguishes them from traditional monopolies. Zuboff (2019) has described this as creating a behavioural surplus, as it is virtually free for the platform company to collect, process, and share such data through the use of machine learning and increasingly sophisticated algorithms. The rates they charge are included in the Gross Domestic Product (GDP) figures, but the information provided free of charge by users with

high commercial value cannot be tracked and, consequently, is not computed in GDP.

These multiple changes due to platformisation are global, cross-border, and occur in various latitudes. We can observe them both in Europe, Asia and the global South. Particularly in Latin America, a region shaped by highly informal and precarious labour markets, platforms (computer services companies) spread rapidly due to incentive policies that facilitated their establishment, exacerbating existing conditions.

To address these changes, supranational states and institutions are advancing at different paces in the registration and regulation of these companies and the work they mediate and facilitate. The heterogeneity of these institutional responses constitutes a relevant object of analysis that makes it possible to evaluate their scope and limitations, make a general balance and propose innovations that can feed back into government decisions on these issues. These progresses are important. In any case we should recognize that workers' rights enshrined in national or supranational regulations (Europe) are difficult to guarantee in practice because platform companies circumvent existing rules and dispute roles (Piasna, 2024).

2. Official statistics on work on digital platforms

The platform economy is rich in data. Never before have we had the possibility of having so much detailed information about human work. This quality would have to be configured as an opportunity for governmental and regulatory action. However, the gap between opportunity and reality is definitely wide.

Despite the high penetration of platforms in the various regions, information on the forms of work associated with them is still scarce and fragmented. Official statistics that have not innovated fail to account for the characteristics of this type of labour insertion. For this reason, they are invisible in other categories: non-salaried workers, self-employed, some forms of atypical salaried work or broader informal workers. This makes it difficult to establish the prevalence, trajectory, and impact of these occupations, which constitute a hidden population, as they are not part of public records and there are no major regulations that force companies to report their number (Madariaga *et al.*, 2019).

Based on surveys carried out by non-official organisations (OECD/ILO/European Union, 2023), there is some progress in official polls reflected in supplementary modules of the Labour Force Survey (LFS), household surveys and internet use surveys. The results obtained with these

instruments are very uneven due to heterogenic methodological criteria, both between and within countries.

Besides, this progress in registration varies depending on the type of the platforms work. Based on Schmidt's (2017) taxonomy, we find that location-based services, which require tasks performed in a specific place and at a specific time by a particular person who is responsible for the task (gig work), are more registered in many jurisdictions. This is facilitated by operating at the city level and having much more visibility than web-based services. Moreover, location-based platforms collect much more sensitive personal data, as workers (in some cases also customers) are tracked through their smartphones. All these characteristics make them a more relevant and feasible object for official statistics.

In regional terms, it is worth mentioning that the relative shortage of this type of state action in Latin America and the Caribbean is notable compared to Europe (ILO, 2024), where, in addition to national initiatives, there are multi-country measurements using the same instruments.

Considering these gaps, the inclusion of questions on platform work in periodic national surveys and the standardization of data collection represent an important imperative to gather the evidence needed to address a wide range of public policy issues (ILO, 2024).

In the following section we account for these variations and present the main characteristics of each case. As can be recognised, the terminology used in the revised documents lacks harmonisation, some assume more restrictive definitions than others and each precedent adopt different contributions from the productions made by ILO, OECD and the European Commission.

Based on these data and the contributions made within the framework of the event "Official statistics to measure work on digital platforms: a review of background and proposals for Argentina", we finally set out some general guidelines that would allow adjusting the measurement of employment and work mediated by digital platforms.

2.1. Latin America: Chile, Brazil, Costa Rica and Mexico

There are no multi-country studies in the region, nor state efforts to harmonize their official statistics. We identified four cases of progress in the official registration of employment and work on digital platforms.

The cases of Brazil (4th quarter of 2022) and Costa Rica (2021-2) do not have continuity. In Costa Rica, the objective of the registry was to analyze the impact of the COVID-19 pandemic on the Costa Rican labour market with an emphasis on teleworking and the measurement was limited to the

main occupation of a salaried person who used digital tools through web platforms or digital application as a means to execute tasks of their paid work or to obtain clients or perform their sales or service work (INEC, 2022).

The instrument used in Brazil does not allow us to know precisely which platforms those who work using them are linked to. Among the examples they provide include some local companies together with other transnational companies, but the data does not allow us to identify which of them are the most used. It does allow us to know who used more than one type of digital platform, since the questionnaire differentiates between applications for transporting people, distribution or delivery of food or products, etc., general or professional services and e-commerce. It also allows us to know some characteristics of the working conditions. Specifically, it investigates the level of autonomy of the worker (who determines the value of the task, the customers to be served, deadlines for the task and the method of payment). It also asks about the reasons that condition the working day: incentives, bonuses or promotions that vary prices; threats of punishment, blocks by the app; shifts, days suggested by the app; days and times chosen independently. However, these variables cannot be associated with specific companies, making it impossible to know precisely the variation in working conditions between similar platforms. These variables correspond to the definition of digital work platform assumed by the Brazilian Institute of Geography and Statistics (IBGE, 2023), derived from the OECD/ILO/European Union (2023) and which recognizes significant control over the organization and assignment of work and the remuneration of the workers they perform.

Both countries have limitations in relation to who answered the questionnaire and problems in phrasing. In Brazil, those employed in the public sector were excluded and in Costa Rica those who had reported that they teleworked (dependency relationship). Both experiences in the phrases emphasize the offer of services or goods and did not include content that explicitly refers to income generation.

On the other hand, the cases of Chile (since 2020) and Mexico (since 2019) do have continuity, they do not give examples of digital platforms in the phrasing or in the response options, they resort to the LFS instrument, they contemplate all possible types of platforms, they allow obtaining information on both the main and secondary occupations and specifically identify which platforms were used.

The case of Mexico stands out for including variables that allow the evaluation of specific working conditions of this type of occupations that are not considered in the regular instrument and that allow the evaluation of the level of control and organization of work. In “Block I – Non-subordinates”, it is inquired whether the intermediary company establishes: a) the price, b) the

minimum number of tasks to be performed, c) place, route or work areas and d) the suppliers/customers with whom it is necessary to work. It also inquires if the company provides an online application or app, about the forms of payment the worker he receives, if the income is for completed work or for quantity produced and delivered; if it obtains income that results from the number of sales and/or customers served and by the social security and medical services (IMSS).

More specifically, in “Block K - Subordinates and Non-Subordinates” it is determined whether the worker habitually uses an app or website to: promote or sell products or services; respond to service requests; follow up on the service provided to a client. It also inquires regarding the app or website used. Similar questions appear in Blocks M and O dedicated to Subordinates and Non-Subordinates – Secondary Occupation.

Furthermore, in relation to the unemployed, it allows us to know if they have registered and are active in any app or platform, offering some examples of them to guide the response and including an open response that enables the construction of a dictionary of these companies.

Although the collection of information continues, it should be noted that the second measurement (2023) was implemented in only three cities. The 2025 version of the National Survey of Occupation and Employment will include questions on employment linked to digital platforms. It introduces a change in the phrasing to account for the intermediary nature of the digital platform in the provision of the service: “this work is usually done through a mobile application or web platform?”. Then the name of the mobile app or web platform is openly investigated and pre-coded options are provided, to have a first classification.

A distinctive feature of Chile is that it has a regulatory framework (Law 21431 and Law 21553) that seeks to formalize labour relations and that defines both digital labour platforms (services) and those who work using them and that clarifies what must be recorded in official statistics that to date are considered experimental. This Law focuses on localized platforms that allow services to be provided in a specific geographical territory. In any case, the fieldwork manual of the National Employment Survey (NES) uses a broader definition covering four types of platforms: a) those that mediate digital services, b) those that mediate work, c) those that mediate goods, and d) those that mediate goods and services (Niculcar, 2025).

In the questionnaire they designed, in addition to a clarification on what a platform or application is, it is indicated that it should only be registered when its use is predominant or exclusive in the occupation.

With the open responses, the platforms with which the Chilean population works are precisely identified. A dictionary is being developed and is con-

stantly being revised due to the dynamism in the creation and destruction of this type of app, platforms and types of work. By means of an imputation procedure based on answers to other variables (occupation, activity of the worker's company and the company that pays the salary), the open answers are validated. In addition, responses that correspond to platforms that are limited to publishing advertisements for the provision of services, sale or rental of movable or immovable property (Facebook, Instagram or Whatsapp) that are used for the sale of goods or services are recorded as valid (INE, 2022).

The digital platforms dictionary is an input that allows generating a typology of platforms, validating their relevance in measurement, tracking the emergence of local options (e.g. <https://spatagonia.cl> - <https://www.dogin.cl> - <https://www.transvip.cl>) and analyzing this type of companies jointly between the INE and the Ministry of Labour. As of September 2025, there are 72 active platforms.

It should be taken into consideration that the ENE registers the number of employed people, not jobs. Therefore, there may be the case of multiple registrations of a worker on more than one platform.

At the institutional level, it should be noted that they have a Higher Labour Council that is moving towards the third evaluation of Law 21.431 and that will deliver recommendations for improvement and prepare content for the discussions of the 114th ILC 2026 (Niculcar, 2025).

A widely recognized problem is the lack of administrative records. In Chile, this problem is partly addressed by Law 21.553, which regulates Transportation Application Companies (TAC) and provides for the registration of information on both companies and workers who use the app to provide passenger transportation services. It contemplates an electronic registry with the list of transport application companies and authorized drivers, which will be subdivided by regions. The registry includes the description and name of the services and applications offered by the TAC, with the detailed specification of the platforms and technologies it has, the authorised drivers and the vehicles assigned to each region. This important legal advance is not yet operational. Although it was sanctioned in 2023, to date it does not have its regulations. In April 2025, the Ministry of Labour reintroduced the regulation for the third time and, according to Gálvez and León (2025), it generated negative reactions from the companies involved.

2.2. Countries of Europe and Norway (EFTA)

In this region, there are multi-country studies that show the efforts of States to harmonize their official statistics. In 2019, the Eurostat Working

Group on Employment in Digital Platforms (DPE) was formed, a subgroup of the Labour Market Statistics expert group (LAMAS) that in 2022 produced a proposal for experimental statistics. In 2022, specific questions on employment and work on digital platforms were included as a modular questionnaire in the EU LFS. Countries participated voluntarily. The data were produced by 16 EU countries: Belgium, Denmark, Ireland, Greece, France, Italy, Cyprus, Latvia, Hungary, Malta, the Netherlands, Poland, Portugal, Romania, Slovenia and Finland, and one EFTA country: Norway.

The list of variables and the model questionnaire proposed to measure the prevalence of DPE and the characteristics of this form of use were designed in three submodules. One dedicated to the identification of the workers of the digital platform and type of service or work on the platform in the last 12 months, including a list of 15 jobs (e.g. programming/coding, renting out accommodation or transport services). Another submodule investigates the characteristics of employment on the digital platform (e.g. hours worked in the last month, frequency of days including one hour of work in the last calendar month, monthly net income and social security coverage). The last submodule investigates the organisation and control of employment on the digital platform (e.g. type of assignment of work, service or task; degree of autonomy to accept work or services, decision on working hours or pricing) (European Commission, 2024). The instrument allows the identification of the main platform of work. At the beginning it is clarified that teleworking carried out for an employer is excluded and that it only refers to work carried out in the context of a triangular relationship between the respondent, a client and a digital platform such as Uber, Deliveroo, Airbnb, Freelancer.com or YouTube.

A new data production procedure is planned for 2026. According to the annex with the technical specifications, the three submodules and the variables used in 2022 are maintained.

In addition to this harmonized registry among the 17 countries, some countries implemented their own studies: Denmark, France, Italy and Finland.

Denmark and Finland registered this type of work in 2017 as part of the LFS and there was no continuity. The case of Finland stands out for asking directly for specific platforms along with an open option “other”. The pilot tests prior to the survey had shown that respondents did not understand what they should consider within the scope of work and income on digital platforms (Sutela, 2018), therefore, instead of a more general definition, they chose to ask about specific platforms in the final version. In the case of Denmark, the study was conducted to examine the possible relationships between different types of digital platforms and the risks of precariousness. In

addition, there were debates in this country about capital platforms due to the non-payment of taxes on the income earned through them. As a result, the Danish tax authorities developed a series of guidelines on how to correctly declare private income generated through capital platforms. Two questions were added to the instrument to find out if people generated income by performing tasks (e.g. Uber) or renting their property (e.g. Airbnb) through digital platforms.

On the other hand, France makes an approach to the work mediated by digital platforms based on the register of New Companies - Survey of Microentrepreneurs (SINE), mainly related to localized services and to a lesser extent to cloud services. So far, there are two registration periods: 2018-9 and 2021-2. These data complement those obtained in the multi-country study.

The case of Italy shows a process of review and improvement in the measurement of these activities between 2018, 2021 and 2022. They added a module on the gig economy to the telephone survey “Participation, Work and Unemployment” (INAPP-PLUS Survey). In the 2021 and 2022 versions, three submodules are differentiated that all respondents answer: online product sales, work via platform and capital platform.

The 2021 version a) expands the options of platforms including Instagram; b) changes the way of asking about income; c) extends the time reference to compare income between 2019 and 2020; d) inquires about the working time (days and hours). In the submodule corresponding to platforms that mediate work, it is considered whether the person is active on more than one platform and an open question is included to determine the platform(s) used. These are then checked using a platform dictionary. It is noteworthy that it investigates whether the person is the one who manages the account of the platform for which they work and that variables were included that allow the level of worker autonomy to be assessed (e.g., “what parameters are used to determine your compensation?”). In the 2022 version of the questionnaire, when it specifically asks about the work and activities carried out in the cloud, an additional question was added to find out what it consisted of (data entry, software development, private lessons, translations, image recognition or others).

The National Institute of Innovation in Public Policy Analysis (INAPP) of Italy has been varying the phrasing that clarifies what a job or employment mediated by digital platforms, or gig economy, is. In the latest version of the introduction to the submodule, the following is stated: «Many Italians earn money by renting a small room, designing websites, selling products they have designed at home, delivering food, or driving their own cars. This on-demand economy, or so-called gig economy, is creating economies that

generate a lot of interest and drive innovation. But it also raises difficult questions about job protection and what good work will look like in the future». And in the submodule dedicated to platforms that mediate work, it is clarified that reference is made to «those who are looking for work or tasks through a website or mobile app that connects them directly with those who request them. These platforms (e.g., Foodora, Glovo, AMT, Upwork, etc.) require workers to create a user profile to find and accept tasks and get paid once completed».

As in the case of Chile, in Italy they implement another instrument that complements the data obtained by INAPP-PLUS. In 2022. This is the Survey on Digital Platforms (INAPP DPS) included in the National Statistical Program, which is mandatory and has a sample of 40.000 companies in specific economic sectors: gastronomy, tourism and transport.

Finally, Switzerland conducted its own official studies between 2019 and 2024 by adding a module to the LFS. This case highlights the measurement of the temporal dimension of platform work (intensity, frequency, etc.) using two reference frames: the last 12 months and the survey's reference week. It also investigates whether the platform charges a fee or commission and «why did they choose this form of work? » The 2025 questionnaire does not have such a module.

2.3. Other cases: Singapore, USA, Canada and Australia

The study carried out in Australia was specific (Australians and the Gig Economy Survey, 2018) and officially assumed by the Victorian Department of Premier and Cabinet. Due to the specificity of the instrument, it was possible to delve into various aspects of this work. They inquired about the trajectory of people who had stopped working through digital platforms. The answers were given both in relation to the main platform and to all the platforms on which they worked. It was possible to measure the degree to which they used their skills, experience or qualifications and satisfaction with various aspects of the work along with a set of variables widely used in other cases.

Subsequently, the Australian Bureau of Statistics implemented an experimental statistical exercise with an initial module on digital platform workers added to the Multi-Purpose Household Survey (MPE) during the 2022-23 fiscal year. The MPE supplements the monthly LFS. This exercise did not consider those who perform this work less regularly, those who did not work during the reference period (four weeks and reference week), or those who work more sporadically or ad hoc. The additional questions added for the 2023-24 financial year will expand the initial statistics to also cover these

irregular work arrangements and generate statistics for multiple reference periods. It is noteworthy that this instrument establishes distinctions in the measurement of working time: time spent searching for or bidding for tasks; hours spent performing paid tasks on digital platforms and hours spent performing unpaid tasks related to platform work.

In Singapore, official registration begins in 2020 and continues within the LFS. Unlike other experiences, it limits the measurement to self-employed workers who use digital platforms that mediate work. Shared equity or e-commerce platforms are not included, as labour is not the primary commodity traded in those cases. Additionally, they investigate the motivations for accepting platform work and the challenges faced. For this country, platform operators impose rules, requirements, or prohibitions on these workers and use data to automate decisions that affect them (such as task assignment and pay per task). Therefore, this official registry is crucial for the design of policies for the protection of these people (Heng, 2023).

For Canada, data are available from two different instruments. In the LFS (Fast Track Module –October 2016 collection) they limit themselves to questions whether people offered transportation services such as Uber, Lyft, etc., or private accommodation services such as Airbnb, Flipkey, etc. The 2018 version of the Canadian Internet Use Survey - Online Work Block, allowed us to know if people worked on different types of platforms through multiple choice options (e.g., online bulletin board for physical products, peer-to-peer services on platforms, online freelance work or advertising revenue, among others). On the other hand, the 2022 version of this instrument, after clarifying what it is to work on platforms, is limited to a single question: «Did you personally earn income from contracts concluded over the Internet related to the informal economy or the sale of services or goods that you created»?

Finally, in the US, data were produced using three different instruments. The Federal Reserve's 2019 Survey on Home Economics and Decision-Making (SHED) focused on some specific services that fall under the informal economy: childcare, housekeeping, and ridesharing. The Contingent Labour Survey (2017 and 2023), a complement to the monthly National Employment Survey, made it possible to know who provided localized and/or cloud services. In these cases, the functions of the position, the usual working hours and the name of the employer can be known. Questions were added in the 2023 version about whether workers receive advance notice of their work schedules and how much control they have over them. The Bureau of Labour Statistics intends to publish additional estimates of this supplement in the future, the exact date of publication of which will be determined in the near future. The Computer and Internet Use Supplement (CIUS 2017, 2019, 2021, and 2023), which is compiled as a companion to the Current Population Survey (CPS),

measures both labour-mediating platforms (localized and cloud services) and capital platforms. This instrument has more continuity; however, its phrasing emphasizes the action of “offering” (e.g. «do you offer rentals on Airbnb?»).

Tab. 1 and Tab. 2 make it easy to visualize the similarities and differences between the different experiences of official registration.

Tab. 1 – Countries with official registrations: types of platforms, occupation and instrument

Country	Types of platforms				Type of occupation			Instrument
	Work	Capital	Selling goods	E-commerce	Main	Secondary	Additional	
Italy	block	block	block		x	?	?	INAAP -plus
Mexico	x	x	x	x	x	x		LFS. National Occupation and Employment
Brazil	Place.		x	x	and unique			PNAD- Continued LFS
Costa Rica	Loc. and in the cloud	x	x	x	x			Continuous employment survey
Chile	Located		x	x	x	x		National Employment Survey + Official EAT Registration
Multi-national (EU)	Loc. and in the cloud	x	x	x	x	x	x	2022: Pilot 2026: EU LFS module
Australia	Loc. and in the cloud				can be imputed based on answers to questions about time and remuneration			Multi-Purpose Household Survey 2022-23. Complements the LFS
Australia	Loc. and in the cloud	x	x	x	x	x	x	Australians and the Gig Economy Survey
Canada	Loc. and in the cloud	2018	x	x	2018		2018	Canadian Internet Use Survey - Online Work Block
Canada	x	x						LFS Fast Track Module 2016

USA	Loc. and in the cloud					x	x	x	Contingent Work Survey Suppl. to the LFS
USA	x								Survey on Home Economics and Decision Making 2019
USA	x	x							Computer and Internet Use Supplement, Current Population Survey
France	Loc. and in the cloud					x	x		Microentrepreneurs Survey (SINE)
France	«Customers communicate with you through a platform or a third party that redirects them to you»								LFS
Singapore	located					x	x		LFS
Finland	x	x	x	x		proportion of revenue received through platforms			LFS
Denmark	x	x				Inquire about the level of revenue generated			LFS
Switzerland	Loc. and in the cloud	x	x	x		x	x	x	LFS
Switzerland	Loc. and in the cloud								ICT usage survey of OMNIBUS ICT surveys

Source: own elaboration based on secondary sources.

Tab. 2 – Countries with official registrations: platform identification, time reference, phrasing and multi-platforms

Country	Platform examples	Identification of the platform(s)	Temporary ref.	Phrasing problem	Multiplatform
Italy	yes	yes	Last 12 months		yes
Mexico	no	Block K: yes Bloque D: no Bloque I: yes	No. «usually»	Yes. See changes for 2025	no
Brazil	yes	no	week of reference	...obtained clients and provided services	yes

Costa Rica	no	indirectly	Last 12 months	... to get clients and do their work	no
Chile	no	Yes (dictionary)	week of Reference + antiquity		between main and secondary
Multinational (EU)	no	2022: Number of main platform/app	Last 12 months		Between types
Australia			4 weeks previous + 1 week reference		Between types
Australia	yes	Yes: list of platforms + open question	Last 12 months		Yes: Main platform and all platform-forms
Canada	2018	no	Last 12 months		Between types
Canada	yes	no	Last 12 months		Between types
USA	no	Yes, in regular instrument microdata	Last week		Between types
USA	yes	no	No data	emphasis on offering	no
France	no	no	New microentrepreneurs		yes
France	no	no	the last 12 months		
Singapore	no	?	the last 12 months		
Finland	Yes for each type	Yes: Some platforms + some other	the last 12 months	Pilot tests: they ask for specific platforms	
Denmark	only 2: Uber and Airbnb	no	the last 12 months		Between types
Switzerland	Yes for each type	2019 Yes, open question. 2024: the most important + other	last 12 months as a filter question, and last week. Inquire about seniority		Between types

Source: own elaboration based on secondary sources.

3. Discussions and proposals

The progress made by States and at the European level in registering employment and work on digital platforms has been evidenced, mainly, in LFS.

Due to the characteristics of this instrument, it is feasible to include questions or modules of questions that can then be analyzed in relation to the other variables measured. Periodicity, insofar as it allows for timely changes, is another advantage for monitoring labour or social protection policies. In addition, it enables comparative analysis between employed people, differentiating hybrid workers from those who only work on digital platforms. To advance in the estimation of the prevalence of these workers, a simple question could be included that allows us to know how many people perform this type of work in the household.

Beyond the difficulties in understanding what it is to work on a platform that were registered in the case of Finland, we can say that the inclusion of a question for the specific name of the digital platform is crucial. The construction of dictionaries (Chile, Mexico and Italy) offers the possibility of controlling the quality of the data and thus correctly classifying the respondents. In addition, it allows to know the variety of companies in the country and detect those that are local or national and compare them with the most dominant, transnational.

Another relevant dimension is the level of autonomy of these workers, who are mostly self-employed. This category, in general, assumes a high degree of autonomy. Being able to accurately assess the level of control, surveillance and organization of the activities carried out by companies makes it possible to have evidence to discuss policies aimed at achieving decent work. In this regard, the progress made by several countries (Italy, Mexico, Brazil, Australia and Switzerland) and at the European level stands out. It is also relevant to contemplate new questions that allow us to capture the temporal dimension more precisely, as Switzerland and Australia did, and to relate this dimension to the autonomy of workers.

A not insignificant issue is that of institutional design. In the case of Chile, the articulation between the National Institute of Statistics, the Ministry of Transport and Telecommunications and the Ministry of Labour must be highlighted. This articulation was possible thanks to the existence of a regulatory framework that provides for the official registration of these activities. Having a Higher Labour Council to follow up on Law 21.431 that will deliver recommendations for improvement and prepare content for the discussions of the 114th ILC 2026 is an institutional innovation that deserves to be taken into account by those Latin American countries that have not made methodological innovations. Something similar can be said with regard to Italy and the complementarity of the data produced from two different sources (workers and companies).

Finally, the introduction of a very simple question that would allow us to know whether the person surveyed is both the owner and the manager of the

account/profile would provide information on the hyper-outsourcing or subcontracting of labour (Srnicsek, 2017) suffered by the workforce corresponding to the last step of the production process of austere platforms, mainly migrants. (van Doorn, Ferrari and Graham, 2022; Lam and Triandafyllidou, 2022). Italy has already made progress in this regard. In countries where the immigrant population is linked to this type of occupation, it is imperative to evaluate these processes as they generate greater vulnerability for workers.

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9. Promoting eco-social-growth policies: The case of the steel sector in Italy, the Netherlands and Argentina

by *Luca Novelli, Renata Semenza*

1. Introduction¹

The ecological transition, meant as decarbonization, will have different impacts in different territories as a function of their economic structure. The territories characterized by the presence of extractive and fossil industries will go through major transformation. This chapter investigates three cases, each defined by the presence of the steel industry: Taranto (Italy), San Nicolas de los Arroyos (Argentina) and IJmuiden (the Netherlands). In the context of the ecological transition, the steel sector is of paramount importance. In Europe the steel sector alone accounts for more than 5% of EU27 CO₂ emissions, around 190Mt, for a production of 132 million tons in 2020 (World Steel Association, 2021). In Europe alone, the sector provides for 300.000 direct jobs and nearly 2.5 million indirect ones, mostly located in Germany, Italy, France and in the Netherlands (Somers, 2022). As far as decarbonisation is concerned, the steel sector is the only one - along with energy production - that implies coal as raw material. Other than decarbonization, steel production has a disruptive impact on local-level environment, with serious health consequences, involving higher cancer rates for workers and threat on public health for emissions of dioxins, polycyclic aromatic hydrocarbons, and heavy metals such as lead, cadmium, chrome and arsenic.

Against this background, this chapter aims to i) define, through the eco-social-growth trilemma, the three institutional contexts, the positions and

¹ This chapter was elaborated in the context of the INCASII2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

priorities of socio-political actors (in particular trade unions) and map most relevant conflicts; ii) elaborate on the mix of welfare (eco-social) and industrial policies adopted at local and national levels.

The methodological approach is based on the comparative method and in particular the sectoral and geographical case study as a unit of analysis. The use of the comparative case study allows us to outline similarities and differences between cases, and to show the social consequences and policy implications arising from each of them.

The three cases share relevant similarities, including a common historical development, their economic sector and their importance for the local economy. However, they could not be qualified as «most similar», due to significant variations in their institutional contexts. To overcome this limitation, this chapter deploys the contextualised comparison method (Locke and Thelen, 1995; Thelen, 2018). Based on political constructivism, this research design permits to capture how different institutional systems react to similar challenges. Rather than assuming that functionally equivalent groups in different contexts share the same priorities, this approach put instead more emphasis on the analysis of the flashpoint generated by common shared shocks (Thelen, 2018, p. 3).

In analytical terms this chapter uses the eco-social-growth trilemma. The trilemma is a heuristic that «refers to the condition of institutional or political actors confronted with decisions that pertain to the achievement of social, economic and ecological goals» (Mandelli *et al.*, 2021). This framework is particularly useful for two reasons. First, it permits to systematize the relevant dimensions defining the different mechanisms of institutional regulation (Chiarello and Greco, 2014); second, it allows to analyze how socio-political actors, such as trade unions, frame the relationship between the economic, the social and the ecological dimension when it comes to policy decisions (Mandelli *et al.*, 2021; Mandelli and Novelli, 2022).

The chapter is structured in two sections. The first section describes the analytical instruments adopted, namely the concepts of regulation, the eco-social-growth trilemma and eco-social policies; moreover, an assessment on expected inequalities is presented, as well as a discussion of the existing literature on trade unions in the green transition. Instead, the second section goes through the three cases, describing their institutional mechanisms of regulation, the priorities and positions of trade unions, the inequalities, the conflicts and the policy mixes adopted.

2. Section one. Literature review and analytical background

2.1. *The eco-social-growth trilemma and eco-social policies*

During the second half of the XX century, the attempt to mediate the labor-capital conflict produced a long-lasting, yet unstable, social pact, defined as the «Half-century social compromise» (Crouch, 1999). Accordingly, the labour movement ceased to claim a revision of the right of property, while conversely the bourgeois class recognized relevant social rights. Due to a peculiar distribution of power resources, the class conflict was channeled into democratic institutions, with a rebalancing in favor of the weaker part, i.e. labor (Korpi, 1983). However, after the 1970's, this equilibrium was thrown into crisis by a large-scale change in enabling conditions. The main change occurred due to the double process of deindustrialisation and privatisation, which reached its peak in the mid-1990s, with a parallel movement: on the one hand industries were closed; on the other, public industrial assets were typically privatized for the benefit of private capital. The bargaining capacity of the labour movement decreased, and labour protections as well as welfare provisions were put under pressure (Howell, 2020). Furthermore, from the 1970s onwards, new ideological movements influenced the social landscape of industrialised nations. Indeed, post-materialist values, including environmental protection (Inglehart, 1977), began to take hold during this period. In accordance with the conceptualisations proposed by Chiarello and Greco (2014), a significant transformation occurred in the mechanisms of institutional regulation, which is defined as the system of productive, distributive, and redistributive relations among actors (Regini, 1991).

Against this background, the eco-social-growth trilemma is a promising analytical instrument to assess the relevant dimensions defining those mechanisms. The latter delineates three autonomous objectives: the social, ecological and economic objectives. When applied to the steel sector, these objectives are, respectively, employment and health for the social dimension, income and profits for the economic one, and the combating of pollution and climate change for the ecological one. In the «half-century social compromise» phase, Keynesian macro-economic institutions and corporatist industrial relations, facilitated a relatively balanced distribution of resources between capital and labour, through mass employment endowed with high salaries and relatively good contractual conditions. The health and environmental dimensions were disregarded, conceptualised as inevitable externalities, or otherwise overlooked (Schnaiberg, 1980).

This precarious – and contested – synergy between economic and social spheres was broke up and replaced, in time, by a new arrangement of factors,

defined – to simplify – as neoliberalism. In this new context, industry as a driver for social integration paved the way for exclusively profit-oriented strategies, leading to a worsening in working conditions and in employment. Due to the stratification of environmental and health damages, this phase was defined as «noxious de-industrialisation» (Feltrin *et al.*, 2021), a «negative-sum game in which job loss (and/or its growing precariousness) and environmental degradation go hand in hand» (Leonardi, 2023).

Nevertheless, in recent times, environmental issues have been discovered as political objectives, and in particular the European contexts, during the 2019 climate strikes. Accordingly, the adoption of the European Green Deal represents a relevant innovation in the attempt to address the interrelated challenges of the eco-social-growth trilemma: the progressive emancipation from fossil fuels, as well as other innovations in the building, transport and industrial sectors, should reconcile the different spheres. Against this general landscape, the steel sector is particularly interesting. One possible strategy to address the trilemma through technological innovation is the greening of the production process, which can be achieved by partially phasing out coal and integrating electric arc furnaces with traditional blast furnace technology. In addition, the implementation of Direct Reduced Iron (DRI) plants, which could supply both types of furnaces, should represent a further advance in improving the local environmental performance. This new configuration would reduce CO₂ emissions and progressively move towards carbon neutrality.

2.2. The politics of decarbonization and the inequalities in the job-environmental dilemma

In recent years social sciences have witnessed the development of labour environmentalism or environmental labour studies as a field of study. The starting point of this literature is the recognition that industrial employment has been historically rooted in modes of production that not only harm the environment and climate but also jeopardize health and safety of workers and local communities, or more broadly, social reproduction (Barca, 2019). Accordingly, the current state of technological development and the hegemonic macro-economic paradigm prevent industrial production – and the related employment and profits – from display in a synergy with environmental and health protection. The aim of this literature is to explore how organised labour reconcile the competing imperatives of employment and environmental protection, examining concrete union strategies on different levels (Ratzhel and Uzzel, 2013). Two distinct positions can be identified in this

regard. On the one hand, trade union can rely on neoliberal positions (Tomassetti, 2020), often grounded in the «Treadmill of Production» approach, according to which unlimited growth is paired with the exponential depletion of natural resources and, ultimately, the biosphere compromise (Schnaiberg, 1980). On the other hand, instead, organized labour can support green transition plans and climate policies, aligning with strategies and actions characteristic of labour environmentalism *sensu stricto*.

A further distinction in the literature concerns the «depth» of unions positions on environmental issues (Stavis and Felli, 2020; Mandelli and Novelli, 2022; Greco, 2023). In this sense, unions may adopt «strategic position» or a «transformative position». The former implies advocating for a «technological fix» – framing environmental and climate issues as technological problems that can be addressed through the adoption of newer and cleaner production systems. Instead, the latter proposes an «organic» understanding of the labour-environment nexus (Wissen and Brand, 2021), often aligning with the «social movement discourse» (Stavis and Felli, 2020), which critiques capitalism as system that produce “sacrifice zones” to guarantee profit accumulation (Bullard, 1990; Lerner, 2012).

Drawing on this, a closely related body of literature examines the structure and dynamics associated with industrial facilities. Industrial regions often exhibit common social and economic dynamics, and are referred to as «sacrifice zones», where the environmental and climate-related costs of the global economy are disproportionately concentrated (Barca and Leonardi, 2018; Novelli, 2025). In these areas, the relationship between capital and labour is typically characterized by occupational blackmail, i.e. «threat of relevant job loss as a structural cause for the production of environmental justice» (Barca and Leonardi, 2018). Another typical characteristic of these territories is the presence of monopsonistic labour market, where job-demand is predominantly provided by pollutant industries (Tomassetti, 2020). These industries hinder economic diversification through a series of lock-in effects (Grabher, 1993; Greco and Di Fabbio, 2014) that ultimately concur in the maintaining of a fossil-based status quo. This dynamic leads to income distribution and profit accumulation, coupled with large climate-changing emissions, stratification of local environmental damage and severe health consequences (Chiarello and Greco, 2014).

According to this literature, in the industrial areas, the social costs of the transition are more visible, as unemployment risk is already a public policy issue. Consequently, trade unions are expected to defend the status quo maintenance and to oppose plans of green transition, that eventually entail a workforce reduction. The so-called «sectoral expectations» are based on this argument (Thomas and Doerflinger, 2020; Kalt, 2022). Accordingly, the

support for green policies is expected to be stronger in sectors that are less carbon-intensive and that do not depend on coal as a raw material, such as renewables education, health, and public employment. Instead, in «grey» sectors, the transition will have the highest social costs, either threatening the very existence of the sector – as in the case of coal mining – or downsizing it significantly, as seen in the automotive industry (Galgoczi, 2023). In the steel sector, which is both coal-dependent and highly carbon-intensive, it is widely expected that the unions will oppose conversion plans.

3. Section two. Three case studies

3.1. Taranto. Intractable imperatives in a multifaceted crisis

The ILVA of Taranto, built in 1965 by ITALSIDER, the Italian state-owned steel company, is the largest steel plant in Europe, with four blast furnaces capable of producing over 10 million tons annually. A dozen years after the judicial seizure occurred in 2012, the plant employs around 8.000 workers, half of whom are enrolled in the *Cassa Integrazione Guadagni*², and, since then, its industrial output has significantly declined, reaching a historic low of less than 3 million tons in 2023. Taranto is an ideal-typical representation of a «sacrifice zone» (Barca and Leonardi, 2018): it is situated in an economically depressed area in the periphery of the European geography where industrial activities have in time seriously compromised the biochemical equilibrium of the area. The labour market indicators show an economically depressed area with low activity rates (49.8%) and employment rates (43.2%) and 13.5% unemployment. (ISTAT, 2024).

As nowadays, already on the brink of the *miracolo economico*, industrial unemployment was a public issue, following the closure of the military arsenal. For an extended period, lasting at least until the privatisation in 1995, the public steel industry sought to address this issue. At the apex of this model, during the 1970s, the plant employed around 30.000 workers (Piattoni, 1996). However, this reliance on a single economic activity created a form of economic dependency within the area: the industrial gigantism developed a monopsonistic labour market, in which ILVA was the dominant demand of work – especially for the popular classes (Tomasetti, 2020). The scenario changed in the 1990s, when the ILVA group was privatized and sold to the Riva Group. This marked the conclusion of a process begun in the late

² Passive labour market policy scheme that suspends the labour activity in favour of a compensation pay by the State.

1980s following the decline of ITALSIDER: the new ownership realized an unprecedented turnover, hiring approximately 7.000 workers and pre-pensioning most of the workers born in the 1940s and in the 1950s (Dumford and Greco, 2007).

During the Riva period the health/environmental externalities of the plant imposed as priority, despite evidence dating back to the 1970's (Romeo, 2019), Two environmental NGOs, Legambiente and Peacelink, formed the committee «*AltaMarea contro l'inquinamento*» (High Tide Against Pollution) that emerged as a key actor, asking for the cleaning of the production, through the adoption of the Best Available Technology (BAT) to mitigate pollution. A few months after the publishing of the *AIA*, the judiciary seized the plant, blaming the owners and the management for environmental and sanitary disasters.

After the seizure, in 2013, the government posed the plant under its supervision. A plan known as «piano Ronchi-Bondi» would combine coal-based blast-furnace production with electric furnaces, eventually powered by Direct Reduced Iron (DRI).

After the European election in 2014, and the subsequent government change, the *piano Ronchi-Bondi* was set aside: the plant was leased to ArcelorMittal, the new owners, for the period 2018-2024. The French Indian company furtherly downsized the workforce, with 2300 lay-offs in Taranto, and pushing production to historically low level. Currently, ILVA is once again under government supervision and is looking for new private purchasers.

Since 2012, the health and environmental imperatives have become intractable. The city divided into two fronts: on the one hand, the «industrialists», which wish to maintain the production, composed by the FIM, the UILM and the entrepreneurs associations (CONFAPI, CONFINDUSTRIA, Camera di Commercio); on the other hand instead, the «environmentalist», which instead advocate for its closure and the environmental remediation, composed instead by the socio-environmentalist movements and, until 2018, USB. Starting from this moment, a third perspective emerges, which aims at the composition of the environmental and health sphere with production (which guarantees employment for the workers and profits for the owners), pushed by Metalworkers Unions (FIOM) and Legambiente.

3.2. IJmuiden. A difficult path toward a technological solution

The IJmuiden Koninklijke Hoogovens – now Tata Steel IJmuiden – is a paradigmatic case in the context of the green transition. Established with a public-private ownership at the beginning of the 20th century, this plant is

one of the largest industrial facilities in the Netherlands. Endowed with two 3-milions tons per year capacity blast furnaces, it employs about 10.000 workers and has an annual industrial output of about 6 million tons of steel, making it the largest emitter of carbon dioxide in the Netherlands (Nederlandse Emissieautoriteit, 2022). IJmuiden is nested in the Randstad, arguably one of the most dynamic European areas. The facilities of Tata Steel are situated in the Noord-Holland Region, that comprehend also the city of Amsterdam and Zaandam. The labour market is very performing with a very low unemployment rate (3.8%) and a very high activity (89.5%), and employment rate (82.6%) (Eurostat, 2024).

Steel production in the IJmond began during World War I, in 1917, driven by the growing demand of the arising Dutch national industry. Thirty years later, after World War II, as a part of the broader effort to rebuild the national industrial system, the plant was renovated, partially through the financial aid of Marshall Plan (Schenk, 2000). The workforce rose: still at the end of the 1990s the employees in the plant were more than 20000 (Van Steen, 1999). In the context of the re-organisation of the European steel market, in the late 1990s, the Hoogovens IJmuiden merged with British Steel to form Corus, at time the third-largest steel company worldwide. The workforce underwent significant downsizing, primarily through retirements not compensated for by new hires: the number of employees fell from 23.000 to less than 10.000. Eight years after the merger, in 2007, the Indian company Tata Steel acquired Corus, renaming it Tata Steel Europe. Following Brexit, in 2021, Tata Steel restructured the company, restoring the pre-Corus situation and splitting the operations into Tata Steel IJmuiden and Tata Steel UK.

In 2018 a mobilization began, contesting the environmental impact of the plant and its health consequences, after a graphite rain invested Wijk aan Zee, the village nearest to the plant. In response, an informal citizen group, later formalized as the Frisse Winde Foundation in 2021, began monitoring the environmental consequences of the plant's operations while advocating for a comprehensive green transition for it. The mobilisation gained momentum, reaching the national attention in the following years, advocating for its closure and for the greening of the whole production processes.

In response to the double pressure emerging from the Wjik aan Zee community, and the EU commitment for decarbonisation, Tata elaborated in 2020 a plan that envisage the implementation of carbon capture and storage systems (CCSs) to reduce the CO₂ emissions. Trade unions, and particularly the FNV, criticized the plan, arguing it was insufficient to tackle the climate and environmental issues associated with the plant (Dutch News, 2021). Following a period of consultation, the FNV published its *Groene Staal* (Green Steel) plan (FNV, 2021), that proposes a partial green conversion of the plant

through the implementation of an electric arc furnace and of a DRI plant, along with the dismissal of coke oven 2, of a power plant powered by the coke oven's gas (Gas Plant 2 - KGF2) and of blast furnace 7 – envisaging a similar perspective to the *piano Ronchi-Bondi* implemented in Taranto. However, since already the *Groene Staal* plan acknowledges that «this new way of production is less labor intensive» (FNV, 2021, p. 5) concerns emerged about employment. A year later, the Social Contract for Green Steel was drafted (FNV, 2022). between the unions and the steel company regarding the job losses, and the strategy to manage job redundancies. Workers affected by the transition will have three potential pathways: i) the older ones, who meet the necessary criteria will be incentivized to early retirement schemes; ii) some will undergo re-skilling and up-skilling programs, facilitated by the works council, trade unions and Tata, meant to relocate them within the company; iii) in the other cases workers will be dismissed with severance pay of 60.000€. Despite its aim to partially transition away from coal-based production, the *Groene Staal* plan has faced significant criticisms. In fact, the «technological» solution proposed by FNV would be less labour-intensive, but nevertheless capable of generating consensus, because it addresses the environmental issues. Still, environmental groups criticize this solution because it does not consider the health problems, which are denied by both the union and the owners. In general, all actors recognize the need to intervene, but there is no consensus on what solution to adopt. While this chapter is being written, negotiations are ongoing.

3.3. San Nicolás de los Arroyos. Capital and labor between conflict and recomposition

The Ternium-Siderar plant in San Nicolas de los Arroyos is the largest steel producer in the *Cono Sur*, comprehending Argentina, Chile, Bolivia and Paraguay. Situated at the border of the Province of Buenos Aires and Santa Fé, on the edges of the Paraná River, it has a capacity of 4million tons of steel per year, and it is endowed with two blast furnaces. In the last few years production reached an output of about 2million tons, due to the negative conjuncture affecting the internal demand.

The plant of San Nicolas de los Arroyos is located 230km away from Buenos Aires, in the geographic region of the *Pampa Húmeda*. The economic context is defined by the presence of important manufactures in San Nicolas/Ramallo and in Villa Constitution, but the core economic activity is represented by intensive cultivation of cereals and farming. The labour market data are in line with the Argentinian context, marked by high degree of

informality and low activity (43.2%) and employment (39.7%) rates in 2024 (INDEC, 2024). With more than 6.000 workers, the Ternium Siderar plant represents the most important source of jobs in the region, having produced, in time, a relation of economic dependency with the city of San Nicolas, similarly as it for the described Italian case.

The plant started its operation in 1960 as Sociedad Mixta Siderúrgica Argentina (SOMISA), as part of a broader strategy of industrialization pushed by the militaries (in the figure of the General Manuel Savio, to which the plant was called after) and driven by internal demand, in the context of the *Import Substitution Industrialization (ISI) strategy*, steel production was a fundamental industry, as it powered the rest of the developing national manufacturing industry. In line with the Taranto case, before the establishment of the steel plant, the main economic activities were mainly agriculture and breeding, typical of the *Pampa Húmeda*. The installation of the gigantic state-owned company – the largest manufacturing plant in the country (Rofman and Penalva, 2015) – profoundly change the socio-economic context, leading to a process of modernization in the *Partido* of Ramallo, in which were installed a cold-rolling plant. The positive economic conjuncture led to the building of a second blast furnace in 1973 (*Alto Horno Evita*) and to the implementation, in 1979 of the continuous cast.

With the military *coup d'état* on March 24, 1976, although the output levels remained relatively stable (Mussi, 2017), the social relation between labour and capital profoundly changed. In fact, the first fifteen years of industrialization saw relevant enhancement in the labour condition, mainly in terms of social protection and rising salaries, due to the grassroots activism of the “Somiseros” (Soul, 2014) and by the collective bargaining operated by the Union Obrera Metallurgica (UOM). From 1976 this path changed, in the context of a broader process of realignment of the political economy in the interest of capital. In the 1980s, despite the fall of the military junta and a brief post-crisis recovery period in 1981, the economic situation was less favourable than in the previous decade. In fact, while, at the peak of SOMISA’s operations the plant employed 12,000 workers directly plus about 2000 indirect workers (Rofman and Penalva, 1995), in 1992, this number halved, reaching the current employment level.

This privatization produced a phase of tension and social conflict, as workers and trade unions sharply opposed Meném project, through strikes and roadblock. Conditional to this was in fact a process of “reorganization”, entailing about 5.600 dismissals. The literature frames this process as a part of a broad set of “stabilization policies” aimed at reforming industrial policies and state intervention in the economy, and, simultaneously, to face the capitalist accumulation crisis (Bonnet, 2008). The conflict was composed by

an encompassing agreement, signed by the UOM and the government, envisaging a path of early retirement for the older workers and a severance pay for the younger ones.

The new company, Techint, owned by the Rocca family, reorganise the structure of the workforce, imposing a new organisational model and promoting the vertical integration of the management. In a similar way, the Rocca operated a precarisation of the workforce: the number of direct jobs in the plant decreased from 6.627 in 1994 to 5.460 in 2015; the number of subcontracted workers increased from almost 3.000 in 1991 to 5.546 in 2011 (Soul, 2017). The last years has been characterised by an increasing tension between capital and labour.

In the area of San Nicolás – unlike the other two cases presented – there has been no contestation by socio-environmental organizations concerning health and environmental issues. The absence of socio-environmental mobilization should not be related to cleaner production methods, as the plants all use the same technology as in Taranto and in IJmuiden. Moreover, it appears that environmental monitoring bodies are underdeveloped, and that emissions data are solely produced by the company itself. In addition, it is important to note that the labor union plays a role in the provision of health services, operating a hospital in San Nicolás. In this sense, the social conflict is framed more traditionally along the capital-labor cleavage, without demanding broader or systemic social change.

4. Preliminary conclusions

Coming to the conclusions, the sectoral cases studied in the three countries are paradigmatic of the industrial development model, first Fordist and then post-Fordist, culminating in the current phase of conflict between labor, capital and environment, illustrated here through the eco-social-growth trilemma. In historical terms three macro-phases can be identified: Keynesian (from the founding of the factories until the 1990s), neoliberal (1990s–2010), and contestation (2010 to the present). Having detailed the first two in the cases in the paper, we will focus more on the «contestation» phase. In fact, the shift from the «neoliberal» to the «contestation» has produced an arrangement of factors according to which the classical capital–labor conflict dynamic has been joined by an additional dimension. Indeed, the activism of local communities and environmental associations brought environmental and health issues to the forefront as intractable objectives that had to be integrated into a new balance.

In Taranto, this occurred starting in 2007/8 thanks to a large popular

mobilization, with the leading role of organizations such as Legambiente and Peacelink. This process reached its climax in 2012, when the judiciary ordered the judicial seizure of the plant, accusing the company's executives and sectors of local and regional politics of environmental and health disaster. From that moment on, and with the arrival of collectives such as the Free and Thinking Citizens Committee and the USB union, a new phase of high conflictivity was opened. In this context, the main unions — especially UILM and FIM — openly aligned with the company and against the judiciary, while FIOM adopted a more critical stance, which crystallized in the Ronchi-Bondi Plan, where as early as 2014 the decarbonization of the plant was proposed. However, thirteen years after the judicial seizure, and after various management attempts both public and private (such as that of ArceclorMittal), no synthesis has yet been achieved that would reconcile health, labor, profits, and the environment. Moreover, in the absence of investments, the factory is moving toward self-consumption-driven closure, as demonstrated by the incident at Blast Furnace 1 in May 2025, which condemns it to production levels below 2 million tons annually out of a capacity of almost 10 million. In this context, the Italian government has intervened in two ways: on the one hand, covering the plant's major budgetary losses, and on the other, activating passive labor policies affecting more than 4,000 workers through the *Cassa Integrazione* mechanism. In IJmuiden, by contrast, the «third phase» began in 2018. There, a group of citizens organized in the Frisse Winde foundation began denouncing the plant's health and environmental impacts on the locality of Wijk aan Zee, the closest town to the factory. Spurred on by the climate mobilizations of autumn 2019, the protest expanded to other national and international groups, culminating in 2023 with a symbolic occupation of the plant by Greenpeace and other climate activist organizations. In this context, however, proposals exist for an industrial reconversion that would offer a win-win-win solution to the trilemma, by shifting from coal-based production to a less polluting gas-based model. This solution, driven by the main trade union, FNV — which represents 90% of the plant's affiliates — seeks to achieve a new institutional balance capable of overcoming the trilemma, ensuring jobs, profits, and a reduced environmental and health impact. Nonetheless, this process presents several uncertainties, particularly regarding its economic feasibility (as highlighted by the company) and its real impacts on public health (as highlighted by the Frisse Winde foundation). Despite these uncertainties, negotiations are currently underway, and the government has committed itself to robust industrial policies, investing 3 billion euros in the reconversion.

More generally, the three cases and their respective political economies reflect three distinct developmental trajectories. The Dutch case, located at

the heart of one of the richest regions on the planet (the Randstad), demonstrates a possible technological solution, facilitated by consolidated mechanisms of social dialogue and a labor market structurally in a situation of full employment. The case of Taranto, by contrast, presents the characteristics of a «sacrifice zone», marked by a peripheral position within the European political economy, low administrative effectiveness, and an unfavorable institutional context, given that the plant represents more than 60% of local GDP. A similar case, in terms of labor market and the plant's role in the local economy, is that of San Nicolás, where, however, no phase of contestation has so far emerged in relation to the equilibrium structured around the exchange between profits (for the Rocca family) and income (for the workers).

In conclusion, the analysis makes clear that health, environment, and climate are intractable imperatives in the field of industrial production and, more broadly, of the economy. The experience of public industry in Italy and Argentina reveals the potential of this model, particularly in light of the failure of the profit-and-market paradigm to address the eco-social-growth trilemma, given the intensification of the global climate crisis and local socio-environmental crises. A purely «technological» solution, while necessary, is not sufficient, since it does not take into account the intrinsically political nature of harm experienced daily by workers and then externalized through emissions. It is therefore indispensable to envisage production relations rebalanced in favor of labor, which is only possible through a broader transformation of the economic system. In the face of the accumulation crisis we have witnessed since 2020, it becomes necessary to articulate a way out that does not rely on the war industry as the motor of reconstruction, but instead addresses the ecological and social question as two sides of the same problem, both in Europe and – especially – in Latin America, where the political context is more favorable to the construction of radical solutions decoupled from extractivist and fossil-fuel-based capitalism.

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Part III
Care, Welfare and Social Rights:
Policies and Everyday Inequalities

10. Welfare and Care policies in Latin America: theoretical and methodological discussions and persistent challenges for comparative analysis

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1. Introduction¹

In recent years, the intersection between care policies and gender dynamics has emerged as a crucial field of study in contemporary social sciences. Traditionally relegated to the private sphere, care — understood as the tasks, labours, and affections necessary for sustaining life — has taken centre stage in current public, academic, and political debate. Its relevance lies precisely in the fact that the way a society organises and distributes care is related to processes of inequality and models of development.

From this perspective, care policies should not be understood simply as a set of social programmes or assistance services, but as a lens through which to analyse the relationship between the state, the market, families and the community. They are a fundamental element in understanding the form that welfare regimes take, particularly in contexts such as Latin America, characterised by profound social asymmetries, high levels of informal employment and the historical role of the family, and women in particular, as the main providers of welfare.

This chapter addresses this issue, offering a comprehensive review of the specialised literature that has addressed welfare and care policies in Latin America from a comparative perspective. Comparative analysis in the social sciences has been a fundamental methodological and epistemological tradition for understanding the similarities and differences between social,

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

cultural and political phenomena. From transcontextual approaches that use the nation as a unit of analysis to qualitative case studies, comparison has enriched our ability to describe, explain and generalise about social reality (Ved and Lozales, 2016). In particular, we examine the various theoretical and methodological traditions that have shaped this field of knowledge, from cross-contextual studies (cross-national and cross-cultural) to comparative and mixed qualitative case approaches. In Latin America, although this approach has been prolific in the study of political systems and development models, it has had a more incipient development in the field of welfare and care policies.

In this context, the chapter aims to address this gap by offering a critical review of the landscape of comparative studies on welfare and care policies in the region. It analyses the theoretical and methodological perspectives that have dominated the field, as well as those that have been less explored, in order to understand the reasons for these choices and their consequences on the findings. It argues that, although the influence of authors such as Esping-Andersen has been crucial, the adaptation of their theoretical frameworks to the Latin American context has been a complex process, marked by the need to incorporate specific variables such as labour informality, the fragmentation of social protection and, fundamentally, the gender perspective.

The objective is twofold: on the one hand, to map the state of the art of comparative research in the region, identifying the predominant approaches and areas of vacancy; on the other, to reflect on the influences of these theoretical and methodological choices on the findings, on the understanding of care policies and on their implications in terms of gender inequalities. Ultimately, this critical analysis seeks to illuminate future paths for research that integrates the macro, meso, and micro levels and gives voice to the experiences of Latin American women in the complex web of care in contexts of profound inequality.

The chapter is organized into three main sections. The first part provides an overview of the different methodological traditions of comparative research in the social sciences, identifying existing approaches. The second part analyses comparative studies on welfare and care policies in Latin America from a macrosocial perspective, identifying the theoretical and methodological approaches they use. Finally, the last part focuses on comparative research that, in a still incipient way, has addressed care policies from a qualitative perspective at the microsocial level, highlighting the challenges that remain. The final reflections systematise the findings of the chapter and propose new avenues of research to address the methodological challenges identified.

2. Methodological approaches and challenges in comparative studies

International comparison has been the subject of multiple traditions in the social sciences. The investigations carried out have applied comparative theoretical and methodological perspectives, either from the tradition of cross-national and cross-cultural analysis (Kohn, 1987; Fideli, 1998) or from the approach of more similar and more different case studies (Przeworsky and Teune, 1970). Comparative qualitative (Yin, 2014) and mixed (Ragin, 2008) case studies have been less explored. More specifically, on the one hand, cross-national transcontextual studies have been developed that refer to comparative research between two or more countries with statistical data, using the nation as the object, context or unit of analysis; on the other hand, cross-cultural transcontextual research has been carried out, albeit to a lesser extent, focusing on specific objects to be compared qualitatively in two or more countries (Collier, 1994).

Similarly, some studies have focused specifically on describing and explaining concrete problems of social reality, analysing both the similar and different conditions and outcomes (usually the latter) among large social units—such as nations, societies, and cultures—and/or smaller units—such as individuals, social groups, and institutions (Przeworski and Teune, 1970; Smelser, 2003). Among these works, it is worth highlighting those conducted by the International Network for Comparative Analysis of Socioeconomic Inequalities (INCASI). This network has developed an interesting comparative analytical model called AMOSIT (López Roldán and Fachelli, 2021) and has promoted comparative case studies of both most similar and most different cases between European and Latin American countries. These studies have addressed various dimensions of social inequalities, such as pre- and post-distributive policies (Artiles *et al.*, 2021a), labour markets (López Roldán *et al.*, 2021), education (Martínez García *et al.*, 2021), digital transformations (Miguélez *et al.*, 2021), social stratification and mobility (Barozet *et al.*, 2021; Fachelli *et al.*, 2021), the economy (Salvia, 2021), and social policies (Martín Artiles *et al.*, 2021b; Scarponetti *et al.*, 2021).

Other studies have conducted qualitative comparisons, analysing common research objects linked to the actions and representations of particular groups in more than one country. To do so, they have applied multiple and comparative case study designs (Yin, 2014), developing at least two cases (one per country) in order to carry out a comparison that can be theoretically interpreted through the process of analytic induction (Znaniecki, 1934). In this regard, within the framework of the INCASI network, social inequalities have been analysed through comparative qualitative studies between coun-

tries, focusing on gender, feminist states, and care models (Jarty and Bathyány, 2021), as well as on the labour trajectories of different groups of workers (Muñiz and Verd, 2021) belonging to different social classes (Muñiz and Rubilar, 2018), and more recently, research has explored the labour and care trajectories of women from various social classes in Latin America (Muñiz Terra, 2025).

Finally, mixed comparative studies (both quantitative and qualitative) have also been carried out. The INCASI network has aligned with this perspective, promoting the development of inter-methodological research as a structuring axis and as a space for dialogue among its members (Fachelli and Roldán, 2021; Oso and Dalle, 2021). Likewise, other mixed-method studies have been conducted that present a strong orientation towards case-based analysis and a clear rejection of the epistemological assumptions of probabilistic research. These studies have been referred to by Ragin (2008) as Qualitative Comparative Analysis (QCA), whose main interest lies in strengthening the heuristic capacity of causal explanations promoted by the comparative method through a qualitative understanding of social processes.

If we focus on Latin America, it is possible to point out that comparative studies have addressed a multiplicity of social problems linked to comparative political systems or development models (Sunkel and Paz, 1970; O'Donnell *et al.*, 1988; Torre, 1997; to mention a few classic works), with welfare and care policies from a comparative perspective being addressed to a lesser extent. In light of this situation, we seek to answer the following questions: what types of comparative theoretical perspectives have prevailed and which have been less used in the analysis of welfare and care policies in Latin America? What methodological perspectives have been applied and which have received less attention? What are the reasons for these decisions? And what consequences has this had on the findings presented?

3. Welfare and care policies in Latin America

Comparative studies on welfare policies in Latin America emerged under the strong influence of theoretical debates in Europe, particularly based on Esping-Andersen's (1993) work on welfare regimes. This author developed a comparative perspective, focusing particularly on the links between the market, the state and the family in order to provide "decommodified" goods and services, i.e. with the idea of promoting greater state involvement to guarantee welfare, leaving commercial offerings in the background.

This analytical framework, centred on the concept of "decommodification", was initially applied to the Latin American context with the aim of

classifying the different social protection systems existing in the region. However, it soon became clear that the direct application of these theoretical categories presented serious limitations in understanding the particularities of Latin American systems. As Filgueira (1998) points out, the regional context is characterised by a unique combination of historical, political and socio-economic factors that differ substantially from the European reality that inspired the original models. Among these particularities, the following stand out: the presence of states with unequal institutional capacities, high levels of informal employment, fragmented social protection systems, and a leading role for families – and especially women – in providing welfare.

Given these limitations, various Latin American authors undertook the challenge of adapting and reformulating existing theoretical frameworks. Filgueira (1998) proposed one of the first classifications specifically designed for the region, distinguishing between: countries with stratified citizenship (Argentina, Chile, Uruguay), dual regimes (Brazil, Mexico), and exclusionary systems (predominant in Central America). This typology represented a significant advance by incorporating variables specific to the Latin American context, such as historical development patterns, labourmarket structures and political system characteristics.

A fundamental turning point in the evolution of these studies was the incorporation of feminist perspectives into the analysis of welfare regimes. Authors such as Martínez Franzoni (2005) radically questioned the limits of Esping-Andersen's approach, pointing out how his central concept of “decommodification” omitted the analysis of the sexual division of labour and the disproportionate burden of care that fell on women.

Hence, attention is focused not only on the decommodification of goods and services (as proposed by Esping-Andersen), but also on the extent to which families, the state and the market themselves allow for ‘defamiliarisation’, that is, the independence and autonomy of each individual — aggregated into family groups — to participate actively and independently in public spheres outside the sexual division of labour.

Driven by feminist criticism, sociological studies in Latin America over the last 30 years have focused on the debate on social welfare and care as a component of it. Thus, most studies that have focused on:

the social organisation of care have done so from an approach centred on the provision and distribution of welfare (beginning with Esping-Andersen's 1993 proposal), looking primarily at the weight of care responsibilities between the state, the market, the family and the community (Batthyány, 2020, p. 92).

5. Comparing care policies in Latin America: macrosocial perspectives

The integration of care as a pillar of well-being is justified insofar as it is a component of personal development but also a key component for the reproduction of society. In this context, care policies are increasingly emerging as a central pillar aimed at achieving a fair social organisation that contributes to gender equality (ECLAC, 2021).

Despite its importance, care has not been given visibility or a central role in public policies in the region. Studies on the subject have generally focused on specific countries, using various theoretical approaches linked to the economics of care; social welfare and care; care as a right; and the ethics of care (Batthyány, 2020). Thus, there are multiple studies on these issues in Argentina (Esquivel, 2012; Rodríguez Enriquez, 2013; Pautassi and Zibecchi, 2013; Faur, 2014), Uruguay (Salvador, 2011; Batthyány, 2020), Colombia (Munevar and Pineda, 2020), Brazil (Araujo and Hirata, 2020), Cuba (Romero Almodovar *et al.*, 2022) and Chile (Arriagada, 2020).

Less attention has been paid to studies of care policies from transcontextual comparative perspectives or similar and different cases, comparative case studies or QCA perspectives.

The few comparative studies identified can be classified according to whether they compare care policies in terms of the progressive incorporation of care into the legal and regulatory frameworks of Latin American countries, investigating the existence of comprehensive care systems, maternity, paternity and parental leave, breastfeeding protection laws and care service coverage (Rico and Robles, 2016; Gúezmes García and Vaeza, 2023). Another line of research addresses the use of statistics to measure time use and gender values related to unpaid work as important tools for valuing and recognising the unpaid work performed by women in the domestic and care spheres.

These studies can be classified according to whether they are produced by international organisations (ECLAC, ILO, ONU Women) or from a more academic perspective. Focusing on the studies carried out by international organisations (ECLAC, ILO, ONU Women), it is possible to identify research that compares the legislation in force in more than one country, applying cross-national transcontextual analysis or analysis of more similar or different cases. ECLAC's work examines, in particular, labour and social policies based on a legislative analysis.

Studies that focus on policies point to the differential existence of labour and social policies, family-oriented and non-family-oriented policies, and regulatory policies. Family-oriented policies are fundamentally expressed in labour policies and legislation, where care has historically remained the

responsibility of women, through maternity leave. Defamilialising care policies refer to transfers and services that delegate care responsibilities from families – and specifically from women – to services with some state intervention. These can be provided directly by the public sector, involve incentives or subsidies for private provision, or legislate the mandatory provision of subsidies, services or both by employers. Regulatory policies refer to policies related to the purchase of services provided from the home of the person who contracts them. This refers to policies and regulations governing work that is contracted on an individual basis for domestic work that is usually performed by women (Blofield and Martinez Franzoni, 2014).

Studies on these different family-oriented, non-family-oriented and regulatory policies focus their comparison on Latin American countries that have the “best” relative conditions to respond to the transformations of families and labour markets in the region. These countries are Argentina, Brazil, Chile, Costa Rica and Uruguay. Comparative studies mainly use secondary sources, documents, and statistical. The documentary information includes laws, executive decrees and policy documents, reports from executive committees or congresses, interviews, and newspaper articles. The statistical sources include databases compiled by countries, several of which take a sociological approach, or are intended to evaluate or provide policy input.

These studies make cross-national comparisons or comparisons of more similar and more different cases, and point out that the countries analysed have modest social gaps (Filgueira, 2011) and have comparatively more formal labour markets and greater relative social investment than the rest of the countries in Latin America.

However, some of these studies compare countries at a single point in time, i.e. in a given year, or make comparisons over specific periods, comparing countries’ policies between two specific years in order to identify the changes implemented. These latter comparisons show, for example, that while in 2003 Argentina and Chile had comparatively less inclusive conciliatory policies, by 2013 Chile, and particularly Uruguay, had introduced reforms in the three types of policies considered. On the other hand, in both 2003 and 2013, Brazil and Costa Rica had variable performance between policies (Blofield and Martinez Franzoni, 2014). Other studies focused exclusively on comparing labour legislation and the months of maternity leave offered by nations in their labour laws. These studies also make cross-national comparisons and comparisons of more similar and different cases, and use written documents related to the legal regulations of the countries. They are interesting because they highlight women’s limited rights to care and point out that, despite the progress made, major challenges remain in terms of the duration of this type of leave, its financing, its coverage and job protection in the context of care responsibilities.

On the other hand, academic studies, which are still limited, make comparisons between countries, drawing on various statistical sources from countries and international organisations, as well as global surveys conducted by universities (Survey: Global Dynamics of Social Policy - University of Bremen) and independent organisations (World Values Survey - World Values Survey Association WWSA).

Studies using national statistics generally use specific surveys or modules on time use (unpaid work) conducted by countries, which are not always collected in the same year. Thus, although in comparative terms the use of a simultaneous survey would be ideal, the data compiled by countries generally differ by one or two years. Although this situation is noted in the studies carried out, they do not reflect on the implications that an asynchronous survey may have on the comparison and, in general, they do not mention the type of scientific comparison that is carried out. Of course, this does not detract from the relevance of the research carried out, which involves a great deal of comparative effort and, even without specifically mentioning it, makes cross-contextual cross-national comparisons or comparisons of more similar and different cases.

If we focus on these studies, we can point out that, in general terms, they tend to compare the relevance of unpaid work (care and domestic work) in terms of well-being in different groups of countries. Thus, in a comparative study between Colombia, Mexico, Peru and Uruguay (Amarante and Rossel, 2017), unpaid work is analysed, pointing out that although similar empirical patterns can be identified in these countries in terms of the time women devote to unpaid work, there are significant variations in how this type of work is distributed between men and women.

Other studies use the World Values Survey to analyse differences between countries (Mexico, Peru and Ecuador) in relation to the gender distribution of total work, which includes both paid and unpaid work (Campaña *et al.*, 2017). In particular, they ask whether the gender gap unfavourable to women can be explained by substantive national differences in social gender norms, concluding that more egalitarian countries have higher levels of equality in the gender distribution of total work.

Similarly, another line of comparative research has focused on investigating the relationship between well-being, care and social policies at the global level (Böger *et al.*, 2025), between some states in Latin America, Africa and Asia (Antonópoulos, 2008) or, more specifically, between some countries in Latin America and Europe (Bundlender, 2010; Domínguez Amoros *et al.*, 2019, 2021).

Global comparative research focuses on countries' family policies, specifically analysing the labour rights granted by different countries (parental

leave, child benefits, cash transfer programmes and care services) and early childhood education over the years, highlighting the importance of a long-term perspective in understanding the evolution of welfare policy. Using the Global Dynamics of Social Policy database (University of Bremen) and the Non-Contributory Social Protection database (ECLAC), these studies seek to map family and social policy in 45 countries – 23 in Latin America and 22 in Europe, Oceania, and North America – pointing out that, in the Latin American region, paid leave remains anchored in maternalism (maternity leave), benefits for dependent children (family allowance) have gone from being an instrument to ensure family income in key sectors of industrialisation to also reaching poor sectors, and early childhood education has expanded in a fragmented manner (Böger *et al.*, 2025).

Research comparing some countries in the global south (Latin America, Africa and Asia) (Antonópoulos, 2008) focuses on the need to incorporate unpaid work into economic analysis, considering the context of poverty and gender inequality in countries such as Bolivia, Guatemala, Mexico, Nicaragua and other OECD countries.

On the other hand, studies comparing welfare and care between Latin American and European countries focus both on how care is provided by different institutions and individuals in various countries and on the factors explaining the gender gap in the distribution of unpaid work and care within households (Bundlender, 2010; Domínguez Amorós *et al.*, 2019, 2021). These processes are analysed by observing not only gender inequalities but also the demographic changes that countries are undergoing and that warrant transformations in the construction of welfare and care regimes. In relation to the latter, they point out that it is important to consider the increase in female participation in paid work, changes in family structure and size, the gradual growth of single-person households, the sustained decline in population growth, and the trend towards ageing and increased healthy life expectancy, as these transformations imply care needs that have not yet been addressed in protection schemes and policies, especially in Latin American countries (Domínguez Amorós *et al.*, 2019).

This research analyses the similarities and differences in care provision in seven countries through time-use studies, highlighting its impact on individual well-being and economic growth. They point out that, although it would be expected that the increase in female participation in paid work would be reflected in a decrease in unpaid care work, this does not always occur and that, in addition, in developing countries, factors such as age, employment status and the presence of children in the home influence the time devoted to care (Bundlender, 2010).

On the other hand, research analysing the gender gap in the distribution

of unpaid work and care within households compares various countries such as Argentina, Chile, Uruguay and Spain, and uses both time use surveys and the World Values Survey (Domínguez Amorós *et al.*, 2019, 2021). These studies are the only ones that reflect on the limitations of information sources constructed in relation to time use surveys and, specifically, analyse the strategies of dual-income couples that appear to be more egalitarian in the distribution of care work in order to examine the extent to which there is evidence of a transformation of paid and unpaid work among the main persons in the household. They point out, in particular, that women participate more and spend more time on unpaid work than men in countries that, despite differences, share a strong family tradition, a shortage of public care services and a shift to the market, which is a distinctive feature of Latin American countries. In short, they point out that there is no doubt that unpaid care work is an indispensable factor contributing to the well-being of individuals, their families and societies, and should be the subject of public intervention in different countries.

5. Comparing care policies in Latin America: microsocial perspectives

Although the study of welfare and care policies in Latin America has gained relevance in recent years, comparative discussion using qualitative methodology is still in its infancy. In particular, it is interesting to note that only a few regional academic studies have produced comparative analyses yielding qualitative information, with the production of qualitative data and its comparison remaining a pending issue for international organisations in the region.

In terms of theoretical perspective, most studies have focused on the discussion surrounding the provision and distribution of welfare, and, based on the work of Esping-Andersen (1993, 1999), have adapted the typology of welfare regimes to study care policies in this region.

Among the research studies that conduct a comparative analysis of welfare and care policies in Latin America using qualitative methodologies, several lines of study stand out that address the implementation of different conditional income transfer policies in specific countries (Aguirre, 2024). In particular, these studies focus on comparing childcare policies (López Estrada, 2017; López, 2025), with fewer studies focusing on older persons or persons with disabilities.

For example, based on a classification of universalist, targeted or mixed models, the study by López Estrada (2017) seeks to compare childcare

policies in four Latin American countries (Chile, Costa Rica, Uruguay and Mexico), examining their design, coverage and rights-based approach, from an analysis of regulatory frameworks, in order to identify different patterns in service provision and their relationship to gender equality and social protection. Uruguay stands out as a country that is moving towards a universalist model, based on the creation in 2015 of a National Care System with state co-responsibility.

Along these lines, Carmona Gallego (2023) provides analytical clues to understanding the exceptional nature of the Uruguayan case, in contrast to Argentina. The study seeks to compare the care policies implemented in both countries between 2007 and 2017, analysing their progress, limitations and differences within the framework of their respective social protection models in order to understand the divergences in their approaches to care.

Beyond the diversity of theoretical approaches and topics addressed, the comparative analysis of care policies in Latin America from a qualitative microsocial perspective reveals the persistence of gender inequality in relation to the distribution of care work and the recognition of unpaid work. In terms of policies, there is a high degree of fragmentation and little institutionalisation through a set of scattered programmes with limited coverage and a welfare-based approach. However, it also highlights the diverse experiences of women (from an intersectional approach that considers gender, class and ethnic inequalities) and, to a lesser extent, the changes and resistance surrounding the social organisation of care.

In methodological terms, the few studies that exist focus on using a research design based on multiple case studies (Yin, 2014), drawing mainly on secondary documentary sources (such as plans, programmes, legislation, constitutions, and reports from government and international organisations). In this regard, there are certain gaps with regard to the challenge of using qualitative primary data (e.g., produced through in-depth interviews, participant observations, or focus groups). However, there is also a lack of methodological reflexivity (Piovani and Muñiz Terra, 2018) on what and how to compare, which would enrich the debate on the social organization of care in Latin America.

Given this situation, we maintain that studies using qualitative methodologies at the microsocial level are essential for understanding the complexities of care policies in Latin America. This type of methodological approach allows us to explore the experiences and perspectives of the different actors involved in care, as well as to shed light on the cultural and social factors that condition care practices.

6. Conclusions

In this paper, we set out to analyse the comparative literature on welfare and care in Latin America. In conclusion, we argue that comparative studies on welfare policies in Latin America have favoured cross-national approaches, based on statistics from organisations such as the World Bank or ECLAC, with the aim of classifying welfare regimes inspired by — but adapted to — the Esping-Andersen model. These approaches highlight how countries articulate the state, market, and society in order to generate or produce welfare. Within this framework, feminist criticism — such as that of Martínez Franzoni — emphasises the need to analyse domestic-family arrangements as the core of welfare regimes.

This literature has advanced in the organisation, classification and grouping of countries whose differences in the selected variables are minimal. Thus, the comparison is often reduced to predefined groupings (e.g. Argentina, Chile and Uruguay as a cluster). However, there remains a gap in the epistemological and/or methodological reflection on the styles, possibilities and limitations of the comparative perspective employed. In particular, this applies to the criteria for selecting cases, since many studies either compare “similar” countries without explicit justification or cover large samples (17 or 18 countries) without delving into significant contrasts or historical temporalities that would enrich comparative analyses, particularly in a region with heterogeneous political and economic trajectories.

At the methodological level, the analysis of legislation, social protection policy designs and time use surveys predominates, with little integration between analytical levels. On the one hand, macro studies (welfare regimes) rarely engage in dialogue with micro studies (impact of specific policies, such as conditional transfers for schooling or health); on the other hand, there is a lack of comparative qualitative work exploring representations of access to institutional care policies, subjective meanings, or intra-family negotiations around care. This disconnect prevents us from understanding how policies operate in everyday practices, especially in dimensions such as gender, class, or age. In addition, international organisations tend to homogenize diverse realities, omitting profound contrasts — for example, between countries with universal systems and those with welfare-based approaches.

Given this situation, we believe it is necessary to develop research that seeks to overcome these limitations through a qualitative approach focused on the Comparative Biographical Perspective (Muñiz Terra, 2018; Muñiz Terra and Verd, 2021), which reconstructs the work and care trajectories of women belonging to different social classes in Latin America. The use of the Comparative Biographical Perspective is useful in that it allows for the

integration of three levels: welfare regimes (macro), specific labour and care policies (meso) and intra-family dynamics (micro), from an intersectional perspective (of class, gender and age). Ultimately, this perspective will not only contextualise the impact of policies in their State-Market-Family-Community linkages, but also recover voices absent from quantitative studies, moving towards a critical comparison that questions the criteria of similarity and difference in the region.

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11. The Social Reorganization of Care in Pandemic Times: Public Policies, Gender Inequalities, and Community Strategies in the Spanish State

*by Màrius Domínguez-Amorós, Carme Vivancos-Sánchez,
Elisabet Almeda Samaranch*

1. Introduction¹

The sociosanitary crisis caused by the spread of COVID-19 has exposed the consequences of the commodification of public life and human relationships, emphasizing both the importance and vulnerability of the social organization of care, a task predominantly undertaken by women. This research, conducted as part of the R&D project “The Social Reorganization of Care in the Pandemic: Wellbeing, Community, and Gender” (RESCUPAN, PID2020-118801RB-I00), investigates how the pandemic restructured the dynamics of care in Spain. It draws on a mixed-methods approach that includes qualitative interviews and focus groups in different regions (Catalunya, País Valencià, Euskal Herria, and Illes Balears), and a quantitative component using EU27 comparative data.

Through this comprehensive framework, the study seeks to analyze not only the direct effects of the pandemic on caregiving structures, but also the broader social, gendered, and policy-related implications for care in the post-COVID context. This chapter explores how the COVID-19 pandemic has reshaped some care practices and policies in Spain, revealing underlying structural inequalities while also highlighting the emergence of community-based and institutional responses. It offers a preliminary reflection on whe-

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union’s Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

ther these developments signal seeds of transformation or remain partial, sectoral responses to a persistent care crisis. Furthermore, a dedicated section entitled Policy Responses, Tensions and Limitations presents key findings derived from a comparative analysis of policy responses in Europe and Latin America.

The general hypothesis of this study argues that the COVID-19 pandemic, together with the public policies implemented – particularly the social and health measures adopted during the lockdown – brought many previously externalised care needs back into the domestic sphere. This phenomenon profoundly transformed the strategies for providing and organising care work, which continues to fall predominantly on women. Although some households and communities experienced a certain degree of gender-based redistribution of these tasks during confinement, once the most critical phase of the pandemic had passed, these advances largely receded, further intensifying the burden of unpaid care work. In this context, social organisations have assumed a fundamental role in sustaining care provision under conditions of increasing precariousness. This situation reveals the absence of comprehensive family and gender policies capable of recognising and integrating both the necessary cultural changes and the community-based networks of solidarity that have emerged in response to this crisis.

2. Care Work as a Structural Pillar in Crisis Contexts

The pandemic can be understood not solely as a health emergency but as a multidimensional crisis that has questioned the very foundations of our societies. It triggered what some scholars term a “crisis of social reproduction” (Comas, 2014; Fraser, 2016) a rupture in the systems that sustain everyday life. Central to this crisis is the revaluation of care work, which, despite being understood as essential, remains underappreciated, underpaid, or entirely unpaid.

Before COVID-19, the care sector in Spain was already fragile, marked by a reliance on familial and informal networks and underinvestment in public services (Perez Orozco, 2006; García *et al.*, 2014; Comas, 2015). Women, especially those from migrant backgrounds or lower socioeconomic statuses, carried the brunt of caregiving responsibilities (Agrela *et al.*, 2010; Martínez Bujan, 2014; Goñalons-Pons, 2015; Fraser, 2016; Lutz, 2017; Aulenbacher *et al.*, 2018; Domínguez, Donoso and Rubilar, 2019). The pandemic exacerbated these dynamics; as public services were overwhelmed or suspended, the burden shifted further onto households and communities, once again placing women at the core of crisis management (Almeda and Batthyány, 2021).

This scenario has been defined by an over-reliance on what feminist economists call the “care economy,” which encompasses both paid and unpaid labor related to the maintenance of life and wellbeing. The health crisis simply exposed what had long been a structural issue: care is not only the invisible scaffolding of society, but also the most precarious and unequally distributed sector within it (Farre *et al.*, 2020; Castellano-Torres *et al.*, 2020; Almeda and Batthyány, 2021).

For decades, care work has been at the centre of debates on welfare regimes from a gender perspective, shaping discussions about how care needs should be met through the intervention of the state, the market, families, the third sector, and community or neighbourhood networks. Evidence indicates that the relationship among welfare institutions — state, market, third sector, family, and community — has undergone a process of reconfiguration aimed at addressing the needs of social reproduction and, consequently, care provision. This process has been marked by three interrelated tendencies: the commodification or quasi-marketisation of care and its subordination to economic reproduction; the transnationalisation of care work, reflected in the emergence of so-called “global care chains”; and the transformation of the welfare state, accompanied by new forms of government and governance.

3. Methodology

This study employs a mixed-methods methodology to gain both breadth and depth in understanding the pandemic’s effects on care. On the qualitative side, semi-structured interviews were conducted with women engaged in caregiving roles — many of whom faced increased burdens during the lockdown periods. Additionally, focus groups were organized across diverse territories to explore regional disparities and community responses. These discussions illuminated subjective experiences, strategies of resilience, and conflict arising from intensified care responsibilities.

The quantitative component contextualizes the Spanish experience within the broader European framework. Using EU27 data, the project compares Spain’s public investment in care infrastructure, employment trends in caregiving sectors, and the gendered distribution of unpaid work, shedding light on systemic divergences and shared challenges across member states.

For this particular chapter, however, we draw exclusively on the qualitative component, as it provides a more grounded perspective on lived experiences and the social reorganization of care during the pandemic.

4. Findings: Shifts in Family, Work, and Community Dynamics

The data of our qualitative investigation reveals several critical transformations triggered or accelerated by the pandemic as, 1) Household reorganization: The lockdown led to a reconfiguration of domestic dynamics, with family life becoming the central site of caregiving. This often resulted in heightened tension, especially in multigenerational or single-parent households, where the lack of external support was most acute. The redistribution of labor within households remained unequal, with women shouldering the majority of additional responsibilities related to childcare, eldercare, and home schooling; 2) Gendered wellbeing and mental health: The disproportionate increase in care responsibilities had a detrimental effect on the mental and emotional wellbeing of women. Many participants in the study reported burnout, anxiety, and feelings of isolation. These effects were especially pronounced among single mothers and migrant women, who often lacked family networks or legal protections; 3) Labor and Economic Insecurity: Caregivers, both formal and informal, faced severe economic precarity during the crisis. Domestic workers, who are predominantly women of color or migrants, frequently lost employment or were forced into unsafe working conditions without adequate protective measures. The lack of recognition for domestic work in labor legislation further compounded their vulnerability. 4) Community-based responses and solidarity networks: Despite the shortcomings of institutional responses, communities mobilized rapidly. Mutual aid groups, neighborhood solidarity networks, and grassroots initiatives emerged as crucial actors in providing food, emotional support, and informal caregiving assistance. These networks built on pre-existing feminist and community movements, showcasing how civil society can fill gaps left by the state, albeit temporarily and unevenly.

Building on previous findings regarding community networks (Domínguez, Almeda and Vivancos, 2025), it is evident that the suspension of productive activities and the state's limited response to specific social challenges during the COVID-19 pandemic led to a notable reconfiguration of the social organization of care. The pandemic disproportionately affected the most vulnerable groups, and in many urban areas, territorial and sectoral networks of solidarity and mutual aid emerged, playing a crucial role in meeting the needs of these populations. These community- and neighborhood-based care networks implemented strategies to provide goods and services not sufficiently addressed by the state or market. While their primary function was assistential, some initiatives also attempted to promote political and social mobilization around specific claims and foster spaces of the common, emphasizing collective responsibility beyond individual obligations (Martínez-Buján and Vega-Solís, 2021).

The emergence of these networks can also be linked to the associative and cooperative traditions in cities such as Barcelona, Madrid, Bilbao, and Valencia, as well as to the legacy of the 15M movement and subsequent social mobilizations. Although these community networks contributed to fostering a sense of community, mutual support, and neighborhood self-organization, they generally failed to sustain engagement from new participants or maintain the networks established during the confinement period. Social distancing and lockdown measures temporarily suspended the public sphere as a space for social encounter and political life.

The crisis of social reproduction during the pandemic did not generate widespread mobilization toward alternative models of social care. Small adjustments occurred within some households, yet these did not translate into structural changes in care arrangements.

In contrast, the Spanish state demonstrated agency by employing a hybrid discourse combining biomedical, securitarian, and collective-responsibility frameworks. This approach redefined public imaginaries of protection and care, blending welfare-state rhetoric with surveillance and control logics. In doing so, the state symbolically reasserted its protective function, reinforcing legitimacy following prior social and political crises, such as the 2007–2008 financial crisis and the 2010–2011 social mobilizations (15M).

Households unable to address their needs through re-householding (refamilialization) due to precarious labor market positions, or lacking access to furlough schemes (ERTES) and telework, were the most dependent on mutual aid networks. These networks acted as mediators of gender and class inequalities, providing support that counterbalanced structural disadvantages and functioning, in effect, as a counterpoint to existing social and gender hierarchies. The absence of robust public infrastructure to meet basic food and health needs further contributed to processes that might be described as “communitarization”, whereby households collectively mobilized resources as a survival strategy.

In conclusion, community care networks during the pandemic not only provided essential support to vulnerable populations but also revealed the limitations of state provision, highlighting both the adaptive capacity of local communities and the persistence of structural inequalities. This analysis underscores the importance of integrating community-based care strategies into broader social policy frameworks to address systemic inequalities in care and social reproduction.

5. Policy Gaps and Institutional Shortcomings

The Spanish government's response to the pandemic largely prioritized biomedical interventions, emergency financial assistance, and the reinforcement of healthcare infrastructure. While these were undeniably essential, they failed to address the structural role of care in sustaining social life. There was minimal public discourse on caregiving, and policies remained reactive rather than transformative, highlighting both the relevance and the weakness of the existing social organization of care in our societies (Di Nella and Ibáñez, 2020)

Government support for caregivers during the pandemic was often insufficient or ill-targeted. For instance, subsidies were more focused on job retention in the formal economy than on protecting unpaid caregivers or domestic workers. Similarly, measures such as school closures and restrictions on eldercare facilities had unintended consequences that increased domestic care burdens without compensatory support systems, which led many families to face a “new care crisis” (Moré, 2020).

This narrow focus perpetuated a vision of care as a private matter, something to be handled within families, rather than as a collective responsibility to be supported by public policy. As a result, the pandemic deepened pre-existing inequalities in care provision and reinforced traditional gender roles.

6. A Transformative Vision for Care Policy

The findings from this research emphasize that any genuine recovery from the pandemic must go beyond economic stimulus or healthcare investment. A transformative vision of care is necessary: one that redefines social priorities and recognizes care as a central axis of public policy, rather than a marginal concern. Gender-responsive policies are essential to ensure that caregiving does not continue to be an unacknowledged burden placed on women.

Following Carbonero et.al (2020) key policy recommendations included: a) recognition and redistribution: public policies must formally recognize unpaid care work and incentivize its redistribution through parental leave schemes, time-use regulations, and awareness campaigns that challenge traditional gender roles; B) Strengthening public services: There is an urgent need to expand and reinforce public systems of care, especially in education, healthcare, and dependency services. This would reduce reliance on informal or familial networks and provide structured, equitable support to all citizens;

C) Labor market reforms: Employment policies should incorporate a gender perspective, including flexible work arrangements, fair wages for care workers, and legal protections for domestic labour. Targeted support for vulnerable households, such as single-parent families or migrant-led households, is also crucial; D) Cultural and ethical shifts: Beyond policy, a cultural transformation is required. Societies must reassess their collective values, recognizing that sustaining life and fostering relationships are not secondary tasks, but central to human flourishing. This ethical reorientation can support more resilient and equitable models of coexistence.

7. Policy Responses, Tensions and Limitations

Now that we have presented a general overview of some of the findings of our research – and the ideas that emerged regarding the urgent need for a profound transformation in care systems – we will turn to some examples of public policies implemented over the past five years, since the onset of the pandemic. These cases allow us to trace some initial institutional responses to the care crisis and offer a preliminary analytical approach to selected examples. While they do not aim to capture the full complexity of the current care landscape, they serve to illustrate some of the key tensions and limitations that have emerged. This selection reflects the ongoing nature of the research and the intention to contribute to a broader and evolving debate.

Following the initial shock of COVID-19, the Spanish state introduced a set of policy initiatives intended to address long-standing deficits in care provision. Among these, the Plan Corresponsables, developed by the Ministry of Equality, stands out as a significant attempt to support families with children under 14 through the public funding of professional care services. It was presented as an initial step toward the creation of a National Care System. Other measures included the equalization of maternity and paternity leave to 16 weeks, the expansion of public early childhood education for the 0–3 age group, increased funding for the Dependency Law, and a proposed reduction in the standard workweek from 40 to 37.5 hours – a measure framed as part of a broader agenda for time equity and shared responsibility.

Comparative evaluations of childcare expansion and family leave reforms indicate measurable impacts on women’s labour market participation and on the redistribution of care time, although effects vary by policy design and context. OECD analyses show that improved access to early childhood education and care (ECEC) is consistently associated with higher employment rates among women of childbearing age, and that subsidy- and supply-oriented approaches tend to boost maternal employment more effectively than

cash transfers alone (Thévenon, 2015; OECD, 2023). In Latin America, where recent policy moves – such as Uruguay’s National Care System (SNIC) and Chile’s “Chile Crece Contigo” – have targeted childcare and parental leave, positive employment effects are observable but constrained by limited funding, supply bottlenecks, and high informality in the labour market, which reduce the reach of reforms for the most vulnerable groups (Razavi, 2007; Esquivel, 2020; UN Women, 2023).

However, while these proposals indicate a growing institutional awareness of the need to redistribute care more fairly, they have also revealed significant structural and political limitations. Several scholars have pointed out that these policies continue to operate within a normative model of the nuclear family and formal employment, excluding many forms of caregiving that fall outside this framework, such as the work done by unemployed women, retirees, or those engaged in unpaid domestic labour (Roca-Escoda *et al.*, 2022). The dominant policy logic continues to situate care as a private responsibility rather than a collective social obligation, failing to address the diversity and complexity of real-life care arrangements.

Cross-regional comparative research underlines that institutional capacity and welfare regime type mediate policy effectiveness. Nordic and continental European models (e.g., Finland, France, Netherlands) that couple universal ECEC with active labour market policies and generous parental leave show stronger reductions in gender gaps in time use and higher female labour force participation compared with familialistic regimes (Saraceno and Keck, 2011; Lewis, 2020). In contrast, in many Latin American countries, policy advances are frequently partial, patchy, or pilot-based; while they may improve access for some groups, they seldom produce the same redistributive effects at scale because of constrained budgets, fragmented governance, and high levels of informality (Martínez Franzoni and Voorend, 2019; Blofield and Filgueira, 2020). Thus, policy design — especially whether reforms expand public supply, reduce cost barriers, and are integrated with employment and fiscal measures — shapes outcomes profoundly.

From the perspective of feminist economics, a more ambitious transformation would require moving beyond piecemeal reforms toward a structural redefinition of care as a public good and a human right. This implies adopting a model such as Razavi’s “care diamond” (2007) in which the state, the market, the community, and households all share responsibility in a more balanced and integrated way. Achieving this would require cross-sectoral policies that link care with housing, employment, fiscal systems, and food sovereignty — ultimately pointing toward a new social contract around care.

Empirical assessments of integrated, cross-sectoral approaches – where childcare expansion is paired with labour regulations, taxation incentives and

care workforce professionalization – show more durable effects on both equity and quality (Jany-Catrice, 2018; Daly and Ferragina, 2018). Uruguay’s SNIC, for instance, is frequently cited as an instructive model: early evaluations highlight gains in policy coherence, formalization of care work, and public recognition of caregiving as a social right, though long-term effects depend on sustained financing and institutional consolidation (Batthyány, 2021). In Europe, countries combining public provision with workforce regulation (training, wages, labour rights) achieve better outcomes in service quality and gender equality than those relying mainly on monetary transfers or informal care (Bettio and Plantenga, 2004; Rubery and Tavora, 2020). These findings underscore that focusing only on parental leave or cash transfers – without addressing care labour conditions and service supply – delivers limited redistribution.

Even within the realm of emergency preparedness, the limits of political consensus have become apparent. In the aftermath of the pandemic, the Spanish government proposed the creation of a National Agency to strengthen the country’s ability to respond to future health crises – an initiative that had been one of the key agreements reached across political lines during the height of the pandemic. Nevertheless, the proposal recently failed to secure parliamentary support, dealing a major blow to one of the foundational elements of the post-pandemic recovery strategy. Opposition parties criticized the plan’s institutional design, its financing, and what they perceived as an encroachment by the central government into areas of regional competence. This rejection not only weakens an essential pillar of preparedness but also illustrates the fragility of consensus in the face of politicized resistance.

Comparative analyses of post-pandemic trajectories emphasize that short electoral cycles and partisan polarization constrain long-term care system building in both Europe and Latin America (Daly, 2022; Blofield, 2023). In Europe, despite stronger institutional legacies, proposed reforms often stall under fiscal consolidation pressures; in Latin America, the problem is compounded by dependency on international funding and fragmentation across government levels. Scholars stress that durable and redistributive care systems require broad political coalitions, dedicated funding mechanisms, and inter-ministerial coordination – conditions seldom met in crisis-driven reforms (Esquivel, 2020; Razavi, 2021).

Territorial differences further complicate the implementation of national policy frameworks. In Catalonia, for example, early childhood educators – particularly in the 0–3 age range – have denounced the systemic undervaluation of their labor, citing overwhelming child-to-caregiver ratios, excessive workloads, and a persistent lack of institutional recognition. Their mobilizations highlight how, even within public systems, care work continues to be

rendered invisible and undervalued, to the detriment of both caregivers and the quality of services provided.

Regional disparities are consistently documented: within-country inequalities in funding, staffing and infrastructure translate into uneven access and service quality (Bettio and Verashchagina, 2012; OECD, 2023). In Latin America, evidence from Argentina, Brazil, and Mexico shows that local fiscal capacities largely determine the sustainability of childcare and eldercare programs, deepening socio-spatial stratification (Blofield and Martínez Franconi, 2015; CEPAL, 2022). Targeted investments that prioritize underserved areas are necessary to avoid exacerbating inequalities when scaling up national programs.

Despite these tensions, some local initiatives are offering promising alternatives. In the Basque Country, the *Auzozaintza* program, developed as part of the *Hernani Burujabe* community sovereignty movement, seeks to address the needs of elderly individuals facing unwanted loneliness. By organizing care through neighborhood-based networks and a public-community governance model, the initiative not only improves physical and emotional wellbeing but also reaffirms the collective and social value of caregiving. These kinds of decentralized, embedded approaches demonstrate the potential of locally grounded solutions that are more flexible and responsive than conventional bureaucratic models. Actually, the community responses that we find out in our research offer a glimpse into alternative models of care that prioritize solidarity, reciprocity, and mutual support. While these initiatives were often improvised and localized, they demonstrate the potential of grassroots mobilization to challenge dominant paradigms of individualism and commodification.

Comparative research documents similar grassroots innovations across Latin American cities (e.g., Mexico City, Buenos Aires, Montevideo) and European localities (Barcelona, Naples, Glasgow) during the pandemic: community kitchens, neighborhood care circles, and mutual-aid networks provided essential services and helped buffer welfare shortfalls (Federici, 2020; Pérez Orozco, 2021). While these initiatives cannot substitute systemic public provision, studies find they complement state responses and sometimes catalyse institutional learning when mechanisms exist for scaling up or formalizing these practices (Tronto, 2017; UN Women, 2023).

8. Conclusion

The COVID-19 pandemic marked a pivotal moment in revealing the fragile underpinnings of our social systems. Care, long rendered invisible in

public discourse, emerged as a cornerstone of social resilience. However, the burden of this resilience fell disproportionately on women, particularly those in precarious or marginalized positions.

The experiences recounted by the participants clearly show that the impact of care does not fall exclusively on those who provide it or on those who receive it, but rather permeates the entire social fabric in which both are embedded. This recognition compels us to rethink care not as an externality of the economic and social system, but as its very foundation, as this crisis has vividly demonstrated.

The testimonies reveal that, for many of these women, the pandemic acted as a catalyst for change in the organisation of domestic, community, personal, and associative time. While some of these changes were circumstantial and linked to the period of confinement, others represented deeper transformations in the perception and management of time. The reconfiguration of social life, the strengthening of neighbourhood support networks, and the use of digital technologies gave rise to new forms of collective care — though not without tensions and inequalities. The diverse experiences of the interviewees reflect how the pandemic context opened spaces for self-care and reflection on personal limits, while at the same time exposing overload, the lack of personal time, and the challenges of reconciling responsibilities in single-mother households or in those lacking close family networks.

Consequently, a transformative perspective on care requires policies that strengthen the social and public networks sustaining it, as well as a cultural and ethical re-evaluation of our collective priorities. The pandemic revealed not only a public health emergency but also a profound crisis of meaning regarding how we relate to one another, how we sustain life, and who bears this responsibility under the most precarious conditions.

Finally, the findings of this research underscore the urgency of designing public policies that recognise the value of unpaid care work and promote its equitable redistribution between genders. It is essential to implement measures that reinforce public care systems — including the expansion and sustainability of educational, health, and long-term care services — as well as gender-sensitive labour policies such as flexible working hours, shared parental leave, and targeted economic support for households in situations of vulnerability.

For this reason, it is crucial to continue developing longitudinal analyses of the post-pandemic effects on care work, particularly in relation to changes in women's employment trajectories and mental health. Likewise, it is important to explore the community and family coping strategies that emerged during the crisis and to examine how these responses can inform the design of more resilient and equitable care models in times of emergency.

This research calls for a reconfiguration of care from both a policy and societal standpoint. It argues that addressing gender inequalities, recognizing care as a collective responsibility, and investing in public systems are not only matters of justice, but of societal sustainability. The findings also contribute to broader international debates on the future of welfare regimes and the role of care in maintaining democratic, inclusive, and equitable societies.

To fully understand and respond to the care crisis, international comparative perspectives are essential. Latin America offers instructive cases, particularly where care responsibilities have been refamilialized or privatized in response to neoliberal reforms and shrinking welfare states. In many countries, policies lacking universality have disproportionately burdened women, exacerbating inequalities in labor force participation and time use. The Uruguayan Sistema Nacional Integrado de Cuidados (SNIC) stands out as a model of integrated care policy driven by feminist advocacy and state commitment to universality. Comparative analysis with such experiences can offer Spain sustainable care models.

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12. Inequalities and Early Childhood Education and Care Policies for Children Aged 0–3 in Spain and Chile: Governance, Availability, Accessibility and Affordability

by Blanca Barco, Manuel Ángel Río Ruiz

1. Introduction¹

In recent decades, Early Childhood Education and Care (ECEC) has gained a central place in global educational policy agendas, positioning itself as a key strategy for mitigating social inequalities from early childhood. Early interventions significantly contribute to improved development outcomes for young children and their families, particularly those from disadvantaged backgrounds (Vandenbroeck, Lenaerts and Beblavy, 2018; Van Huizen and Plantenga, 2018). While such interventions can take diverse forms – ranging from parental leave to financial benefits – and may be implemented across different sectors, the highest expectations have been placed on formal ECEC services.

However, the renewed promise of social salvation through education – now placed in early childhood – faces tensions arising from persistent inequalities between social classes and groups in access to formal ECEC services (Abrassart and Bonoli, 2015; Pavolini and Van Lancker, 2018; Kulic *et al.*, 2019; Navarro-Varas and León, 2023). While these disparities have sometimes been explained by cultural differences in norms surrounding motherhood, the more widely accepted explanation — commonly referred to as the “Matthew Effect” — highlights structural limitations related to the availability and economic accessibility of services (Bonoli, Cantillon and Van Lancker, 2017). Nevertheless, there are doubts as to whether the pro-

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union’s Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

blem of unequal access to ECEC can be reduced solely to issues of supply and cost. For instance, the relationship between increased service gratuity and the achievement of universal provision remains unclear. Evidence suggests that making services free may not be sufficient to equalise their use across social classes, as shown by the unequal uptake of services specifically for children aged 0 to 3 years (hereafter ECEC03) in public systems that have implemented income-based fee structures guaranteeing free access for a large share of low-income families (Navarro-Varas, 2022).

Inequality within the 0–3 stage is one of the key issues, but it is not the only one shaping the current research agenda on ECEC03. International research has converged on the identification of several core developments and trends.

Firstly, there has been a significant expansion of provision, particularly in high-income countries. For instance, the European Social Investment Agenda has driven the unprecedented development of early childhood education over the past two decades, with a strong emphasis on education rather than merely on care (Daly and Ferragina, 2018).

Secondly, research points to the progressive recognition of the pedagogical value of ECEC03, challenging its traditional status as a purely assistential service aimed at care and work–life balance (Millei and Kallio, 2018; Moss and Mitchell, 2024; Penn, 2024). In academic, institutional and media discourse, ECEC03 has increasingly been framed in relation to social inclusion through female labour market participation and children’s future development, aligned with human capital approaches (Tronto, 2015; Wichterich, 2019; Gavin, 2019, 2022; Barco and Carrasco, 2021). However, it is also gradually being reimagined as a space for holistic learning and the development of citizenship (Hoskins *et al.*, 2021; Penn, 2024).

Thirdly, research agrees that mere participation is not enough. The impacts of ECEC03 depend not only on the quality of the services (Sylva *et al.*, 2011) but also on the meanings attributed to them (Dahlberg, Moss and Pence, 2005). In the face of widespread privatisation of ECEC03, public provision in Europe tends to show stronger quality indicators (Otero *et al.*, 2025). In contrast, in Latin America, some countries have made progress in certain quality indicators, although they have yet to establish comprehensive, nationwide quality assurance systems (Cortázar, Fiszbein and Finoli, 2024).

2. Factors for Comparison

Building on the findings outlined above, this chapter focuses on four comparative factors that either facilitate or hinder access to this level: gover-

nance, availability, accessibility, and affordability (Lazzari and Vandembroeck, 2012; Vandembroeck and Lazzari, 2014; Li *et al.*, 2014, 2017; Yerkes and Javornik, 2019; Sindhu and Gupta, 2024; Joshi *et al.*, 2025).

Governance refers to the set of rules, institutional structures, actors and intersectoral relationships that shape decision-making, the allocation of responsibilities, and coordination mechanisms within an education system (Ball, 2012; OECD, 2015; Verger *et al.*, 2016; UNESCO, 2017). In the case of ECEC03, governance becomes particularly relevant due to the historical fragmentation of this field across different sectors (education, health, social protection) and levels of management, which directly affects access conditions.

Availability refers to enrolment rates, that is, the proportion of children enrolled relative to the total number of children in the same age group. However, recent reviews recommend broadening this definition to include the types of programmes and provision — public, subsidised, or private (Brennan *et al.*, 2012), enrolment rates at local or neighbourhood level (Anjos Couto and Zákia Souza, 2022; Villar-Aldonza *et al.*, 2023), as well as enrolment among Indigenous populations, migrants, and children with additional needs (Alam, 2019; Eremenko and Unterreiner, 2023).

Accessibility seeks to identify the barriers that may include or exclude children and families during the admission process. These barriers may include language obstacles, lack of knowledge about bureaucratic procedures, waiting lists, and government-established priorities. Recent studies have shown that digitalised admission systems can pose a challenge for families lacking the necessary skills or access to internet-connected devices (Hummel *et al.*, 2023).

Affordability relates to the fees or costs that families must bear to access this level of education. It also includes “symbolic costs” where families must demonstrate belonging to a specific target group in order to be admitted. Reducing the cost of ECEC03 services tends to benefit disadvantaged families by lowering financial barriers (Penn, 2024; Stephens *et al.*, 2025).

These four factors offer an analytical framework for comparing the cases of Spain and Chile. The chapter begins with a characterisation of the governance context in which this educational level operates in both countries. It then explores points of convergence and divergence in three additional dimensions: availability, primarily assessed through enrolment rates; accessibility, mainly evaluated through the persistence of admission barriers; and affordability, understood in terms of the costs of ECEC03 services for families. This analysis draws on secondary data sources, the authors’ respective research, and the integration of qualitative and quantitative databases from both countries.

3. Comparing Spain and Chile in ECEC03

Comparing, as done here, the policies and conditions of access to ECEC03 across countries presents a methodological challenge, due to the heterogeneity of providers — public, private for-profit and non-profit — the pronounced territorial disparities in service provision and management, and varying degrees of centralisation in admission regulation and funding mechanisms. This diversity not only shapes the availability, accessibility, and affordability of ECEC03 services, but also complicates comparative analysis. It requires a situated and context-sensitive reading that accounts for both local specificities and the structural trends that underpin both systems.

3.1. Governance: Stages, Ages and Provision

The first difficulty in comparing ECEC03 lies in how each country names, defines and categorises each stage: terms such as “preschool education”, “early childhood education”, “initial education”, “educación infantil”, or “educación parvularia” are used with different meanings. In Spain, ECEC is referred to as *educación infantil* and is divided into two stages or **cycles**: the first cycle covers children aged 0–3, and the second cycle covers those aged 3–6. In Chile, ECEC is known as *educación parvularia* and is structured into three levels: *Sala Cuna* (0–2), *Nivel Medio* (2–3), and *Nivel de Transición* (3–5). The data and discussion presented for Chile focus on the first level, *Sala Cuna*.

In both countries, ECEC03 is voluntary. Nonetheless, both Spain and Chile have made notable progress in enrolment, although neither has achieved the near-universal coverage seen in the 3–6 age group.

ECEC03 in both Spain and Chile is embedded within complex institutional and policy arrangements (Adlerstein and Pardo, 2019; León *et al.*, 2022). At present, both States have regulatory frameworks in place, particularly regarding curriculum. In Spain, the main reference is the Organic Law for the Modification of the Organic Law of Education (*Ley Orgánica de Modificación de la Ley Orgánica de Educación*, LOMLOE, 2020; Vélaz *et al.*, 2020), while in Chile it is the *Bases Curriculares de Educación Parvularia* (BCEP) (MINEDUC, 2018). However, the most significant common feature in both countries is the heterogeneous provision and administration of ECEC03 settings.

In Spain, responsibility for the provision and admission procedures for ECEC03 lies with the Autonomous Communities. In some regions, local governments, either through their own regulations or by aligning with regio-

nal norms, assume responsibilities for managing ECEC03. Thus, four types of provision exist in Spain: public ownership with public management; public ownership with private management; publicly subsidised private centres; and fully private centres.

In the case of Chile, provision includes public services administered by national institutions such as the *Junta Nacional de Jardines Infantiles* (JUNJI) and Fundación Integra; publicly subsidised provision administered by these national bodies in collaboration with municipal governments or *Local Education Services* (*Servicios Locales de Educación Pública*); non-profit private centres run by universities or NGOs; and for-profit private providers. In Chile, the first three types of settings are considered part of the *public provision network* (*red de oferta pública*) (SdEP, 2025). Additionally, the first two forms of national public provision (JUNJI and Integra) receive *basal funding*, meaning their budgets depend on enrolment numbers. By contrast, publicly subsidised provision operates on a *voucher-based* funding model tied to daily attendance. These differences in provision types and financing mechanisms have been described as a “kaleidoscope” (Adlerstein and Pardo, 2019).

3.2. Availability: Enrolment Rates and Providers

Both Spain and Chile have experienced an expansion in ECEC03 enrolment. Spain is one of the EU countries with the highest enrolment rates in ECEC. Between 2010 and 2023, the number of children under the age of 3 enrolled in formal ECEC services quadrupled. Most Spanish regions now exceed the 50% enrolment threshold set by the European Child Guarantee. However, several regions still report net enrolment rates below 40%, and there is no consistent correlation between regional levels of economic development and overall ECEC enrolment (Río, Gimeno and Ortega, 2022; MEFPD, 2024; European Commission, 2025).

Chile has also undergone a significant expansion of ECEC03 since 2006, as part of President Michelle Bachelet’s agenda, resulting in the largest coverage increase in Latin America (Berlinski and Schady, 2015; OECD, 2024). However, enrolment in *Sala Cuna* declined during the COVID-19 crisis and remains low; by 2024, the enrolment rate for this level is 18.5% (SdEP, 2025).

Both countries display a diversity of providers. In Spain, the supply of public ECEC places has increased in recent years, supported by EU subsidies exclusively directed at creating public places. Nonetheless, the average percentage of children under 3 attending public centres (67.8%) remains below

the EU average (European Commission, 2025). Nearly half of all ECEC places in Spain are offered by private providers (MEFPD, 2023). There is also considerable variation in public provision across Autonomous Communities. Some regions report high enrolment rates despite over 70% of their centres – and 64% of places – being private. In contrast, others, such as Cantabria or Aragón, have lower enrolment rates but strong public provision. Public and private providers coexist under competitive interdependencies, with a wide range of publicly subsidised and unsubsidised private centres (MEFPD, 2024).

In Spain, there are four types of providers: (1) publicly owned and managed centres, (2) publicly owned but privately managed centres, (3) publicly subsidised private centres, and (4) fully private centres. The relative weight of each type in the formal ECEC03 landscape varies considerably between regions. However, the number of private providers is declining due to the economic crisis – especially following the COVID-19 pandemic – and due to growing competition from public provision, particularly with the creation of new places for 2–3-year-olds in public schools. One in four private centres has closed in the last five years (Raffo, 2025).

In Chile, the distribution of the *public provision network* (*red de oferta pública*) is as follows: 30% of enrolment in JUNJI centres; 28.1% in Fundación Integra; and 41.5% in publicly subsidised provision (run by municipalities or Local Education Services), as well as by non-profit private providers (such as universities, NGOs, religious organisations, etc.). Just 0.4% of provision corresponds to fully private providers (SdEP, 2025). Moreover, Chilean regional statistics do not disaggregate enrolment by age, but for the 0–5 age group, the highest coverage is reported in the southernmost Region of Aysén (64.8%) and the lowest in the Metropolitan Region (41.6%), located in the central zone (SdEP, 2025).

3.3. Accessibility and Admission Barriers

In Spain, almost all regional (autonomous) regulations governing admission prioritise work–family reconciliation criteria over social equity. Most Autonomous Communities give (not necessarily exclusive) priority to families in which both parents are working (León *et al.*, 2022). Vulnerable families with low incomes or experiencing unemployment generally receive lower priority than dual-income households in most regions. In Chile, by contrast, the *public provision network* applies a model of positive discrimination based on vulnerability and free access. Children and families in the lowest income quintiles, those experiencing rights violations, neurodivergent

children, or migrant families are prioritised. In contrast, private providers are not subject to regulations concerning either the selection of families or the pricing of services.

Inequalities between social classes or groups in terms of access remain an unresolved issue in both countries. In Spain, 61.9% of high-income households used formal ECEC services, compared to only 35.5% of low-income households. Over the past decade, the wide social gap in enrolment rates between families at risk of poverty and those without such risk has remained unchanged (Navarro Varas and León, 2022). In Chile, social disparities are also evident: in 2015, the ECEC03 enrolment rate among the poorest families was 23.8%, compared to 43.4% among high-income families (Ministry of Social Development, 2015).

There are also asymmetries and intercultural barriers affecting use. In Spain, for example, in Catalonia – which has the highest migrant population in the country – only 15% of foreign-national children were enrolled in early childhood education, compared to 52% of Spanish-national children (Navarro-Varas and Mayordomo, 2024). In Chile, due to the prioritisation of children in vulnerable situations, there is a high presence of children from migrant families and neurodivergent children in the public network.

In line with the diversification of enrolment drivers, gender-based barriers seem to be less prominent than before. Where such barriers do persist, they tend to be ethnified – that is, linked to specific ethnically marked groups. Socially sanctioned ideologies of traditional motherhood, which discourage external childcare, appear to have only a residual effect and are confined to very specific populations (Turienzo *et al.*, 2025). In Chile, however, these barriers appear to operate more strongly, particularly because ECEC03 is still heavily targeted at vulnerable families.

3.4. Affordability

In Spain, families can access free ECEC places only if they can prove they fall below the poverty threshold. However, more than half of families pay the full cost of ECEC places, and only around 25% benefit from free provision (Vélaz-de-Medrano *et al.*, 2020). In Chile, the *public provision network* offers free access for families. However, publicly subsidised providers must ensure sufficiently high attendance levels to secure their funding and institutional sustainability due to the voucher-based financing system (Barco, 2021).

Self-exclusion due to economic reasons is an issue in both contexts. In Spain, 52% of families who did not enroll their children reported that they

could not afford the cost of ECEC (Vélaz-de-Medrano *et al.*, 2020). Households with dual earners but low wages are frequently excluded from ECEC03 due to excessively strict eligibility criteria for financial support (Río *et al.*, 2022). In Chile, self-exclusion for economic reasons occurs among higher-income families or dual-earner couples, who opt out of the system because they are not eligible for free access and cannot justify the cost of highly selective private provision, which can reach €600 per child per month as of February 2025 (Reyes, 2025).

A wide diversity of funding mechanisms further complicates the landscape. In Spain, what families are required to pay varies significantly depending on the Autonomous Community. In Chile, the diversity lies within the *public provision network* itself: while some administrations receive fixed monthly *basal funding*, others rely on monthly *vouchers* based on child attendance (Barco, 2021).

Tab. 1 below condenses the key characteristics of both systems across the dimensions under analysis.

Tab. 1 - Key features of ECEC03 in Spain and Chile across the factors of availability, accessibility, and affordability.

Factors	Spain	Chile
Availability	High enrolment rates (~50%) in ECEC03. Significant territorial disparities in enrolment. Higher enrolment among 2–3-year-olds; lower demand under age 1. Driven by reconciliation imperatives and promises. Increased demand met by expanded provision, though not always public. Diversification of providers.	Expansion since 2006, yet universal coverage not achieved. Territorial gaps between regions and in rural/isolated areas. Diversity of providers with unequal coverage. Public Provision Network includes state-run and publicly subsidised providers (public or non-profit); selective private provision concentrated in high-income areas. Planning challenges due to multiple types of administration. Local needs mapping plays a limited role in service allocation. Link between availability and funding: voucher system discourages opening places in low-demand or high-vulnerability areas.
Accessibility	Economic barriers: self-exclusion and economic disincentives. Matthew Effect: 65% of high-income vs. 35% of low-income households enrolled. Bureaucratic	Positive discrimination in public provision for poverty, migration, neurodivergence, and rights violations. No regulation in the private

	<p>barriers: reconciliation criteria take precedence over social equity. Interethnic barriers. Gendered barriers? Traditional motherhood persists in certain groups. Scheduling barriers: private providers offer more flexible hours, which act as a competitive advantage.</p>	<p>sector. Application processes in public provision are complex and rigid (digital platforms, documents, deadlines). Self-exclusion due to negative experiences or family–schedule incompatibilities. Extreme targeting of “vulnerability” complicates universalist policy design. Differences in access criteria, place availability and user experience across providers.</p>
Affordability	<p>Shared cost between families and public authorities. Second-highest household spending on ECEC03 in the EU. Nearly 50% of families pay full fees. Only 25% benefit from free access. Lack of intermediate financial support for non-priority families. Some positive effects of income-based fee schemes.</p>	<p>Free access in the Public Provision Network. Funding tied to attendance (voucher) or guaranteed monthly basal funding for state-run centres. High costs in private sector: ~€600 per child/month by 2025 (€500 minimum wage). Lack of intermediate support for non-priority families. Labour rights for mothers with children aged 0–2.</p>

Source: authors’ own elaboration.

4. Conclusion

In conclusion, this comparison between Spain and Chile reveals that, despite their distinct institutional and contextual frameworks, both countries reproduce common patterns of inequality in access to ECEC03. The factors related to governance, availability, affordability, and accessibility hinder the fulfilment of the equity promise that underpins expansion policies in this educational stage. These findings point to the urgent need to move towards provision models that strengthen public networks, ensure fair access conditions, and acknowledge the social and cultural diversity of families.

The main points of convergence between both early childhood education systems can be summarised in two key observations. First, although both countries have expanded enrolment and diversified their range of providers, admission and actual use of services remain uneven across social classes and groups — particularly in Spain, where public provision does not guarantee the inclusion of the most vulnerable populations. Second, the public offering remains fragile. While Chile formally includes subsidised provision within

the *public provision network*, the divergence between *voucher-based* and *basal* funding models' places pressure on the continuity and sustainability of subsidised provision.

Beyond these shared challenges, both countries now face a critical shift: having advanced in enrolment coverage, they must now focus on improving the conditions for educability — that is, the quality of provision. These conditions vary significantly across the different types of childcare providers operating in both contexts. Indeed, the authors' research in Spain and Chile (Barco, 2021; Río *et al.*, 2022) raises concerns about the long-term sustainability and educational quality of ECEC03 provision.

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13. Care, Childhood, Adolescence and Ict's: a qualitative study in the cities of La Plata and Cordoba (Argentina)

by *Ileana D. Ibáñez, Juliana Huergo, M. Eugenia Rausky*

1. Introduction¹

The present study is positioned at the intersection of social research on childhood, caregiving, and digital technologies. It focuses particularly on an emerging aspect observed during fieldwork in the cities of Córdoba and La Plata, Argentina: the central role of information and communication technologies (ICTs) in children's and adolescents' cultural consumption, as well as the meanings, emotions, and tensions associated with their use, access, and appropriation by parents and caregivers. This relationship is examined through the lens of care, since ICT use often constitutes a playful-recreational practice integrated into everyday childcare strategies. While women perform routine reproductive tasks — such as washing, cooking, and cleaning — children and adolescents engage with mobile phones, computers, and tablets with varying intensity as part of their daily games and entertainment.

Consequently, caregiving practices in households incorporate «digital parental mediation activities», i.e., strategies employed by parents and other responsible adults to mediate, manage, and regulate children's interactions with digital technologies. These strategies include: (a) active mediation, involving discussion with children and adolescents about their technology use; (b) restrictions and rules regarding time spent online; and (c) various forms of supervision, such as reviewing browsing history (Mascheroni, Ponte and Jorge, 2018). The implementation of these strategies is shaped not only by

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

the characteristics of children and adolescents, including age and gender, but also by demographic factors, socio-economic status, and the digital literacy of caregivers.

This overview highlights the multiple challenges that arise in contexts where women face an overload of caregiving responsibilities and where access to ICTs is becoming increasingly widespread at younger ages -a subject of ongoing moral debate in many countries (Üzümcü and Berriman, 2025). How can caregiving practices be reconciled with children's use of technology? What challenges emerge in this context? These are among the questions addressed through an analysis of parental and caregiver practices and perceptions regarding digital technology use, and the tensions that arise in caring for children and adolescents. This qualitative study seeks to provide relevant insights into this complex phenomenon.

2. Methodology

The research is conducted in two of Argentina's most important urban agglomerates: Greater Córdoba² and Greater La Plata³ (we use the present tense because these are ongoing investigations). It is based on case studies in two neighborhoods with common features. From a territorial perspective, they are informal settlements identified as such by the Registry of Popular Neighborhoods (RENABAP).⁴ From an identity perspective, these are urban spaces with distinct ethnic marks, mainly inhabited by migrants from Peru and/or their descendants, where a strong link between identity and territory is established (Sassone and Mera, 2007). Additionally, their employment is characterized by precarious and unstable regimes, marked by high informa-

² The neighbourhood is located in the north-western part of the city of Córdoba. The first settlers arrived in 2013 after occupying land claimed by the urban developer GAMA S.A. Following various negotiations between the company and the State, the final relocation took place. Currently, around 950 families live there, mostly Peruvian migrants and their children (some born in Peru and others in Argentina). They work in a variety of activities, mainly informal and self-employed, related to construction, sewing workshops, street vending, domestic work in private homes, market vendors and odd jobs.

³ The neighbourhood is located on the border between La Plata, Berisso and Ensenada. It was formed in the mid-1990s as a result of the occupation of land belonging to the Naval Prefecture by a group of migrant families from different regions of Peru: the coast, the mountains and the jungle. Currently, there are 192 households and around 628 people registered. Of these households, 84.4% have at least one member of Peruvian nationality and 59% have children and adolescents. Employed persons are concentrated in construction (47.2% of men) and domestic service (44.6% of women) (Ortale and Rausky, 2023).

⁴ This register identifies neighbourhoods – slums and settlements – that are characterised by irregular land tenure, serious infrastructure problems and poor living conditions.

lity and very low incomes. This brief overview highlights the comparability of the cases and provides an insight into the characteristics of the living conditions of the families referred to in this study and on which we base the questions posed.

In both cases, a qualitative research approach is employed. In La Plata, observations were made in community spaces attended by children and adolescents, 11 interviews with responsible adults (mothers, fathers, and/or grandparents), and 4 interviews with key informants. In Córdoba, observations were conducted in the neighborhood, at the community dining space, and in some domestic settings; 2 group interviews with 6 women managing a neighborhood community space and caregivers (mothers and grandmothers); and 3 interviews with mothers.

3. Migration, poverty and childcare

All the individuals participating in the studies belong to the Peruvian community, which has a strong presence in La Plata and Córdoba. Peruvian international migration was stimulated by the search for citizenship rights, and the desire to enjoy a stable, high-quality social support system, as opposed to an exclusionary regime. Within this framework, Argentina emerged as a significant destination in the diaspora starting in 1994. Data from the 2022 census showed that migrants from Peru represent 8.1% of the foreign-born population, ranking fourth in importance after Paraguay (27%), Bolivia (17.5%) and Venezuela (8.4%).

When assessing their material living conditions, higher levels of poverty are observed, particularly among groups from Bolivia, Paraguay and Peru, which have the highest rates of poverty and indigence (IOM, 2019). Studies analyzing migration processes indicate that these often result in environments where childrearing and childcare practices strain the boundaries of the knowledge and values of the host country (Zelizer, 2009). Indeed, family-centered research shows that migratory movements entail adjustments, leading to a reorganization of caregiving. Moreover, trends over the past decades reveal that women have been key drivers of international migration processes (the first link in the chain), leading to ideological shifts regarding conceptions and practices of motherhood and fatherhood, as well as new forms of family organization, laden with conflicts and negotiations (Oso Casas, 2008; Vianello, 2015). These studies produced an important debate about how migratory movements can lead to adjustments in the way care responsibilities are assigned based on the intersection of categories such as social class, ethnicity, gender and age, while also showing that they can generate a particular

type of family — the transnational family — thereby contributing to the de-centring of the more traditional, nuclear and patriarchal notions that dominated its study in the social sciences during a significant part of the 20th century (Stefoni *et al.*, 2022).

In these contexts, the appropriation and use of ICTs plays a significant role. Understood as communication tools and spaces, they have made it possible to stay in touch with loved ones, weigh up the nostalgia caused by physical distance, and construct narratives and subjectivities based on a «double presence», given the possibility opened up by the digital world of «being here and there» (Melella, 2016, p. 78). Qualitative studies conducted in various countries demonstrate how women who have migrated and left behind their elderly parents and/or children, undertake diverse caregiving responsibilities facilitated by technological advancements. These technologies have enabled the maintenance of fluid caregiving relationships despite physical distance, thus supporting the consolidation of transnational families. The enactment of «practical care» — for example, through the exchange of advice and information — or «moral and/or emotional care» — reflected in efforts to maintain contact and sustain emotional ties — exemplifies this dynamic (Baldassar, 2007).

The discussion presented thus far constitutes, in our view, a possible approach to analyzing the intersections between ICTs, childcare, and migration, without claiming to be exhaustive. In Argentina, few studies have examined access to and use of these technologies among migrant populations living in conditions of poverty and vulnerability⁵. Nevertheless, a substantial body of literature addresses the impact of technological transformations on everyday life, and particularly on the experiences of children and adolescents. These studies position ICTs at the center of key questions in 21st-century social science research, particularly those concerned with understanding the processes underpinning social inequalities and their relationship to the emergence of digital technologies and the Internet (Cabello and López, 2017; Duek and Benítez Larghi, 2018; Morduchowicz, 2018; Lago Martínez, 2019; Cabello and Lago Martínez, 2023).

Recent research in Argentina highlights that digital experiences have substantially transformed the ways in which these social actors engage with

⁵ In Argentina, relevant information was provided by the Module on Access to and Use of Information and Communication Technologies (MAUTIC) of the Permanent Household Survey conducted by the National Institute of Statistics and Censuses (INDEC, 2024). In the fourth quarter of 2023, 61.0% of urban households had access to a computer (desktop, laptop, or tablet) and 93.4% had access to the internet (fixed and mobile networks). Compared to the previous year, there was an increase in internet access in households and a decrease in computer access. As for mobile phones, 90% of the Argentine population uses them. The greatest differences in ICT usage rates are found according to educational level.

technologies, to the extent that digital spaces now function as sites of expression, socialization, creativity, and identity formation (Pérez Declerq *et al.*, 2024). In many instances, exclusion from these spaces can lead to marginalization within social networks of belonging, even from early ages. Within this context, it is essential to examine forms of adult mediation: how caregivers support – or fail to support – children’s and adolescent’s engagement, the normative, moral, and affective frameworks guiding such practices, the knowledge or lack thereof informing them, and how these practices intersect with or generate tensions in caregiving.

In this regard, a preliminary analysis suggests that the intergenerational relationship is characterized by deep inequalities in terms of digital literacy, which generates a series of tensions with children and adolescents. Our fieldwork experiences, together with studies focused on this topic, indicate that these age groups often become the primary technological references within their households, while adults – particularly women responsible for caregiving – find themselves in a position of uncertainty, concern, or lack of knowledge regarding what occurs on digital platforms, the emotions these platforms elicit, or the potential risks involved (Duek and Benítez Larghi, 2018; Cabello and Alonso, 2019).

In addition, gender plays a decisive role in these dynamics, with the burden of care falling mainly on women, who, when taking on the task of ‘controlling’ or ‘accompanying’ the use of technologies, often do so as part of a care strategy, allowing the use of screens to free up time for cooking, cleaning, working, etc., rather than as a pedagogical or reflective accompaniment practice (Casablanco *et al.*, 2024). This difference also translates into unequal appropriation of technologies between women and men, even when the equipment is similar (Duek and Benítez Larghi, 2018).

In this context, institutional and media discourses addressing the use of ICTs in childhood and adolescence oscillate between a narrative that amplifies notions of «risk» or «problematic consumption» – often resulting in decontextualized and abstract interpretations – and a perspective fascinated by technological potential. In response to these polarized narratives, and guided by the literature reviewed, this paper aims to contribute to the discussion surrounding the tension between childcare and digital experiences. We adopt an approach situated in a migratory context, to which we incorporate variables such as age, gender, social class, territorial and cultural environment that permeate and condition digital practices. In this way, we consider the material, symbolic and affective conditioning factors of these social groups and understand that adult accompaniment cannot be thought of solely as ‘parental control’, but rather as a broader cultural practice linked to living conditions and available resources, both material and symbolic.

4. Results

Three particular conditions of the contexts under study can be identified to provide a situated understanding of the practices analyzed in a situated approach.

- Digital and technological accessibility (availability, quality of devices, and type of connectivity). Most households possess devices such as televisions, mobile phones, and, to a lesser extent, tablets. Television use is typically accompanied by cable or satellite services, although connectivity is often intermittent and linked to the household's ability to cover service costs. Regarding mobile phones, some households have only a single device, while others have one for each adult and/or adolescent member. Younger children do not have their own phones; instead, they use those belonging to their parents and/or siblings. Connectivity varies between households that rely exclusively on mobile data and those with access to Wi-Fi services. The quality of connectivity acts as either a facilitator or a constraint on the extent of digital engagement. Lastly, in general, these devices are described as second generation, with little memory and slow speed or poor Wi-Fi service.
- Use of time (characteristics of children's daily routines) At the end of school (single-shift schooling), children and adolescents divide their time between contributing to household chores and participating in sports or recreational activities, when families can afford it. Their schedules generally lack the densely packed extracurricular agendas (e.g., languages, sports, arts, music) common among higher socio-economic groups. Neighbourhoods often lack opportunities for entertainment, artistic or sports training, and socialization for children and adolescents. These everyday routines enable children to allocate significant amounts of time to leisure.
- Gender and domestic labor (distribution of domestic and care work among household members) Our research reveals the excessive housework that women carry out, where they face very arduous daily reproductive activities that are carried out with limited amenities: washing clothes by hand, shopping on a tight budget, travelling long distances to find the best prices and buy food, cooking and refrigerating with obsolete appliances, etc.

Based on the identification of these objective factors that characterize and shape the provision of care and attention to children, an analysis of the qualitative material collected was conducted. In this way, three transversal dimensions converge in the everyday experiences of these age groups across the various territories where the fieldwork was carried out, distinguishable

only analytically. These dimensions are analytically distinct yet interconnected in practice:

- 1) Gender and digital care: referring to a markedly gendered division of labour among adults (mothers, sisters, grandmothers/fathers, grandfathers).
- 2) Modes of control: concerning the ways in which limits, regulations, and negotiations regarding technological devices are established.
- 3) Sensible dimension of practices: encompassing affective and emotional aspects related to the use of technologies.

4.1. Gender and digital caregiving

The devices that are generally perceived by adults as problematic in terms of usage are mobile phones and/or tablets, unlike television, which is usually consumed in shared spaces where the entire family watches together. Women -mothers, sisters or grandmothers- are the ones who most problematise the excessive use of technological devices, face dilemmas in relation to the limits they should impose, and deal with control strategies. As C. explains:

When he doesn't win, he gets angry (her son), even wants to throw the phone. I remember, when he was younger, he actually threw a mobile. His father is the same because he plays pool on his phone, and when he doesn't win or when the internet cuts out, he says 'I'm going to lose,' and I see him, and he loses and throws the mobile! I tell him, I go up to him and say... 'It's just a game.' 'No, but I lose points,' tells me (C, 50 years old, mother, Córdoba).

This fragment reveals, on the one hand, that while women are the ones who set boundaries or point out conflicts in technology use, the figure of the father is equated with that of the child, exhibiting a parallel not only in playful usage but also in the transmission of a particular emotional sensitivity toward frustration and anger, a dynamic that shapes certain forms of expressivity, which we will address later. The expression «It's just a game» serves as a reminder that this is a trivial activity, intended to mitigate the emotional reactions that the game elicits in children and adolescents. Given that caregiving – both of children and other household members – typically falls primarily on women, it is to be expected that they are also the ones who take responsibility for and express concern about children's interactions with technology. In this regard, for migrant communities, technological devices, particularly mobiles, acquire an additional dimension. Through mobiles, migrant women are able to care for children who have remained in their country of origin:

I talk to my daughter (10 years old, who stayed in Peru under the care of her grandmother) every day on WhatsApp, on TikTok, we talk about school or about homework. I'm clever, and I stay on top of things. Mothers always do something to know what our children are up to, and we become friends with them because sometimes daughters don't tell everything. For example, my daughter has Instagram and she has her little pictures, and I saw a boy saying things to her, so I spoke to my stepfather to have that taken away, and she understood. That's why I stay on top of things and ask my mother not to take her out too much, there are men around and you never know (L., 31, years old, mother, La Plata).

Care is labour, but it is also love and concern. In this extract, for the mother, technology becomes an ally: to communicate, to monitor, and to be present from a distance. This type of care, in which the physical and digital worlds are in tension, is often underestimated by caregivers themselves; the skill and time women required to carry it out frequently go unrecognized.

4.2. Control methods

The ways in which each household regulates, limits, or negotiates the use of ICTs differ significantly. Although there is a shared feature, this does not amount to unregulated consumption, at least in the case of young children. The situation with adolescents represents a more complex domain to regulate, due to the specific characteristics of this stage of life course, for example, that they often have personal mobile phones, and mothers' need to stay informed about their movements around the city (whether for educational or recreational reasons). These characteristics give adolescents greater autonomy in digital consumption and time use. Below, we summarize key findings that emerged regarding this dimension:

Tab. 1 - Adult regulations in relation to ICTs

<i>Rules of Use</i>	<ul style="list-style-type: none"> • Mobiles are used only to communicate with family and to search for information for schoolwork. • Phones are not used during meals. • Only one device is used at a time. • Time limits are set for usage.
<i>Conditions of Use</i>	<ul style="list-style-type: none"> • Homework must be completed first before mobile phone use is allowed. • If school performance is good, technology use is more flexible. • Family plans around TV: choosing movies together.

- Screen time is replaced with activities of interest such as board games, ball games, etc., promoting screen-free dynamics.

Source: own elaboration.

The women interviewed report that they do not have the necessary knowledge to assess potential risks, they lack certain practical skills, and this often results in considerable frustration. Although there are numerous guides, educational campaigns aimed at parents to encourage «healthy digital habits» among children and adolescents, these do not appear to serve as a significant reference point for the population studied, indicating a limited circulation of specialized knowledge. However, some interviewees do value the curricular spaces offered in schools under the subject «Educación Sexual Integral» which explicitly addresses these issues:

I talk a lot to my children about the precautions they should take with their mobiles, about uploading photos; I don't talk to them about sex, and they tell me they learn about that at school, in ESI (a school subject whose acronym stands for Comprehensive Sexual Education), but it's hard for me, and the school helped me a lot, it saved me from that because I feel embarrassed about it (Y., 46 years old, mother, La Plata).

For other interviewees, TikTok videos or Instagram reels serve as valid sources of information whose content sparks conversations about fears and situations that move mothers and their children in everyday life.

Sometimes bad videos show up for the kids, so they tell me, 'Mom, this happened,' and today they started crying, and so I say to them, 'See, it's because that girl...' and then they themselves say, 'No, I won't go out alone anymore,' or 'I won't do that, Mom, I have to be careful with this...' I think technology helps them a little bit to learn and understand too (J., 58 years old, mother, Córdoba).

4.3. The Sensitive Dimension of Practices and Technology Use

Emotions and affectivity constitute discourses of the body (Le Breton, 2009), this symbolic framework simultaneously shapes and limits sensitivities. In this regard, an aspect that emerges from the analysis is the ambivalence present in the relationship between ICTs and childhood within the scope of caregiving practices.

On the one hand, the interviewees consider technology to be a valuable

tool for their children's learning, entertainment, and communication (and for themselves as well). However, they feel that they «do not know» or «do not understand» what children and adolescents do online, nor how to regulate those interactions. This lack of knowledge and insecurity generates a relationship of dependency on the part of caregivers:

I tell them, you know more than I do... I ask them to teach me and they say, 'Oh fine, we'll teach you, but learn it already so you won't bother us later' (J., 58 years old, mother, Córdoba).

The need to rely on their children for support in carrying out online procedures, virtual purchases, or information searches for school assignments places strain on their authority, sense of security, and confidence in establishing and maintaining the aforementioned regulations in the relationships between children and adolescents use of ICTs. They often become the technological reference points within their families. In some cases, fathers or older siblings also appear as members who «know more».

There is no doubt that children and adolescents have a curiosity and a predisposition to learn quickly, but they also tend to be trusting and unaware of potential dangers during online interactions. A key concern for caregivers involves the risks and intentions that an unknown person might have when contacting their children via social networks. For this reason, they often express a preference for certain restrictions, such as age limits for accessing apps and video games, to serve as effective barriers to access.

In the narratives an interest in learning new things clearly emerges, but they lack accessible reference points or sources of guidance to navigate the relationship between their children's physical and digital worlds.

5. Conclusions

As we have argued throughout this work, digital communication technologies hold a significant presence in socio-segregated neighborhoods of Greater Córdoba and Greater La Plata, and become embedded within daily care strategies. In contexts where the scarcity of institutional resources severely constrains the possibilities for accompaniment and the sustainment of daily care, digital devices both entertain children and adolescents and serve as useful tools for school-related tasks. Yet, beyond this «functionality», these devices become embedded in local meaning-making processes, intertwining with the affective and material dimensions of care.

Thus, the analysis revealed that, while the need to establish stricter limits

and controls over children's use of technologies is acknowledged, mothers, grandmothers, and other caregivers often lack the necessary knowledge and skills to implement them. Although expert knowledge on the 'appropriate' uses of these technologies circulates through various guides and awareness campaigns aimed at understanding these scenarios and their associated risks for children, such knowledge does not translate into clear guidance or accessible tools for families, as those analysed here. This gap between specialized knowledge and everyday practices highlights both an absence and a need to develop forms of proximate communication capable of engaging diverse audiences.

Furthermore, the study identified the absence of active public policies regulating or supporting the use of digital technologies within family life, in contrast with international experiences – such as those in countries like Australia and France – that have advanced in developing regulatory frameworks and guiding strategies. At the same time, there is a high level of adult unawareness regarding the actual use of these devices by children and adolescents, which deepens the generational gap and complicates both mediation processes and the construction of shared criteria around digital experiences.

Finally, the research findings underscore the need to design and implement public policies and multi-actor strategies that move beyond a merely restrictive or punitive logic, enabling instead proactive, situated, and culturally sensitive approaches. Such strategies should recognize the agency of children and adolescents in their use of digital technologies, while simultaneously strengthening intergenerational bonds and promoting care environments grounded in a comprehensive rights-based perspective. Ultimately, understanding the use of communication technologies within these territories cannot be separated from a broader analysis of living conditions and the concrete ways in which child-rearing and care are organized. This calls for policies that integrate the technological with the social, and that acknowledge the complexities of contemporary childhood and adolescence in contexts of inequality.

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14. Undocumented migrants' access to social rights in a dismantling welfare state

by *Anitta Kynsilehto*

1. Introduction¹

Migrant irregularity is a politically heated topic and addressed as one of the major problems of our time in most member states of the European Union as well as globally. This concern applies to states who would need to know who reside on their territory. In contemporary political discourse, this quest is often evoked within the framework of national security where the unknown is framed as a threat (e.g., Huysmans, 2006; Bello, 2020; on securitization, see for example Balzacq, 2010). However, having a clearer idea of numbers and social profiles of people present in the long-term is necessary also to design public policies that correspond to actual population living on their territory. Even more urgently than to policymakers, the concern over irregularity applies to people living in an irregular residence situation, referred to as undocumented migrants², who encounter diverse forms of exploitation and insecurity not only in their own lives but also those of their dear ones, both near and far. Not having a regular residence status renders it impossible to effectuate family reunification and it makes it extremely difficult to access social rights such as health care and education for children.

This chapter addresses the production of illegality in Finland, that is,

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

² In this chapter, I will use expressions such as 'undocumented migrants' to shorten expressions of 'people living in undocumentedness' or 'people without a regular residence status' and emphasize that in this paper, 'illegality' only refers to conditions created by administrative practices. That is, a person is never 'illegal' even if they did not have a residence permit.

those factors that contribute to people losing or not accessing a regular migration status and the consequences of this production to their access to social rights. It draws on a study commissioned by the Prime Minister's Office in Finland in 2021 (Katisko *et al.*, 2023), that sought to draw an overview of undocumentedness in the country and map those obstacles people living without a valid residence status encounter when they seek to access their social rights. As the phenomenon is practically impossible to quantify, we chose a qualitative approach for our study, combining individual and group interviews with professionals in the social and health sector in seven municipalities across the country as well as third sector actors (e.g., non-governmental organizations, religious groups), and critical document analysis. Quantitative analysis was used when trying to decipher the costs of this service provision by different municipalities and the costs they reclaimed from the National Social Security Institution (KELA). As regards the latter, these reclaimed costs were very small when reflected against funding allocated to surveillance and migration control overall.

Addressing this part of the population who reside in the country *de facto* (even if not on paper) enables understanding how inequalities are being produced not only *vis-à-vis* people unable to access and/or maintain their residence status. Beyond these people themselves and those who work with them, such a setting is likely to render even more visible disparities within a supposedly universalistic welfare state model as it highlights the importance of access to accurate information and potential moments of 'policy on the fly' (Mountz, 2010) when people seek access to their rights.

The chapter begins by tracing the genealogy of how migrant irregularity was recognized publicly in Finland, namely the relatively recent recognition of this phenomenon. This broader recognition was essential to begin to design public policies that respond to the specific needs of these people, despite the difficulties due to the heated and often demonizing political debate concerning irregularly residing persons as well as uncertainties as regards the future of the welfare state. The chapter then addresses the question of becoming irregular, named here as the 'production of illegality' (see also Kynsilehto, 2025). Addressing this issue and especially the allocation (or not) of residence permits is key to understanding why such a part of the population exists in the first place. The chapter then sketches briefly what this dismantling of the welfare state means, as a gradual development towards post-welfare state (Larner 2000; e.g., Baeten *et al.*, 2015; Kynsilehto and Alastalo, 2025) and in light of recent developments accelerating these developments in the context of Finland. In the final section, the chapter will address the issue of irregularly residing people's differential access to social rights in different parts of the country.

2. Recognizing and responding to migrant irregularity

Unlike many other countries, for example in Europe or even amongst Finland's Nordic neighboring countries Sweden and Norway – countries that Finland has traditionally sought to identify with in terms of the very construction of the welfare state, a broader recognition of the existence of migrants in irregular residence situation is relatively recent. The beginning of this discussion can be traced to the publication of the book *Paperittomat* by journalist Katja Viitanen and photographer Katja Tähjä in 2010 (Viitanen and Tähjä, 2010) and debates the book generated. Whilst the book presents people living in irregular migratory situation in countries other than Finland, it was able to open the discussion on what could be similar situations in Finland. That same year a country-wide network of civil society organizations and individuals who encounter migrants in irregular migratory situations was established. In a context where public discussion and action was practically nonexistent even among those generally supportive to people in the asylum process, the connection between the outcomes of the asylum process and becoming an irregularly residing individual, for example, was surprisingly difficult to make, let alone the situation of those who had applied and perhaps received a temporary residence permit for other reasons than international protection. Therefore, activities to support those in irregular residence situations were limited to a few civil society groups, religious communities and individuals, many of whom continue to be engaged in the issue. The network continues to operate and has expanded to bring together members across a broad spectrum of organizations ranging from formal human rights organizations to more project-based activities catering to undocumented migrants among other groups. It has become an established working environment to address issues such as changes in migration law and everyday obstacles for people living in irregularity, and to mobilize collectively when need be.

Once the phenomenon became part of a more collectively shared existence, it began to yield policy responses on municipal level and attempts to legislate nationally as well. The most commonly agreed theme has been right to healthcare, as this combines the undocumented person's health needs ranging from basic healthcare, chronic illnesses necessitating care and medication, to sexual and reproductive rights, such as maternity and pre- as well post-natal care, with public health concerns such as transmissible diseases, the Covid-19 pandemic being an obvious recent example. In 2014, the city of Helsinki was the first to provide access to healthcare for pregnant women (including post-natal care) and children under 18 years old residing irregularly in the municipality of Helsinki. This access was extended in 2017 to necessary health care for all irregularly residing individuals. In between, at

the end of the legislative term before parliamentary elections in 2015, a law was proposed for providing country-wide health care coverage for undocumented migrants and ensuing instructions to health care providers across the country, but this proposal was voted down and thus expired.

As elsewhere, migrant irregularity yields different sets of responses depending on the political orientation of the state government, municipalities and the new regional governance structure since the social and health sector reform (*soteuudistus* in Finnish) in 2023. As regards migration law, that is the most crucial dimension in the phenomenon of becoming undocumented, roughly speaking governments with conservative majority were to stress on tightening residence criteria across migration categories and ensuing detention and deportation of irregularly residing individuals, while more left-leaning governments maintained a more human-rights friendly policy orientation. During the recent past, two latest governments are illustrative of this: the government headed by Sanna Marin (2019–2023) bringing together the Social Democratic Party, the Alliance of the Left, the Greens, the Centre Party, and the Swedish People’s Party, and the government by Petteri Orpo (2023 to date), comprising the Conservative Party, the Finns Party, Christian Democrats and the Swedish People’s Party. Among other things, such as introducing and passing the law (2023) that guarantees access to health care for undocumented migrants across the country, the previous one (Marin government) launched a call for proposal for a study to address undocumented migrants’ access to social rights in Finland. Something radical in these propositions was the recognition that migrants in irregular migratory situation exist in Finland, and that they have rights they should access. The current, Orpo government pursues a restrictive migration policy and has, for example, tightened the criteria for accessing and renewing residence permits across migration categories (as of September 2024), and passed a law legalizing pushbacks in July 2024 (see, e.g., Krivonos and Kynsilehto, 2024; Krivonos and Kynsilehto, 2025), following the full closure of the border between Finland and Russia in mid-December 2023.

3. Multi-level migrant registration and the production of illegality

Registration at various levels – be it nationally allocated residence permits (for third country nationals) or notification of the right of residence (for European Union citizens and permanent residents in another EU member-state) or municipally allocated right to residence that confirms the person’s status as a ‘municipal resident’ – is important for migrants for several reasons. Municipal registration is important for accessing social rights fully,

because it is connected to residence-based social security. Different levels produce different statuses for the registered – a person can be registered as a temporary resident with a personal identification number (PIN) or as a permanent resident with a municipality of residence. Unless the person is registered as permanently living in Finland, their access to the residence-based social security system provided by municipalities is limited to special services, yet there have been cases of people who have a municipality of residence via their previous migration statuses, but they have not been able to renew their residence permits. This has produced an administrative anomaly in the Finnish context: ‘undocumented resident of the municipality’. Alongside local register offices, the permanency of residence is decided by the Social Insurance Institution of Finland, the agency in charge of state-organized welfare benefits. Hence, mere municipal registration does not suffice for accessing full social rights in the country. Firstly, local registration determines whether the person obtains permanent residency and thus has the right to access residence-based municipal welfare and other services. Secondly, the Social Insurance Institution decides if a person is eligible for national health insurance and can be issued the personal health insurance card (KELA card) as a sign of this eligibility. As a digital database on people residing in the country, the Population Information System (PIS) has also become widely used in knowledge production, including the production of population statistics since as early as 1970. From the beginning of the 1990s, the annual population census has drawn on the PIS data only. This means that what is entered or not entered into the register influences how the population is known, one example being family relations that may not have been documented according to the register requirements (Homanen and Alastalo, 2024). The register serves as the basis on which public policies are designed. Yet not everyone with personal identity code is counted as part of the residing population, but only those registered with the status of permanent residents.

Along with other research conducted in Finland (Leppäkorpi, 2011; e.g., Kynsilehto and Puumala, 2015; Puumala, 2016; Könönen, 2018; Näre, 2020; Maury, 2022; Kynsilehto and Alastalo, 2025), our commissioned study revealed how administrative system regarding residence statuses, including international protection, produces untenable, inhuman situations. Our interviewees pointed out cases they had sought to address, where the system had failed asylum seekers over and over again, and where changes in legislation and residence criteria had made it impossible for people to renew their residence permits. This was possible despite them having children born in Finland and these children being Finnish citizens. It was possible despite them having sought to fulfil and maintain the criteria for residence permit by any means they were able to, for example, by working several jobs at a time with the

hope that their input to the labour market would be formally recognized in a valid residence status.

In other words, the administrative system together with legislative changes and the ways in which this legislation is translated into praxis in the immigration administration, contributes to the production of illegality. That is, together, these processes force people into undocumentedness and to choosing between deportation, perhaps including family separation, and living in the shadows of the society.

4. Access to rights in a dismantling welfare state

Welfare state systems identified as democratic and applying universally and equally to all residents have undergone transformations because of right-wing, neoliberal policies and this has led to hybrid forms of governance that are often referred to as ‘post-welfare states’ (Larner, 2000; e.g., Baeten *et al.*, 2015). ‘Post’ does not denote a complete rupture with the past. Instead, it refers to changes in the priorities of welfare state policy and the decentralization of welfare provision to the lower government echelons and private markets. Along with this change, government becomes governance, where the state steers rather than provides welfare itself. Some researchers have interpreted that, along with these changes, the core of the Nordic welfare state has become obscured, whereas others argue that universalism has remained at the heart of the Nordic welfare state (Baeten *et al.*, 2015). Analyzing Finnish political parties’ immigration programs, policy documents and parliamentary discussions (2009–2011) concerning the nexus between migration and welfare provision, Suvi Keskinen found that the orientation fluctuated largely between welfare nationalism, welfare exclusionism, and welfare chauvinism (Keskinen, 2016). These results indicate a tendency to redefine universalism where the core of welfare provision is based on permanent residency towards a nationality-based system and assessments of cultural belonging as criteria for deservingness. These themes are actively debated between the government and opposition parties in September 2025.

In contemporary Finland, as of 2023, social benefits have been cut as regards, for example, housing allocation, unemployment benefits, and student allowances. This has been done under the pretext of avoiding further indebtedness and to encourage people to seek full-time employment more actively. However, the results have not been convincing thus far, but the contrary. Simultaneously, private sector services in health care provision are subsidized increasingly.

Our commissioned study showed how many professionals in the

municipal social services struggled with the lack of clear instructions for addressing basic needs of people living in undocumentedness. Due to this lack, and because of the diversity of situations and of the very undocumented people they encounter, some of them attested to having been compelled to create ‘policy on the fly’ (Mountz, 2010) to be able to provide services for those who come to them. Some municipalities were more familiar with providing services to undocumented persons, and they usually had well-functioning networks amongst different services, especially social work and health care professionals but also with professionals in other sectors, such as early childhood and primary education. Others referred people without a regular migration status directly to third sector, that is, to civil society organizations whom they considered best equipped to find responses to questions raised. There was also a third type of approach, according to which the municipality denied there would be anyone without a regular residence status who would seek their services. This approach sounded hardly plausible given other accounts of the diverse reasons for becoming undocumented and migrant population’s geographical dispersion, but it testified of the reluctance of the municipality to acknowledge these people as of public concern.

Examining the situation of people living in undocumentedness clearly demonstrates the failings of universalism, as their access to social rights is very limited. Moreover, the provision of care embedded in the ethos of the welfare state excludes many of those with precarious and temporary residence statuses, even if they are not residing irregularly in the literal sense of the term. Therefore, it is pivotal to continue working with these people as they can help those of us truly willing to maintain the welfare state understand where the biggest cracks to universalism may be located, and to rescue what is there to be rescued.

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Part IV
Social Stratification, Inequality Pathways
and Local Policy Challenges

15. Persistent Inequality or Increasing Class Barriers? The pattern of intergenerational class mobility in Argentina in historical perspective

by Pablo Dalle, Sandra Fachelli

1. Introduction¹

The aim of this paper is to analyze the effects of changes in the model of economic development on the pattern of intergenerational class mobility in Argentina between 1961 and 2021. The work focuses on Buenos Aires Metropolitan Area (AMBA)² which represents one third of the population of Argentina.

The case of Argentina is an interesting arena for international debates. Different from other developing and settlement countries, Argentina up to the 1930's was among the richest countries and by the 1950's it was distinguished in the Latin American context by the openness of its class structure to greater levels of upward mobility from working class origins, its wide middle classes and the integration of the urban working class (Germani, 1963; Dalle, 2018). Since the late 1960's, with ups and downs, the country exhibited stagnation and a marked decline, as compared with other developing countries.

From 1976–2002 the structural reforms included the privatization of public assets and enterprises, the de-regulation of foreign trade, the corporatization and financialization of the economy with strong foreign presence. These changes implied that greater portions of the working class fell to unemployment, informality and precarity. In this period, Argentina transitioned from

¹ This chapter was elaborated in the context of the INCAS12 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

² Buenos Aires Metropolitan Area (AMBA) encompasses the city of Buenos Aires and its surrounding municipalities.

a relatively highly integrated class structure to a more polarized one, with unprecedented levels of inequality (Dalle, 2018; Jorrat, Dalle, Fachelli and Riveiro, 2024).

Most empirical research on the pattern of intergenerational class mobility in comparative perspective, have showed certain distinctiveness of Latin American countries. They are more hierarchical than the European ones; identifying stronger association at the edges and wider social fluidity in the intermediate and the bottom zone of the class structure (Solis, 2016, p. 491). Further analyses show that these characteristics are related with higher inequalities of conditions in the class structure.

In Argentina, recent studies have focused on the role of education on intergenerational social mobility. The moderate educational expansion has not promoted social fluidity, either in an analysis by cohorts with national surveys (2003 onwards) (Jorrat and Marqués-Perales, 2023) or by periods in the long run for AMBA (1961-2017) (Jorrat, Dalle, Fachelli and Riveiro, 2024).

The studies that have explored time variations in class mobility, found a trend of constant fluidity by birth cohorts in the country's class structure in recent decades, with a slight trend of increasing rigidity among men (Jorrat and Benza, 2016). Yet, there have been few empirical studies that analyze the effects of changes in economic development in historical perspective in the pattern of intergenerational class mobility. Studies concentrated in AMBA found higher rigidities in the working class and less long distance upward mobility to the service class (Jorrat, 2000; Dalle, 2010). Dalle (2018) – with national surveys: 2003-2010 – has found that under a general trend of constant fluidity, there has been certain changes in the class mobility regime, specifically an increase in the class barriers between the working classes and the service class. In this paper, we intend to deepen analyze whether the de-industrialization led to a more hierarchical pattern of mobility or if it remained constant following the core model approach.

2. Debates on the features of mobility regime: The core model

We start from the “Core Model of Social Fluidity” approach, developed by Erikson and Goldthorpe (1992), which has been widely used to analyze the patterns of intergenerational mobility in industrial societies, particularly those with market economies and nuclear family systems. The main objective of this model was to evaluate the hypothesis of Featherman, Jones and Hauser (FJH, 1975), according to which social mobility in industrialized societies follows a common genotypic pattern, which tends to be similar in contexts with comparable economic and social structures.

The empirical design of the core model is based on topological models built «around some notion of ‘social distance’ as the crucial determinant of mobility» (Erikson and Goldthorpe, 1993, p. 122) whose main attraction is the flexibility to divide the mobility tables (built on a scheme of 7x7 classes of origin by destination) into regions where the net association or interaction between origin (parents) and destination (descent) can be mediated. The key elements that shape these matrices are determined by the relative desirability of reaching different class positions, the economic, cultural and social resource stock of the different origins, as well as the relative class barriers that an individual has to face to access the different positions according to cultural, education, and social capital (Goldthorpe *et al.*, 1987).

Based on the model of Erikson and Goldthorpe, Ishida, Müller and Ridge (1995) expanded its application in a study that included ten industrialized nations. Their main contribution was to adapt the original Erikson and Goldthorpe matrix, reformulating it into a version of 6 source classes x 6 target classes, which allowed for better adaptation to different national contexts. At the same time, they introduced methodological adjustments to adapt the model to the specific particularities of each country, without losing sight of its fundamental structure. This reformulation made it possible to assess in greater detail the differences in mobility patterns between countries with different levels of industrial development.

In later studies by Ishida and other authors, they expanded the model to countries with late industrialization processes. His 2008 work is interested in analyzing late developers’ countries and comparing experiences between nations that have had different paths of industrialization and analyzes how social mobility in countries such as Brazil, Chile, China, Japan, Korea, and Taiwan present some similarities with the patterns identified in advanced economies, but with particularities derived from institutional and cultural differences as well as the path of industrialization. Ishida and Miwa (2011) advanced in the application of the model with 6x6 mobility tables adapted to countries with more recent industrialization processes, their concern, in their terms, is the following:

It is possible that the late-industrializing nations show different mobility patterns and can be distinguished from the early-developers. We will then need to ask what the nature of the difference in social mobility patterns is and why there are differences between them (Ishida and Miwa, 2011: 4).

In a recent study, Bukodi and Goldthorpe (2018) offer an analysis of the Core Model using a British class scheme, the NS-SEC (National Statistics Socio-Economic Classification), of 7 classes, which is the classification used

since 2001 in that country. Using data from the 2014 Labour Force Survey, they find three key effects that structure intergenerational social mobility in British society. First, hierarchy effects act as a restrictive mechanism that reduces social fluidity, by decreasing the likelihood of mobility between different class positions and reinforcing permanence in the class of origin. Second, inheritance effects reinforce social immobility by increasing the concentration of individuals in the diagonal cells of the mobility matrix, reflecting the intergenerational transmission of privileges and disadvantages through differential access to education, social capital, and job opportunities. Finally, the status affinity effects partly compensate for the structural rigidity imposed by hierarchy, by facilitating mobility within the white-collar and blue-collar occupational worlds, allowing for greater relative fluidity within each domain, although without eliminating certain class boundaries between them. Although gender differences in social mobility are generally limited, statistically significant disparities are identified in specific aspects, especially in the lower upward mobility of women within traditionally masculinized occupations.

Using this class schema and the core model, Bukodi, Paskov, and Nolan (2019) investigate intergenerational class mobility in 30 European countries. Using data from the European Social Survey, the authors analyse mobility rates and gender differences in various national contexts. Their findings indicate that, although there are variations between countries, there are common patterns that reflect the influences of social and economic structures on class mobility.

3. Differences between Core model approaches for Early and Late Industrialized Countries

In the analysis of intergenerational social mobility, transition matrices are used that attempt to capture the complex dynamics of social stratification in different historical and geographical contexts. Both the model of Erikson and Goldthorpe (1992) and that of Ishida *et al.* (2008, 2011) represent two fundamental approaches for the analysis of social fluidity, when we want to compare different countries, compare the relative class structure and in particular to analyze class barriers to intergenerational social mobility. The fundamental difference between the two is that the first focuses on industrialized societies with highly structured class systems, the second broadens the perspective to countries with late industrialization, introducing variations that allow a better understanding of mobility in emerging economies.

In Erikson and Goldthorpe's model, the original mobility matrix, composed of seven class categories, captures the complexity of intergenerational

transitions through a precise differentiation between class groups (white-collar, blue-collar, rural classes, etc., which we will see more precisely in the methodological section). This model emphasizes the existence of rigid structural barriers that limit mobility, an example of which can be found in the low probability of movement between manual and non-manual sectors.

On the other hand, the approach developed by Ishida *et al.* (2008, 2011) seeks to adapt the analysis of social mobility to include societies characterized by more recent industrialization processes. Unlike the Erikson and Goldthorpe model, which assumes more rigid class structures, Ishida *et al.* recognize that in late-industrializing countries, occupational segmentation [high informality in certain countries]³ tends to be more changeable and urbanization processes more accelerated. Consequently, social mobility in these countries may be high, although not necessarily in relative terms, which may show higher class barriers.

Sectoral segmentation is another differentiating aspect between the two models. Erikson and Goldthorpe emphasize the existence of strong barriers between the agricultural and non-agricultural sectors, which restricts intergenerational mobility depending on the productive structure. Ishida *et al.* (2011) argue that in late-industrializing countries these barriers are less pronounced, given that economies have undergone recent and important structural transformations that have generated new opportunities for mobility between sectors. In this sense, the model of Ishida *et al.* (2011) reflects greater flexibility in intergenerational mobility, although it admits the constraints imposed by the class hierarchy.

Finally, both models agree that social mobility follows structured patterns determined by social stratification. However, while Erikson and Goldthorpe highlight the persistence of rigid barriers that restrict mobility in societies with more consolidated class structures, Ishida *et al.* suggests that, in societies involved in processes of social change, these barriers may be more permeable, driven by educational expansion, the growth of the tertiary sector and the dualization of the labor market: on the one hand, the expansion of the salaried occupation of skilled service occupations and the growth of informal employment.

From a comparative perspective, the fundamental difference between the two models lies in the relationship between social mobility and socio-economic development. While Erikson and Goldthorpe analyse mobility in a context of structural stability, where the hierarchisation of classes has already been consolidated, Ishida *et al.* (2011) study societies in transition, where occupational and educational structures are still in the process of change.

³ Element added by the authors.

Therefore, both approaches provide valuable analytical tools for the study of intergenerational social mobility in global capitalism, but they must be applied considering the particularities of the context in which they are used. Ultimately, social mobility continues to be conditioned by class structure, institutional barriers, and economic opportunities.

Based on the international literature on the potential of the core model to study the social mobility regime, we propose to test several hypotheses, namely:

1) Argentina's exceptionality in terms of its development trajectory may lead to the pattern of intergenerational class mobility not being in line with the Core findings of the E&G Model (1992) designed for industrialized nations or even with the Core Model of Ishida *et al.* (2008, 2011), adapted to include late industrialized countries. We propose to investigate whether the ideas expressed in the postulates called "Argentine Paradox" or "Reversal of Development" are fulfilled when applying the Core Model.

2) If, on the other hand, Argentina conforms to international parameters, as it falls within international standards as a market economy and nuclear family, we postulate that the Core Model of Ishida and Miwa (2011) would fit better than the Core Model of Erikson and Goldthorpe (1992), given that the characteristics of Argentina's class structure are more in line with the countries studied by I&M.

3) Regarding time variation, following Ishida and Miwa (2011) class barriers might be more permeable due to educational expansion, the growth of the tertiary sector, and the restructuring of the labor market.

4. Data and methodological strategy

The study was based on a recompilation and homogenization of 14 surveys between 1960 and 2021. Some surveys were performed within the AMBA until 2002 and also a selection of this region was used in national samples. All were stratified random samplings in several stages and all were carried out within academic settings. A total of 14,485 cases were taken into account: 9,079 men and 5,406 women.

We consider five survey periods for men: 1) 1961; 2) 1969; 3) 1995-2005; 4) 2006-2015; 4) 2016-2021; and four for women: 1) 1961; 2) 1995-2005; 3) 2006-2015; 4) 2016-2021⁴.

We use an EGP 5-class scheme: 1) I+II, 2) IIIab, 3) IVab, 4) V+VI, and 5) IVc+VIIab. Topological models as the Core Model proposed by Erikson

⁴ In the 1969 survey, women cannot be identified in the data.

and Goldthorpe (1992) and Ishida and Miwa (2011) have been applied to identify changes, if any, in the class barriers and fluidity of the mobility regime in AMBA (Argentina) in historical perspective.

We adapted the model to 5x5 tables where we dropped the Sector matrix, given that we use urban data and the presence of farmers and rural workers in the destine distributions drops markedly. However, we follow the “classical” proposal of E&G, particularly the procedures considered by Bukodi, Goldthorpe and Kuha (2017), where they eliminated the “sector” presence in their study, limited to Great Britain.

Finally, our approach will follow Vallet (2004), who compares Constant Association and Uniform Difference models, by themselves and for versions of Constant Association and Uniform difference, which includes core model parameters, for men and women.

5. Adaptation of the Matrices used in Erikson and Goldthorpe (1992) and Ishida *et al.* (2008, 2011) for 5x5 mobility tables

As we have mentioned, the two approaches analysed provide valuable analytical tools for the study of intergenerational class mobility, but they are adapted to different contexts, the first to industrialised countries, and the second seeks a flexibility that allows countries with different levels of development to be incorporated. In both cases, it is understood that class structure, institutional barriers, and economic opportunities impose restrictions on mobility, however, both analyses allow us to identify where the main nuclei of brake and propulsion of social mobility are located.

Each matrix of Erikson and Goldthorpe (1992) reflects different dimensions of mobility, assigning values to each class transition according to the structural effects that influence social fluidity. The main elements analysed are:

Hierarchy Effects (H1 and H2): include H1: Propensity for vertical mobility between classes, and H2: Long-distance vertical mobility (i.e., broader class changes).

Inheritance Effects (IN1, IN2, IN3) include: IN1: Probability of staying in the same class; IN2: Retention within the petty bourgeoisie and class I+II and IN3: Propensity to immobility within class IVc.

Sector (SE): Difficulties in mobility between occupational sectors, especially between the agricultural and non-agricultural sectors.

Affinity Effects (AF1, AF2), including: AF1: Low propensity to exchange between classes I+II and VIIb and AF2: Greater mobility within contiguous classes, but with restrictions on mobility between the manual and non-manual sectors.

We adapt these matrices to 5x5. In this sense Hierarchy 1 and 2 are maintained, also Inheritance 1 and 2, but Inheritance 3 is eliminated because we do not have rural classes. The SE matrix is also removed, for the same reason. We keep Affinity 2, which is the positive affinity, and we discard AF1 because it measures disaffinity with a rural class that we don't have in our data.

In the case of Ishida, we do the same. We use the 6x6 matrices applied by Ishida *et al.* (2008) and also applied in Ishida and Miwa (2011). We show the same process transforming the matrices to 5x5.

In terms of I&M the core model is composed of three different effects representing the association. The first is an inheritance effect which refers to the propensity for the respondents to stay in the same class. Inheritance: is the propensity of individuals to stay in their class of origin rather than to move out of it. In this case, it estimates propensity for immobility in each class: 6 matrices (in our case 5).

The second is a hierarchy effect and is represented by two effect matrices that capture the barriers to mobility between three hierarchical divisions in the class structure, in our case 2, because we reduce the matrix to 5x5: Hierarchy 1: it intends to divide six classes into three hierarchical levels by separating the professional managerial class (I+II) at the top and the non-skilled working class (VIIa) at the bottom of the hierarchy. The third level is in the middle, which includes Ivc+VIIb, which we do not use. Hierarchy 2: Long distance vertical mobility. In our adaptation, we cannot capture the asymmetry of mobility between farming class and service class.

Finally, there are 2 effects of Positive affinity: AF2A: captures the relatively easy flow of individuals between particular classes: between the professional managerial class and the routine non-manual class, as forming a "white-collar block". AF2 B matrix captures movement involving: the two propertied classes (I+II & IVab & Ivc+VIIb, partially in our case the Ivc) and the two working classes (V+VI and VII). In the AMBA region, the origin distribution of VII+Ivc is primarily composed of urban non-skilled workers (VIIa). Therefore, we have chosen to consider only the affinity between the two working classes. If we were to account for mobility between the propertied classes, we would overrepresent movements between VIIa and IVab, not proposed by Ishida & Miwa (2011).

6. Exploring the pattern of intergenerational class mobility

Has there been changes in the underlying mobility regime, in both the general level and the structure of the association between origins and destinations? We follow Vallet 's (2004) analytical approach.

Table 1 shows OD-P models' results for men. Beginning our analysis, the model of Constant Social Fluidity (CnSF), which imposes temporal invariance on all odds ratio in the mobility table, has a considerable potential for describing the mobility regimen on Buenos Aires Metropolitan Area between 1961 and 2021.

Tab. 1 – Goodness of fit of log-linear models to 5x5 mobility tables. Men aged 25 to 65, Buenos Aires Metropolitan Area (n=9047)

<i>Models OD-P</i>	<i>L2</i>	<i>df</i>	<i>DI</i>	<i>BIC</i>	<i>Assoc. Expl.</i>	<i>Chi2*</i>	<i>Model</i>
1. Conditional Independence	1268	80	14.3	538.9			
2. Constant Social Fluidity	99	64	3.4	484.3	92.2		
3. Unidiff	96.2	60	4.0	-450.6	92.4	0.5918	2 vs. 3
Periods	1961	1969	1995-2005	2006-2015	2016-2021		
Unidiff Parameters	1	0.95	0.875	0.88	0.968		
4. CSF Core Model (E&G)	275.3	75	6.9	-408.2	78.3		
5. Unidiff Core Model (E&G)	271.9	71	6.8	-375.2	78.6	0.493	4 vs. 5
Periods	1961	1969		2006-2015	2016-2021		
Unidiff Parameters	1	0.85	0.852	0.834	0.844		
6. CSF Core Model (I&M)	128.3	71	3.9	-518.8	89.9	0,00	4 vs. 6
7. Unidiff Core Model (I&M)	126.2	67	3.9	-484.5	90	0.717	6 vs. 7
Periods	1961	1969	1995-2002	2003-2008	2010-2015		
Unidiff Parameters	1	0.957	0.859	0.864	0.927		

* *Dif L2 and Dif df*

Source: own elaboration.

The Unidiff model, which estimates four supplementary parameters to capture the general strength of the origin-destination association to vary over

time, it does not improve the goodness of fit of the CsSF model. Moreover, the estimated Unidiff parameters has not changed substantially over the five periods; they decline in the intermediate periods 1995-2005 and 2006-2015, increasing social fluidity, but then, move up in the last period. Overall, there is not a clear trend of change in social fluidity.

Then, we examine whether there has been a change not only in the level of social fluidity but also in the pattern of intergenerational class mobility. First, we fit the classic model of core social fluidity (Erikson and Goldthorpe, 1992, p. 121-140) adapted to 5x5 tables of AMBA, that as we have seen, summarizes the overall pattern of association into five parameters. CnSF Core model (E&G) does not fit better than its counterpart (CnSF). The BIC of the latter is better and it misclassified 6.9% of the sample. To identify a temporal trend, Unidiff core model (E&G) also does not fit better.

Instead, CnSF Core model (I&M) fits better according to BIC. When we compare the CnSF by Chi2 test of the difference of L2, CnSF adds significative association explained. However, following a parsimony criterion, CnSF Core model I&M should be considered. It misclassifies only 3.4% of the total sample and improves 92.2% the association explained from the baseline model: the perfect fluidity at each period. UNIDIFF core model (I&M) does not improve the goodness of fit.

Table 2 shows OD-P models' results for women. The model of Constant Social Fluidity (CnSF) also has a considerable potential for describing the mobility regimen on Buenos Aires Metropolitan Area between 1961 and 2021. Also, among women, Unidiff model, does not improve the goodness of fit of the CsSF model with a substantial stability of the parameters over the four periods.

When we examine whether there has been a change not only in the level of social fluidity but also in the pattern of intergenerational class mobility through the classic (E&G) model of core social fluidity, we observe that it does not fit better than its counterpart (CnSF). The BIC is worse and it misclassified 6.9% of the sample. To identify a temporal trend, Unidiff core model (E&G) also does not fit better.

Instead, CnSF Core model (I&M) fits better according to BIC. It misclassifies only 4.1% of the total sample and improves 89.2% the association explained from the baseline model. Either among men and women, UNIDIFF core model (I&M) does not improve the goodness of fit.

To sum up, either among men and women when comparing more parsimonious models, Ishida & Miwa matrices fit better than E&G (in all values of Dissimilarity Index, Explained Association, Test L^2 as well as BIC).

Table 2 – Goodness of fit of log-lineal models to 5x5 mobility tables. Women aged 25 to 65, Buenos Aires Metropolitan Area (n=5.406)

Models OD-P	L2	df	DI	BIC	Assoc. Expl.	Chi2*	Model
1. Conditional Independence	832.2	64	13.7	282.1			
2. Constant Social Fluidity	83.5	48	4	-329.1	90		
3. Unidiff	83.3	45	4	-303.4	90	0.978	2 vs. 3
Periods	1961	1995-2005	2006-2015	2016-2021			
Unidiff Parameters	1	0.962	0.985	0.999			
4. CSF Core Model (E&G)	143.1	59	5.5	-364	82.8		
5. Unidiff Core Model (E&G)	142.8	56	5.5	-338.6	82.8	0.96	4 vs. 5
Periods	1961	1995-2005	2006-2015	2016-2021			
Unidiff Parameters	1	0.982	0.998	0.941			
6. CSF Core Model (I&M)	89.4	55	4.1	-383.4	89.2	0.552	6 vs. 2
7. Unidiff Core Model (I&M)	88.9	52	4.1	-358	89.3	0.919	7 vs. 6
Periods	1961	1995-2005	2006-2015	2016-2021			
Unidiff Parameter	1	0.911	0.937	0.969			

* *Dif L2 and Dif df*

Source: own elaboration.

With respect to parameters of the CnSF core model (I&M) (Figure 1), inheritance in the service class (IN1) shows the higher value for both men and women. It is higher among women, indicating that women born in service class have 4.4 chances to remain in their origin class than to move to another class, and these chances are 3.8 for men. The inheritance in the Routine non-manual class is also high, especially among men: 2.8. We can add that Affinity 1, shows a high affinity in “White-collar block” among men 2.4 and women: 2.1 (AF2A). Overall, we could think that the high inherence and the exchange in these classes a represent a type of social closure of higher classes that prevent upward mobility from working classes. HI1 and HI2 indicate barriers in vertical mobility, that are both statically significant among men. For women H2 indicate higher class barriers to long distance vertical mobility, H2 for women is not significant. The affinity between working classes is also important to be considered in both sexes (AF2B).

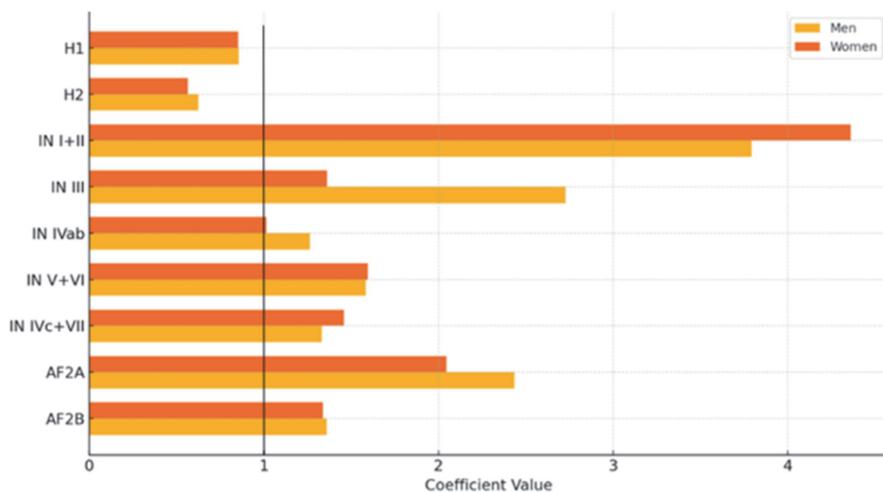


Fig. 1 - Parameters of CnSF Core Model Ishida y Miwa for men and women
 Source: own elaboration.

Moving on to contrast the hypotheses, based on the observed patterns we must refute the first hypothesis, insofar as we have found that both the core model of E&G and I&M can be adjusted to the Argentine case, showing that it is a mobility regime common to that of capitalist countries. We observe similarities in terms of the behaviour of barriers and areas of propensity for social mobility, although the values have small variations.

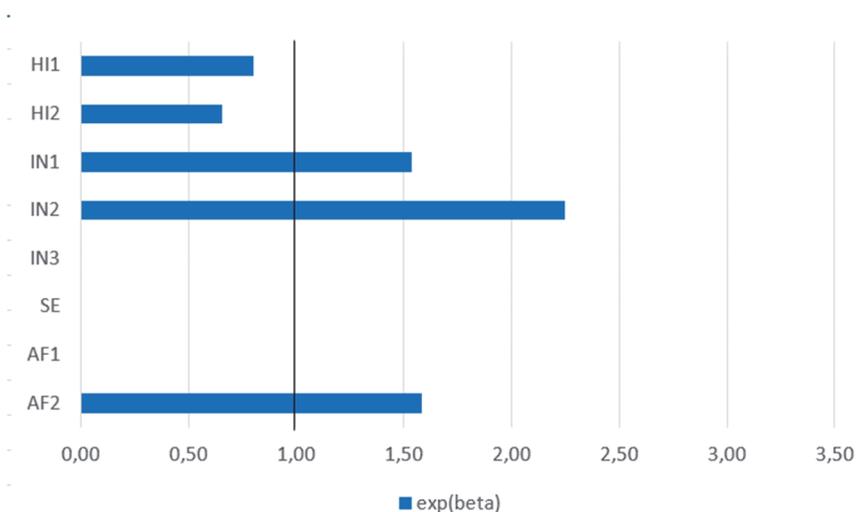


Fig. 2 - Core Model England and France Erikson and Goldthorpe (1993)
 Source: *The Constant Flux* (1993) p. 135. We eliminate 3 matrices.

Figure 2 shows the Core Model designed by E&G (and adjusted to our 5x5 tables) to test similar behaviors in industrialized countries.

Therefore, class barriers have a similar pattern, which leads us to discard the hypothesis that Argentina would be an atypical country in its intergenerational mobility regime. However, it should be noted that the goodness of fit is substantially lower than the model applied for England and France, which is considered the “universal” guideline for subsequent evaluations in different countries and in different historical periods.

Regarding the second hypothesis, we have observed that Ishida *et al.* approach for Core model fits better than the one by E&G. The Regime of class mobility of the Buenos Aires Metropolitan Area seems to be quite close to those of late industrialize countries. In comparison with the E&G core model, the I&M core model considers a) propensity for immobility in each class, and b) differentiate two positive affinities, i. between non-manual classes, forming a “white-collar block” (I+II and III) and ii. between the property classes (I+II and IVab) and the two working classes (V+VI and VII).

It should be noted that, while the goodness of fit of the I&M core model for the AMBA is acceptable, it is nevertheless far from satisfactory. This underscores the need to further investigate a national variant of the core model, as has been done in studies of other countries (Breen, 2004; Ishida, 2008).

Concerning, the third hypothesis, the exploration of changing parameters over periods does not allow us to support that class barriers have reduced as Ishida and Miwa predicted for late industrialize countries. It also does not allow us to observe that class barriers increased as observed in previous studies in Argentina based on birth cohorts and a different approach: Goodman-Hout model (Dalle, 2018). As CnSF Core Model (I&M) fits better than UNIDIFF Core Model (I&M), it reflects non-substantially changes on the regime of class mobility over time. However, in comparison with most countries that exhibits a trend of increasing social fluidity across periods (Breen, 2004; Breen and Müller, 2019), the case of Argentina shows that this trend towards the openness of the class structure does not occur in a context of a long run stagnation and relative decline, as compared with other developing countries.

In the final reflections, we would discuss the possible causes of the constant fluidity trend in the long run and we try to think about public policies that could contribute to generate some changes, in lighth of contribution of international literature around this topic.

7. Conclusions

The aim of this paper was to analyze the effects of the changes in the model of economic development on the pattern of intergenerational class mobility in Buenos Aires Metropolitan Area since 1961 to 2021. We adapted the EGP model to 5x5 tables where we dropped the Sector matrix (rural IVc), given that when using urban data, the presence of farmers and rural workers decreases significantly. Then, we use an EGP 5-class scheme in order to apply topological models as the Core Model proposed by Erikson and Goldthorpe (1992) and Ishida and Miwa (2011). Based on that models we have identified that Argentina hasn't have an atypical pattern of class mobility, its patterns fits with as those countries with market economy and nuclear family, consequently the first hypothesis is not corroborated.

The Ishida and Miwa model adjust better, then the hypothesis 2 is corroborated. On the other hand, we corroborate hypothesis 3 in its first part, since we will find the highest-class barriers in H1 (vertical mobility) and H2 (long distance vertical mobility) and in the inheritance matrices, with the inheritance of class I+II of both sexes being the highest and that of class III of males the second most important. We also found the two predicted positive affinity effects, with AF2A showing the most flow among the white-collars. On the other hand, with respect to temporal variation, the findings reflect a constancy, which does not allow changes over time to be observed.

However, these observed parameters are maintained over time, so we would not see second part of the hypothesis 3 corroborated, so we can verify a constancy, persistence and maintenance of the barriers and consequently of the constant inequality of opportunities for intergenerational social mobility. How to interpret this pattern? What socio-structural factors are at the base of this pattern of perishing inequality?

i. First, it is necessary to consider the regressive changes in the class structure, with a tendency towards greater income inequality and job insecurity, patterns contrary to greater social fluidity (Dalle, 2018).

ii. Second, the low level of educational expansion was insufficient to encourage greater social fluidity, neither through equalization nor attenuation via a greater compositional effect of higher education graduates (Jorrat, Dalle, Fachelli and Riveiro, 2024).

On the contrary, the evolution of the Argentine economy in the long term is a reflection of a combination of structural, political and historical factors that have prevented the consolidation of sustained development. Although the country has shown periods of growth and recovery (1990-1994; 1995-1998; 2003-2008), its economic history continues to be marked by difficulty of maintaining a stable long-term trajectory.

Argentina must address fundamental issues related to its productive structure, its institutional framework and its development model. A comparison with other emerging and developed economies reinforces the idea that the country is in a process of recurrent crises and relative stagnation, with persistent obstacles that need to be overcome through coherent public policies and long-term strategies. To achieve sustainable and inclusive growth, it is essential to implement progressive fiscal policies that ensure fair taxation based on income levels, as well as redistributive public policies that prioritize social equity and access to basic services.

7.1. Factors in the intergenerational reproduction of inequalities and the drivers of class openness

In their analysis, Bukodi and Golthorpe (2018) include education and reproduce classical analyses in order to examine how education influences opportunities for intergenerational mobility and argue that, while education is an important factor, it is not the only determinant of social mobility. They highlight the need to consider other factors for understanding the reproduction of class inequalities.

- Access to education: Upper-class families can provide better educational resources, perpetuating intergenerational advantage.
- Social networks and social capital: The class of origin influences the connections that a person can take advantage of to access better jobs and opportunities.
- Transmission of values and aspirations: Families influence the expectations of their children, limiting or broadening their vision of what they can achieve in terms of social mobility.

And, of course, all this weakens the meritocratic ideal, given that access to better class positions (for a part of society) does not depend only on individual talent or effort, but on the resources inherited from the family of origin.

However, it should be noted that Brand and Xie (2010) showed that students from disadvantaged family backgrounds derive greater benefits from university education compared to those from privileged backgrounds, suggesting that reforms aimed at increasing access for disadvantaged students could significantly improve overall social welfare, an idea also expressed by Hout (2020). In the same vein, Grusky *et al.* (2019) advocate affirmative action based on social classes, under the moral argument that the academic advantages of students from more advantaged backgrounds derive largely from their parents' surplus resources, and should therefore be discounted in admissions processes.

Going beyond education, we believe that the important thing is to find policies that allow us to get out of the vicious circle of the reproduction of inequalities, as Fachelli *et al.* (2025) call it, the feedback between structural changes and (non) relative changes in social mobility processes in Latin American societies. As Wei and Xie (2025) show that family resources play a decisive role in children's educational outcomes through various channels – such as academic expectations, neighborhood contexts, extracurricular activities, and tutoring – and emphasize that these mechanisms are highly resistant to external interventions, since families with greater economic advantages tend to find alternatives when existing options are restricted; consequently, policies aimed at transforming the structure of social stratification and fostering mobility must take into account the resilience of these family strategies.

Then, what are the public policies needed to deal with the situation? Following Bukodi and Goldthorpe (2018) to increase social mobility, it is not enough to improve education, but it is also necessary to reduce the structural barriers imposed by the class hierarchy. In Argentina, these policies would consist of generating processes of sustained economic growth that imply the expansion of occupational opportunities (room at the top), sustaining over time policies of progressive redistribution of income, substantially improving housing and habitat in working-class neighborhoods. These are policies of democratization of welfare that Argentina set aside in 1955 after the coup d'état and especially since the 1976-1983 Dictatorship, with the dismantling of Industrialization by Import Substitution and the recurrent policies of adjustment to social welfare institutions (health and public education, housing programs and public infrastructure).

Although the country has a public and free higher education system that favors high rates of entry into the system, the graduation rate is low in international comparative terms with both European and some Latin American countries, especially for the working classes (Fachelli *et al.*, 2013). Previous studies suggest that policies to improve secondary school and support programs for university students during their academic careers through workshops that reinforce academic writing and mathematics may be key to counteracting high dropout rates, especially in the early years (Boniolo, Dalle and Lemos, 2025). A higher volume of university graduates can promote social fluency via the compositional effect, insofar as university degrees diminish the effect of social class origin on the achieved status (Hout, 1984; Vallet, 2004). Likewise, scholarship policies for students from low and lower-middle socioeconomic backgrounds and for subaltern ethnic groups can generate equalization effects on educational attainment, which can then result in a catalyst for greater social fluidity. In terms of education, Argentina has an important way to go in expanding the volume of higher education graduates.

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16. Transitions from secondary to higher education in Argentina. Social Inequality Guidelines for Regional Education Policy Formulation

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1. Introduction¹

Argentina has achieved the universalization of primary education, and the current educational objective is to expand achievement at the secondary level and at the same time consolidate the continuity of studies at the higher level. In this context, National Education Law 26.206, approved in 2006, extended the compulsory nature of formal education until the end of secondary school, in line with UNESCO recommendations. This law was accompanied by national and provincial social policies, such as the curricular reform of the New Secondary School (2009), the mandatory schooling for beneficiaries of the Universal Child Allowance (2009) and the distribution of netbooks to public high school students through the Connect Equality Program (Narodowski and Andrada, 2015) and previously, the Technical and Professional Education Law No. 26,058 passed in 2005.

EPH data show that, during the period 2003-2021, the education system expanded. The proportion of children and adolescents out of school fell by six percentage points and the proportion of children enrolled in secondary school increased by fourteen percentage points. In 2021, 92% of adolescents between the ages of 13 and 17 were enrolled at the secondary level. The expansion of access to the secondary level had its correlation in the completion of the level. The proportion of young people between 25 and 29 years of age who completed secondary school increased by fourteen percentage points.

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union's Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

By 2021, 72% of this group had graduated from the level. The information analyzed suggests that the proportion of young people who accessed the secondary level degree in the adult modality and through educational completion programs increased (CIPEC, 2022)

Although these education policies and laws contributed to expanding school enrollment, challenges still persist (Krüger, 2016). Low retention levels, especially in the first year of secondary school, and academic achievement problems have resulted in low graduation rates, disproportionately affecting students from lower-income households (García de Fanelli, 2014) in conjunction with the problems of dropout and school lag for the working classes (Boniolo and Najmias, 2018). Likewise, this panorama is differential depending on the type of school where young people go since, for example, the commercial and technical modalities - with respect to high schools - have higher rates of repetition and dropout (Austral, 2019) although, however, the technical modality substantially improves the obtaining of quality occupational positions and access to higher education for people with working-class origins (Sosa and Lemos, 2025; Lemos, 2025). With this situation, several studies have characterized the Argentine education system as segmented (Braslavsky, 1990), fragmented (Kessler, 2002; Tiramonti, 2004) or segregatory (Veleda, 2009).

Despite the expansion of secondary education in recent decades, more recent research (Jorrat, 2010) shows that inequalities in achievement according to social origin have remained constant. In addition, the mother's educational level has a great influence on the academic performance of the children, especially in the graduation of secondary school. Studies show that women have higher high school graduation rates, which is partly attributed to their lower participation in the labor market at an early age compared to men (García de Fanelli, 2014).

Assessments have evidenced significant gaps in learning, contributing to inequalities in graduation rates (Ministry of Education, 2022). In 2022, the number of secondary school graduates showed significant differences according to the region of the country. According to the 2021 "Educational Indicators Report", the overall graduation rate improved 9 points between 2011 and 2018, with technical education benefiting the most, with an increase of 10 points in the same period. However, if we look at term graduation, which is defined as the percentage of students who graduate without repeating any year, only 29% of students manage to finish high school on time, while 25% do so with repetitions or delays.

The transition from secondary to higher education in Argentina presents significant challenges in terms of equity and educational continuity. While high school graduation rates have improved over the past decade – from 45%

in 2011 to 54% in 2021 – this expansion has not proportionately translated into greater access to higher education. These data show that, beyond the quantitative expansion of the education system, structural barriers persist that condition the transition between levels, reproducing inequalities of origin in access to higher education.

Argentina experienced a notable growth in its university enrollment during the twentieth century, initially standing out in the Latin American context. While in 1950 the country registered 7.7 university students per 10,000 inhabitants – one of the highest rates in the world at that time – other countries in the region such as Brazil and Mexico were just beginning their educational expansion. This leadership was maintained during the following decades, thanks to policies of free and unrestricted access that contrasted with the more elitist systems predominant in the region.

Compared to other Latin American countries, Argentina developed a particularly inclusive university system. By 1960, the UBA was home to 18.4% of students from popular backgrounds and 46.2% from the lower middle class, figures much higher than those of the University of Mexico (12%) or the European universities of the time. However, this model began to lose relative advantage in the 1990s, when countries such as Chile and Colombia implemented reforms that combined coverage expansion with quality assurance mechanisms.

Around 1960, Argentina stood out as a leader in Latin America in terms of educational level and quality. However, at present, coverage and performance indicators (such as the PISA tests) place it in an intermediate position in the region, this decline being attributed, in part, to the increase in poverty and social inequality between 1975 and 2002 (Rivas, 2015).

To contextualize this problem, it is relevant to analyze some educational trends. Between 1980 and 2010, the percentage of the population over 25 years of age with completed higher education (university or tertiary) grew almost fourfold, from 4.3% to 15.6%, being the educational level with the greatest expansion. Likewise, those who completed secondary school but did not continue higher education doubled (from 10.7% to 21.43%), and those with incomplete higher education also increased significantly (from 3.1% to 6.1%). In comparative terms, Argentina is lagging behind.

In 2015, only 19.9% of the population between 25 and 64 years of age had completed the higher level (ENES-PISAC), a proportion less than half that registered in developed countries and well below nations such as Spain (35.1%), although surpassing Mexico (16.3%) and Brazil (14.3%) (OECD, 2016). In the university environment, the country has a high enrollment, but its graduation rate is remarkably low (just 30%), in contrast to Chile, Brazil, and Mexico, where more than half of students complete their studies, or to

the most developed countries, where the figure exceeds 70% (CEA, 2018). (Dalle, Boniolo, Carrascosa, and Estevez Leston, 2019).

According to Fachelli, Molina Darteano and Torrents (2015, p. 20) “In Argentina, the most disadvantaged levels of the population, both in educational and occupational terms, do not have the same opportunities to access university even if they have a public policy at their service, such as the coverage of the direct costs generated by university education”. The authors suggest that indirect economic costs and subjective aspects of accompaniment should be considered to improve university graduation (2015:20).

Recent policies (2000-2023) have attempted to regain lost ground. Between 2007-2015, 37 new universities were created, 65% of which were state-run, expanding geographical coverage. However, while Argentina increased its institutional offer, countries such as Brazil, which implement massive scholarship programs (PROUNI) and Chile reformed their student financing system. These efforts explain why, according to UNESCO data, Argentina went from having the highest gross tertiary enrollment rate in the region in 2000 (45%) to being surpassed by Chile (52%) and Colombia (48%) by 2018.

The current challenges of the Argentine system become evident when examining efficiency indicators. With a graduation rate of 30%, Argentina is below the regional average (45%) and far behind countries such as Costa Rica (55%) or Cuba (60%). Recent policies, such as the Study Completion Plan (FinEs) or the Support Program for Argentine Students (PROGRESAR), have sought to improve these indicators, but with still limited results compared to the successful experiences of Uruguay with its scholarship system or Peru with its tutoring programs.

In the post-pandemic context, Argentina faces the double challenge of maintaining its tradition of free and massive higher education while improving its results. The latest measures, such as the creation of new universities in popular neighborhoods and the expansion of virtual education, seek to respond to these challenges, although important gaps persist compared to neighboring countries that have managed to combine expansion with quality, demonstrating that universal access alone does not guarantee equitable results or academic excellence.

Various studies have shown that access to higher education is strongly conditioned by structural factors that generate unequal opportunities among students. First, the socioeconomic level of the household is a key determinant of university access (Fachelli, 2009; Ariño and Llopis, 2011; Chiroleau, 2014; Torrents, 2015). Another relevant factor is the educational level of the family of origin. Classic and recent studies (Bowles and Gintis, 2002; Rahoma, 2005; García de Fanelli, 2006) point out that families with greater cultural capital not only transmit knowledge valued by the educational system,

but also promote higher academic expectations, provide better school accompaniment, and manage admission more effectively (Cerruti and Binstock, 2009; Martínez Dordella, 2011). This reproduction of cultural capital contributes to sustaining inequalities. Gender also acts as a conditioning factor. Although female participation in higher education has increased, gaps persist in the fields of study, labor insertion, and reconciliation with care tasks (Ariño and Llopis, 2011). In vulnerable contexts, young women face greater risks of interruptions due to pregnancy or family responsibilities.

2. Theoretical approach

In this research we want to model the various extra-curricular factors that impact the completion of secondary level and access to higher education in order to detect barriers to educational inequality, so that they provide inputs to think about educational policies that contribute to mitigating inequalities. Under this horizon, the studies of the theoretical current where this research is located point to three main hypotheses:

i. The first, known as the hypothesis of “increasing social selectivity”, was proposed by Mare (1980). This theory holds that the influence of social origin is stronger in the initial educational stages and decreases at the most advanced levels. Those individuals from the popular or lower middle classes who manage to achieve higher levels of education have a set of unobservable characteristics (such as skills, expectations, motivation, and family support) that allow them to compensate for the socioeconomic disadvantages compared to people from more privileged backgrounds.

ii. The second, known as the “Maximum Maintained Inequality” hypothesis, Effectively Maintained Inequality (EMI), was developed by Hout and Raftery (1993), who proposed that educational expansion incorporates social classes in sequential order from the highest to the lowest. All classes increase their relative participation in progressive levels of education, but the level of relative inequality between them in graduation from the highest level is maintained. The privileged classes are the first to benefit from the expansion of education and equity policies, leaving the popular and middle classes relegated until the saturation of demand from the upper and middle classes allows a slight reduction in the inequality gap.

iii. The above theory was questioned by Lucas (2001), who introduced the notion of “effective maintained inequality”. According to Lucas, inequality is not only manifested vertically between educational levels, but also in horizontal terms within the same level, differentiated by the quality of education and the prestige of institutions and their degrees. Thus, despite the

expansion of the educational offer, inequalities of origin are reproduced both in terms of quantity (approved levels) and educational quality.

3. Data and methods

This study employs a quantitative approach using two complementary datasets. The first is the National Survey on the Social Structure of Argentina and Public Policies during the COVID-19 Pandemic (ESAyPP/PISAC-COVID-19), a probabilistic, stratified, cluster sample of 5,239 households surveyed between October and December 2021, representative of Argentina's urban population and regions. The second is the APRENDER standardized census-based evaluation, which measures primary and secondary students' performance in Language, Mathematics, Natural Sciences, and Social Sciences, along with contextual data.

Four key variables were constructed: social class of origin (EGP scheme: Services, Intermediate, Worker; Erikson, Goldthorpe and Portocarrero, 1979), birth cohorts (to capture policy periods since the mid-20th century), home educational climate (highest parental attainment: low, middle, high), and the school infrastructure index (Ministry of Education, 2020).

The analysis combines two techniques. Marginal average effects (MAP) models estimate the influence of independent variables on secondary completion and higher education access. Multiple correspondence analysis (MCA) explores patterns in Language and Mathematics performance among final-year secondary students, mapping statistical associations between categories in social space (López Roldán and Fachelli, 2015).

4. The transition to higher education in Argentina

To analyze educational trajectories in Argentina, this paper focuses on two key moments of the educational journey: the completion of secondary education, an instance that continues to represent a significant barrier and is currently a central concern in the educational policy agenda, and access to higher education, both tertiary and university. Next, the averages of marginal effects that allow us to understand these educational transitions are presented, identifying patterns and significant differences according to independent variables introduced in the model.

Based on the analysis of a model of marginal effect averages, whose design allows comparability between groups, we work on the impact of a series of independent variables on a) the chances of completing secondary

education (among those who accessed that level) and, b) the chances of accessing higher education (among those who completed secondary school).

The results of the multivariate model show guidelines for understanding educational transitions. The general panorama tends to show greater resistance in the permeability of the higher level compared to the secondary level, however some guidelines could warn mechanisms where public policy could intervene to achieve better rates of access to higher education.

Tab. 1 - Average Marginal Effects (MSP) on Secondary Level Graduation and Access to Higher Education for People Aged 18 to 65 in Major Urban Centers, Argentina 2021

<i>Independent variables</i>	<i>Graduation from the secondary level</i>	<i>Access to the Higher level</i>
Social class of origin [Ref. Services]		
Intermediate	-.046*	-.127***
Worker	-.151***	-.186***
Sex [Ref. Women]		
Males	-.051***	-.083***
Educational climate of the home [Ref. High]		
Middle	.002+	-.226***
Low	-.099***	-.328***
Birth cohorts [Ref. 1951-1960]		
1961-1970	.026+	.075+
1971-1980	.024+	.049+
1981-1990	-.012+	.021+
1991-2001	-.084***	.027*
Region [Ref. AMBA]		
Pampas	.036+	.072*
Center	-.073***	.006+
Whose	-.108***	.040+
NOA	-.059*	.006*
NEA	-.014+	.001+
Patagonian	-.103**	.027+
Pseudo R2	.159	.196
N	3.834	2.884

p < 0,001; ** < 0.01; *p < 0.05, + Not considered

Source: Authors' elaboration based on data from ESAyPP/PISAC-Covid19 (2021).

First, the effects of the respondent's sex, in relation to previous studies (Boniolo, Dalle and Lemos, 2025), continue to show negative effects for men. Seen from its flip side, female expansion is a little greater in access to higher education than at the end of secondary school and must be analyzed with age cohorts because there is a temporal effect on the incorporation of women into educational levels over time. Boys are 5.1% less likely to finish high school and 8.1% less likely to start careers in higher institutions. In this pattern there is no notable difference in stratification in the two moments of the transition to adulthood.

Second, the effects of class origins are greater in the transition to the higher level than in the completion of compulsory education. People who come from middle-class households are 4.6% less likely to finish secondary school and this percentage increases to 12.7% in the case of access to higher education. Likewise, this trend is repeated and intensified for the working class where the percentages are 15.1% and 18.6% respectively. A similar situation arises among those who have parents with low levels of education: while the educational climate of the home is not such a determining factor in the completion of secondary school. This social background is the variable with the greatest explanatory weight of the model: people who come from households with a medium educational climate are 22.6% less likely to access higher education, while those with a low educational climate are around 32.8%.

Thirdly, the analysis of the age cohorts shows interesting results that break the patterns of inequality in the two educational events analysed in the model. The first two cohorts (1961-1970/1971-1980) show positive effects, although without tolerable statistical significance, on the expansion of education in Argentina. However, in the last two cohorts (1981-1990/1991-2001) they show different effects. While at the secondary level opportunities are dislocated and begin to show negative patterns, access to the higher level shows an opposite effect and not only maintains its expansive trend but also begins to gain statistical significance in the youngest cohort of the model. This situation would enter into dialogue with two structural situations in the region, on the one hand the consideration of the enactment of the National Education Law in 2006² and the consequent compulsory education up to the secondary level and, on the other hand, the creation of new institutions of higher education 2003-2015, especially in the Metropolitan Area of Buenos Aires and in the large cities of the country. from the beginning of the new millennium.

² This law established the compulsory nature of complete secondary education, extending the educational mandate from 5 to 18 years of age. Although this measure sought to expand inclusion and completion at the secondary level, its implementation faced great institutional, structural, and social challenges, especially in vulnerable sectors.

While in 2008 the FinEs Plan was created, this program had an impact on educational trajectories, offering a flexible alternative for young people and adults who had not completed secondary education. In turn, the increase in educational aspirations has led to greater social pressure towards the continuity of post-secondary studies. This is reinforced by the progressive certification of credentials in the labor market and by scholarship policies (such as the PROGRESAR Program, created in 2014) that have sought to reduce economic barriers to access to university.

These policies are part of a model of democratization of the university system that, although it does not focus on guaranteeing permanence and graduation, has expanded admission opportunities for relegated sectors of the higher education system and has developed accompanying policies to mitigate educational inequalities such as courses for incoming students. Likewise, courses at the introductory level for abstract readings and academic writing at the new universities provided a foundation for dealing with the recent challenges of new entrants to the higher level. Despite the favorable regulatory framework, secondary schools have experienced overcrowding processes without an adequate pedagogical structural transformation, generating phenomena of overage, repetition and dropout that especially affect the most vulnerable populations. This situation helps to understand why younger cohorts do not show substantive improvements in secondary completion indicators.

Finally, the analysis by regions again shows some contrasting effects that raise questions about the educational offer in Argentina. Regarding the metropolitan area of Buenos Aires, the area that boasts the largest educational offer in the country and the other regions tend to show negative possibilities to complete secondary school. This result must be understood taking into account that educational levels in the interior of the country are lower compared to the AMBA. Although the negative effect is transversal to these regions, the statistically significant impacts in regions such as Centro (-7.3%), Cuyo (-10.8%) and the Northeast (-1.4%) and Patagonia (-10.3%) stand out. Despite this situation, access to higher education among those who completed secondary school shows slight positive effects in all regions of the country, with considerable statistical significance in the Pampas (+7.2%) and Patagonian (2.7%).

In summary, the results show that educational transitions continue to be marked by structural inequalities associated with social origin, the educational climate of the home, gender and the region. Although policies to expand access, such as compulsory secondary education, the creation of new universities, and completion and scholarship programs, have generated more favorable conditions for certain sectors, such as the middle class, their impact

has been limited in the face of persistent exclusion. This suggests that, beyond the expansion of the education system in Argentina, comprehensive educational policies are required that articulate inclusion, permanence and quality, especially at the secondary level, to guarantee the necessary tools for the transition to the higher level, contributing to more equitable trajectories that manage to overcome obstacles at the higher level.

5. Educational stratification determinants and language and mathematics performance as indicators of inequality at the secondary level

In continuity with the analysis of educational transitions, this section explores how performance in mathematics and language in the last years of secondary school is distributed according to different social and school dimensions. Through a multiple correspondence analysis, it seeks to identify patterns of inequality associated with social origin, the educational climate of the home, gender, the region, the type of management, the environment and school infrastructure, allowing progress in the understanding of the structural conditioning factors that affect school trajectories.

First, the association between performance in Mathematics is analyzed. The graph below shows a multiple correspondence analysis. The X-axis (horizontal), which explains 54.2% of the variance, is strongly associated with the region and the management sector. The Y-axis (vertical), which accounts for 21.7%, is mainly linked to sex, the educational climate of the home and the environment (urban/rural). School infrastructure and the level of performance in Mathematics present relatively balanced contributions to both axes.

The graph presented below focuses on Mathematics showing the distribution of the categories on two axes. The X-axis (horizontal) explains 54.2% of the variance and is mainly associated with the region of residence and the management sector, while the Y-axis (vertical) explains 21.7% and relates sex, the educational climate of the home and the environment. On the other hand, the level of school infrastructure and performance oscillates between both axes, contributing almost equally. These relationships show a panorama where educational inequalities are configured according to the development and characteristics of the regional school offer and the opportunities offered by social origin.

The distribution of the categories allows us to identify four quadrants that locate different types of performance and inequalities. The quadrants on the left side show two sides of situations where the lowest performances in the area of Mathematics and a greater female presence are located. Specifically,

the lower left quadrant highlights those who have a low educational climate and attend rural schools with little infrastructure, showing the NEA region as a clear example of this situation. On the other hand, the upper space shows a better performance compared to the lower one and is mostly associated with state schools with students with a medium educational climate and regions such as NOA and Cuyo.

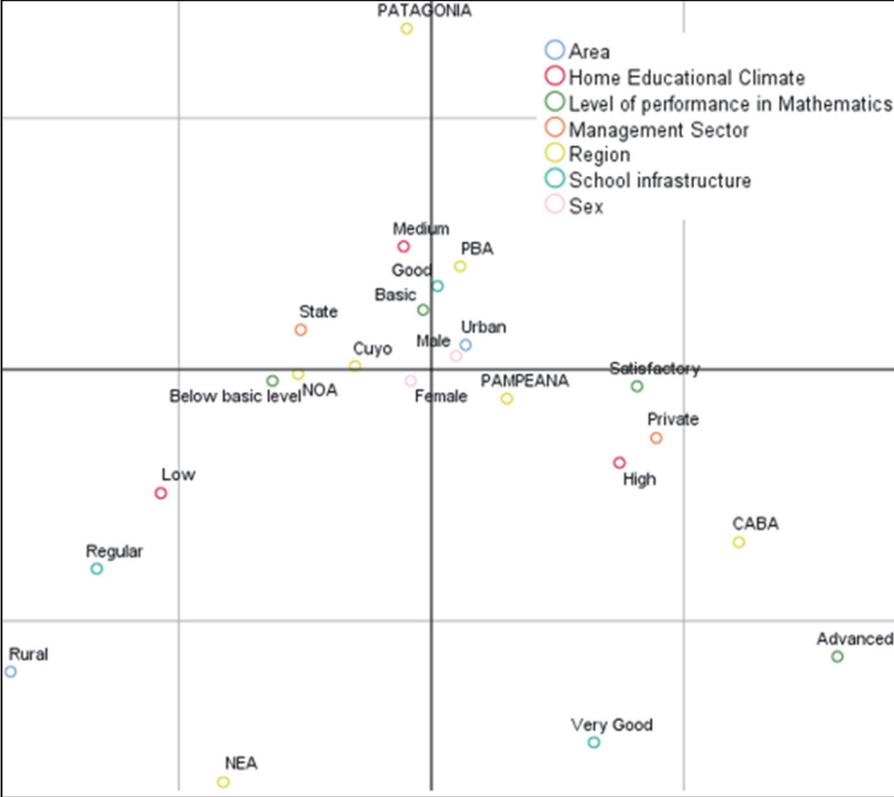


Fig. 1 - Social space of the performance in Mathematics of students in the last two years of secondary school in Argentina
 Source: Own elaboration based on Aprender 2019 (Ministry of Education).

On the other hand, on the far right we place the students with the best performance who live in urban regions. In the upper quadrant we mainly find students with a medium educational climate and who attend schools with medium infrastructure and who are mostly associated with satisfactory performance. Examples of these situations are the Province of Buenos Aires (PBA) and the regions of Patagonia and Pampeana. Finally, in the lower quadrant are mainly males with a high educational climate and advanced

performance. They usually attend private schools with high infrastructure. The main case of this situation is the City of Buenos Aires.

A clear configuration of inequalities is observed, if we focus on the NEA and NOA regions, the state sector and households with low educational climate are grouped around the lowest performances (“below the basic level” and “basic”). In contrast, regions such as CABA and Pampeana, the private sector, the urban environment, households with greater cultural capital and better school infrastructure are aligned with higher performances, particularly the “advanced” level.

This graph shows how academic performance is not distributed homogeneously but reflects the stratification of the educational system (in terms of supply) and the social conditions of origin of the students. School opportunities are conditioned by the level of territorial development, family educational capital and the institutional characteristics of the educational offer.

Graph 2 then performs the same exercise but indicating the distribution of categories with respect to the level of performance in Language. In this case, the X axis (horizontal) brings together the region, the management sector and the environment (rural/urban), explaining 47.4% of the variance, while the Y axis (vertical) explains 29.8%, mainly relating the school infrastructure and the educational origin of the student. Likewise, the categories of sex and level of performance contribute in a balanced way to both dimensions. This last guideline differs from the panorama in terms of Mathematics showing interesting gender differences.

Again, the distribution of categories shows us four groups in the quadrants that form the crossing of the axes. On the right side, we find those with unsatisfactory performance. Specifically, at the bottom end, are students with the lowest performance within rural schools and those with low infrastructure levels. Students from households with a poor educational climate stand out. An example of this situation is the NEA region. Additionally, in the remaining upper right quadrant, regions such as Cuyo and NOA are present. Here, the presence of state schools with good infrastructure and a higher number of students with a medium educational climate and basic performance in Language is notable. The Patagonian region belongs to this quadrant, although with a marked tendency toward the boundary between satisfactory and basic performances.

On the left side, we find those with the highest scores in Language. Within this section, the lower quadrant supports students with a high educational climate and advanced scores. Furthermore, they are linked to private schools with very good infrastructure, mostly urban, where the pampas region, and especially the Autonomous City of Buenos Aires (CABA), is prominent. Finally, in the upper right quadrant are students with satisfactory performance

and households with a medium educational climate. These students belong to schools with good infrastructure. The main example of this situation is the Province of Buenos Aires (PBA).

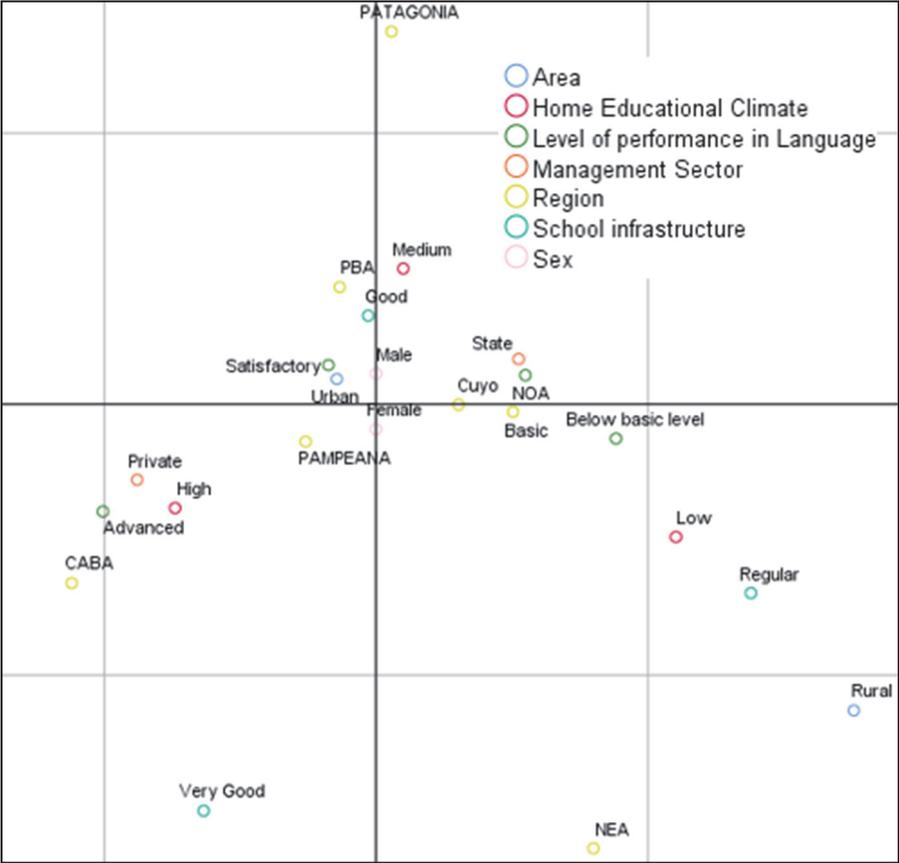


Fig. 2 - Social Space for Language Performance of Students in the Last Two Years of Secondary Education in Argentina

Source: Own elaboration based on Aprender 2019 (Ministry of Education).

The analysis of multiple correspondences for the area of Language shows a stratification of school performance associated with social origin, the characteristics of the school environment and the region of residence. These patterns reinforce the need for comprehensive policies that address both the material conditions of schools and social inequalities.

6. Conclusions

The analysis of educational transitions between secondary school and higher education in Argentina confirms that, despite regulatory advances and expansion policies, structural inequalities persist, linked to gender, social origin, the home's educational climate, and region of residence. The significant influence of social background — measured through parental occupation and family educational attainment — on both transitions offers partial support for Mare's (1980) hypothesis of increasing social selectivity, while the persistence of gaps across regions and social sectors lends stronger support to Hout and Raftery's (1993) maximum maintained inequality hypothesis. Likewise, differences in Language and Mathematics performance reveal forms of horizontal stratification consistent with Lucas's (2001) notion of effectively maintained inequality, which remain invisible when considering only infrastructure indicators (Boniolo, Dalle and Lemos, 2025).

Although policies such as the 2006 National Education Law, the FinEs Plan, the territorial expansion of the university system (2003–2015), and economic support programs like PROGRESAR (2014) have contributed to expanding opportunities, their impact is limited by Argentina's recurrent economic crises. Regional inequalities show that the massification of secondary education has not been accompanied by pedagogical transformations to ensure quality and territorial homogeneity, contributing to overage, repetition, and dropout. At the higher level, expanded access has shifted challenges toward persistence, graduation, and the quality of the educational experience, within a context of institutional segmentation and socioeconomic vulnerability.

In this scenario, it is essential to advance policies that connect expansion, inclusion, and quality, with a long-term perspective that encompasses complete trajectories from entry into the education system to graduation. This requires strengthening state investment, implementing pedagogical and personalized support mechanisms, and linking educational policies with social, transport, and safety measures that ensure the right to study under different work and territorial conditions. Only a comprehensive approach that simultaneously addresses the multiple dimensions of inequality will make it possible to build more equitable educational trajectories.

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17. Social Protection in youth social policies: towards an assessment of the last decade in Argentina

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1. Introduction¹

Over the last decade, social protection dynamics in Argentina have undergone a process of transformation marked by the coexistence of advances, setbacks, and persistent tensions surrounding inequality and social vulnerability. These movements cannot be understood solely as a result of the changes in orientation of the governmental administrations that succeeded one another in the years 2015, 2019, and 2023, but as an expression of a more complex framework of structural reconfigurations, political-cultural disputes, and processes of social fragmentation that permeate the social protection system as a whole. In this context, social policies aimed at youth from popular sectors constitute a particularly fertile ground for analyzing how the State redefines its modes of intervention and the ways in which these generate processes of constructing social inequality.

The interest of this study focuses on examining the recent transformations of Argentine social policy through the analysis of two emblematic programs directed at youth: the Program of Support for Argentine Students “Progresar” of the National Ministry of Education and the Shared Social Responsibility Program “Envión” of the Ministry of Community Development of the Province of Buenos Aires. Both constitute singular expressions of the ways in which the State’s social interventions address the youth question and the

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union’s Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

living conditions of popular sectors, although they do so from different logics and scales: while the *Envi3n* Program is organized from a territorial focus in the various municipalities of Buenos Aires, with a strong presence of the provincial government in articulation with local governments and social-community organizations, *Progresar* is a national-scope policy with a more deterritorialized nature. Their analysis and comparison therefore allow for an investigation of the different modalities presented by state interventions in the face of youth inequality and vulnerability and reflection on the transformations and meanings of social protection in the current context.

Adopting a qualitative methodological approach, this work presents progress from an ongoing line of research that analyzes the social and political-cultural production of living conditions as expressed in the rearticulations of the ways in which social policy and work in Argentina are problematized within a context of deepening inequalities. Following the guidelines of Grounded Theory (Glaser and Strauss, 1967), different qualitative techniques were combined for information collection, including conducting in-depth interviews with workers and state agents involved in the implementation of the programs; participant observations during the development of daily activities or policy events; and documentary analysis of normative, administrative, and public communication sources – laws, decrees, resolutions, and regulations – as well as official evaluations and documents prepared by state organizations. The analysis period covers the years 2015-2025, which allows for the examination of the continuities, ruptures, and reorientations that have occurred in the field of social policy during different socio-political cycles and the state responses implemented in the face of critical junctures such as the COVID-19 pandemic (Ayos, Jack and L3pez, 2022).

The article starts from the premise that social policies aimed at youth not only respond to educational, labor, or income needs, but also express specific forms of constructing the youthful subject and the State's definition of the «social question». In this regard, the aim is to analyze how the categories of youth(s), work, assistance, and vulnerability are produced and re-signified in state interventions directed toward this population, seeking to contribute a critical reading that considers the assumptions and rationalities underpinning these policies. To this end, the first section provides a reconstruction of the general trends of Argentina's social protection system during the last decades, to then – in the second section – analyze how the modalities and approaches of policies aimed at youth are reconfigured. The paper concludes with some preliminary conclusions regarding how the transformations in social protection dynamics in Argentina over the last decade affect and put pressure on the debates about the way social inequality and vulnerability are understood and intervened upon.

2. Social Protection in Argentina: tendencies, ruptures, and continuities

In the Argentine case, the configuration of the social protection system – during the second half of the 20th century – historically responded to a contributory matrix, associated with waged labor and the expansion of formal employment. This model, inherited from the social policies of the first Peronism, was supported by the articulation between social security, public health and education services, and employment policies. As Danani and Hintze (2010) point out, social protection in Argentina has been, since its origins, a field of dispute between different rationalities – universalist, assistance-based, and contributory – that express diverse ways of conceiving citizenship and the relationship between the State, labor, and welfare.

Starting in the 1990s, the neoliberal offensive in Argentina spurred a profound reconfiguration of the institutional framework of social protection. Structural adjustment policies promoted by international organizations redefined the role of the State, displacing the principle of social solidarity with that of individual responsibility. In that context of the decline of formal waged labor and rising unemployment, the logic of social security lost centrality as the organizing axis of social policy (Ayos, 2013), and the classic protection scheme was replaced by a fragmented structure, in which the neoliberal assistance-based approach of interventions grew, alongside the participation of the market in the provision of social goods and services (Danani and Hintze, 2010).

In this scenario, the new assistance policies – which were conceived as transitory responses to the emergency – were oriented towards groups defined as “lacking subjects,” who had to prove their situation of need to access the “benefits” of these policies (Grassi, 2003). Under this rationality, in turn, poverty began to be interpreted mainly as the result of personal or behavioral deficiencies, rather than as an expression of structural inequalities (Grassi, 2003). As a result, a dual system emerged, where the contributory regime increasingly restricted to formal employment coexisted with focalized assistance programs directed at the poorest sectors.

The beginning of the new millennium in Argentina, coupled with the profound social, economic, and institutional crisis of 2001, not only evidenced the limits of the neoliberal paradigm but also fostered a re-signification of the State’s role in the regulation of social life. Between 2003 and 2015, the Kirchnerist governments promoted a process of state recentralization aimed at reversing part of the effects of the previous cycle. In a context of economic recovery and employment growth, the State regained a central role in defining social policy. According to Danani *et al.* (2018), new powers and

functions were assigned to it; there, the National Social Security Administration (ANSES) became not only a space for political disputes but also an articulating axis for key ministries such as Social Development, Health, Education, and Labor. Thus, during this period, labor formalization consolidated as a central strategy for social inclusion, although the structural limitations of the labor market to absorb the entire unemployed population were recognized (Grassi, 2016). In response, interventions were developed aimed at extending protection, especially to historically excluded and vulnerable sectors, within a framework characterized by high informality and labor precariousness (Grassi, 2016). The creation of the Universal Child Allowance (AUH)², the expansion of pension coverage, and the launch of programs like Progresar constituted significant milestones of this period, marked by the expansion of rights and the social protection system.

However, the coexistence between contributory and non-contributory policies – particularly the centrality maintained by pensions in the social protection scheme, along with the expansion of income transfer programs – configured a hybrid welfare regime, in which important inequalities in access and coverage persist. This fragility set the conditions for the triumph of the “Cambiamos” alliance in 2015³, which spurred a profound reconfiguration of social protection, aimed at distancing itself from previous policies and redefining their foundations. Thus, during the 2015–2019 period, under the presidency of Mauricio Macri, a reorientation of social policies was promoted based on a logic centered on fiscal efficiency, conditionality in accessing benefits, individual responsibility and the figure of the entrepreneurial and self-sufficient subject was reinforced. This orientation evidenced a strong reconfiguration of social protection towards an assistance-based, individualistic, and conditional model, articulated with the discourse of entrepreneurship as a response to the problem of unemployment (Feldfeber and Gluz, 2019).

In the case of family allowances and the AUH, although coverage of the social protection system expanded between 2015 and 2019, this extension process developed heterogeneously. Regulatory updates in the value of benefits proved insufficient to sustain the purchasing power of real income (Beccaria *et al.*, 2020). During this period, the contributory component corresponding to family allowances for formal workers was reduced by eleven percent

² The AUH is a non-contributory social protection benefit, created in 2009 and aimed at children and adolescents from families in situations of unemployment or labor informality, from the first month of life up to eighteen years of age.

³ Following the Kirchnerist administrations, the electoral victory of the “Cambiamos” alliance occurred in 2015. The national “Cambiamos” government, presided over by Mauricio Macri, took place between 2015 and 2019, and in the same period, María Eugenia Vidal (belonging to this political force) became governor of the Province of Buenos Aires.

(11%), while the non-contributory component of the AUH increased by three percent (3%) (Beccaria *et al.*, 2020). Furthermore, through Decree No. 593/16, the coverage of family allowances was extended to the families of “monotributistas” – simplified tax regime for self-employed workers –, incorporating around 400,000 new beneficiaries. Nevertheless, despite the nominal increase in benefits, a loss of seventeen percent (17%) of their real value was verified (Idem, 2020).

Following the assumption of the “Frente de Todos”⁴ in the national State in December 2019, a series of reorientations in state interventions in the field of social protection became evident, aiming to rebuild social ties, reduce inequities, and improve the living conditions of broad sectors of the population affected by the neoliberal policies implemented by the previous administration. Two characteristic interventions stand out: on the one hand, the creation of the Food Card – within the framework of the National Plan “Argentina Against Hunger” (2020) –, under the Ministry of Social Development and in articulation with ANSES, with the objective of generating an integral food supplement, through the delivery of a card that allowed the purchase of basic basket foods, to beneficiaries of the AUH and the Pregnancy Allowance. Secondly, the creation of the National Program for Socio-Productive Inclusion and Local Development “Potenciar Trabajo”, stands out, which gathered the beneficiaries of social programs in vulnerable socioeconomic situations, with the aim of promoting social inclusion by improving employment and creating productive and educational proposals.

During this cycle, and following the decree of the Mandatory Social, Preventive, and Obligatory Isolation (ASPO) due to the health emergency caused by COVID-19, strict measures to restrict population circulation were promoted – with the exception of those performing “essential” labor tasks – with the objective of reducing the infection rate. This measure made visible, and in some cases deepened, the structural deficiencies and persistent inequalities of broad sectors of the population, especially those in situations of marginality, labor precariousness, and/or housing deficits. In this context, the Emergency Family Income (IFE) was created by means of the DNU No. 310/2020, which aimed to provide an exceptional non-contributory economic benefit to compensate for the loss or reduction of income for vulnerable sectors.

⁴ The “Frente de Todos” (Front for All) national government began in 2019, a Peronist-Kirchnerist political front led by former president Alberto Fernández and former vice-president of the nation Cristina Fernández de Kirchner. In the sphere of the Province of Buenos Aires, Axel Kicillof was elected as governor, also under the political alliance “Frente de Todos” between 2019–2023. Kicillof was re-elected governor of the Province of Buenos Aires for the 2023–2027 term.

With the arrival of “La Libertad Avanza”⁵ to the national government after the 2023 elections, a significant shift in the orientation of assistance policy can be observed, accompanied by a management project that promotes a radical reconfiguration of the State and society (Grassi, 2025). This change is expressed, for example, in the reorientation of the state role in the field of welfare, under the argument that these interventions are “costly and unnecessary” (Soldano, 2024). Along this line, the implemented macroeconomic policies – along with the reduction of monetary transfers, with the exception of the AUH which increased by 457% during the libertarian administration – resulted in an increase in labor informality and a loss of purchasing power for broad sectors, deepening the inequalities that mainly affect the most vulnerable (Vera *et al.*, 2025).

Thus, while public spending is being adjusted – through ministerial restructurings, the dismissal of state workers, the suspension of public works and subsidies, and budget freezes – the government announced the increase in the transferred amounts of two key social protection policies: fifty percent for the Food Card and one hundred percent for the AUH. Some authors refer to this state logic as “assistance-based approach to uncertainty” – *asistencialización de la incertidumbre* – (Zuccaro, 2024), insofar as state assistance proposes to intervene with those individuals who have been expelled from the supports of social integration, while uncertainty upholds the market as the regulating entity of life in society. In this scenario, youth and retirees emerge as two of the most affected groups, having suffered significant cuts in the specific programs and policies that historically defined them as “privileged” recipients (Leiva, 2025).

3. State interventions towards youth in recent Argentina: the case of Progresar and the Envión Program

Over the last two decades, social policies aimed at youth from popular sectors in Argentina have been configured at the intersection of the transformations of the welfare regime, disputes over the State’s role, and the reconfigurations of the «youth issue» as an object of state intervention. Within this

⁵ In November 2023, the electoral victory of the libertarian economist Javier Milei, of the “La Libertad Avanza” party, took place. In December of that same year, he took office as president of the nation for the period comprising 2023–2027. Despite the change in political alignment in the national government, at the provincial level, the re-election of Axel Kicillof (of Peronist political alignment) as governor occurred. This marked a change compared to past elections, in which the national and provincial governments shared the same political alignment.

framework, *Progresar* and *Envi3n* constitute two paradigmatic modalities of intervention: the former, originally linked to the logic of social security and social rights and with a national scope; the latter, with a territorial base and a community-based and decentralized focus throughout the Province of Buenos Aires (Ayos and Jack, 2020).

The Program of Support for Argentine Students, “*Progresar*”, created in 2014 during the government of Cristina Fern3ndez de Kirchner, was originally conceived as a monetary transfer policy destined for youth between eighteen and twenty-four years old who were unemployed or employed with incomes below three minimum wages, and who certified enrollment in recognized educational institutions, fundamentally in higher education (Dec. 84/2014). The amount of this economic benefit was, at its inception, \$600 (approx. US\$75), close to the value of the AUH, which in the same year was \$644 (approx. US\$80); and its implementation was the responsibility of the National Social Security Administration (ANSES), which gave it a unique character: it was included in the sector of social policies linked to social rights like the AUH, although it was not a component of social security, recognizing youth as subjects of rights. In this way, it represented a significant displacement from classic workfare-type assistance policies, which subordinated the economic benefit to a labor or training requirement (Ayos, 2013).

Likewise, in previous works (Ayos and Jack, 2020), it has been observed that *Progresar* distanced itself from traditional assistance programs because it dismantled the local-territorial dimension that these interventions proposed, as well as the issue of proximity and “monitoring” that also characterized and characterize this type of program. That is to say, its intervention logic was linked to social security, as a non-contributory component, which blurred the programmatic aspect of a territorialization characterized by proximity. This modality was not constrained by the subjective capacities of youth but rather escaped the tendency toward the individualization of social problems, focusing attention on the structural variables that would enable the exercise of the right to education (Idem, 2020).

In that context, the scope of *Progresar* was massive: by 2015, one year after its launch, it registered around 870 thousand beneficiaries (ANSES, 2015). According to the Survey of Young PROG.R.ES.AR Beneficiaries (Ministerio de Econom3a y Finanzas P3blicas de la Naci3n, 2014), 77.4% of beneficiaries belonged to the five deciles of households with the lowest incomes. Regarding the educational level, 34% were studying secondary education and 55% were pursuing higher education — tertiary or university. This latter percentage increased in subsequent years: by mid-2020, 88% of the scholarships assigned corresponded to higher education (SIEMPRO, 2020^b).

However, during the national government of the “*Cambiemos*” alliance,

a series of modifications were established that reoriented the logic of this program toward a meritocratic and individualistic focus. The Progresar *Program* was renamed Progresar *Scholarship* and was transferred to the Secretariat of University Policies of the National Ministry of Education as a new educational policy oriented toward promoting the completion of studies and educational results, under the assumption that its efficiency would be maximized through merit, the hardening of requirements, and demands for educational performance. From then on, beneficiaries had to pass at least fifty percent of the annual subjects stipulated in their *curriculum* to continue in the program: twenty percent of the monthly amount was withheld – until accreditation of this compliance – and those who did not reach that goal were dropped.

Concurrently, the amount of the benefit ceased to be fixed and standardized for all beneficiaries and a stratified scheme was implemented for the assigned amounts, which varied according to the scholarship line⁶, the year of study, and the type of career – especially if it was considered “strategic” for national development. Thus, the stipend ceased to be a uniform amount to be organized based on educational performance, with the explicit purpose of “rewarding the student who stands out” and prioritizing those pursuing careers considered priorities (Ayos, Jack and López, 2022). Regarding the amount of the economic benefit, after more than two years in which its value was not updated, in February 2018 the basic assigned amount was set at \$1250 (approx. US\$63) for the Progresar Scholarships for the Completion of Obligatory Education and the Promotion of Professional Training Courses, and then between \$1600 (approx. US\$80) and \$7442 (approx. US\$373) depending on the scholarship line, the year of study, and the career pursued.

In sum, in this socio-political cycle, Progresar was reoriented toward the promotion of “successful” trajectories, reinforcing an individualistic rationality that shifted the responsibility for permanence and educational progress onto the youth (Ayos and Jack, 2020; Ayos, Jack and López, 2022; López and Ibarra Ruoredda, 2025). From the perspective of the National Ministry of Education officials – members of former President Alberto Fernández’s government – interviewed, these modifications made during the “Cambie-mos” administration had an “exclusive regulatory logic” that limited the program’s coverage: while in 2015 there were 870 thousand beneficiaries, in 2019 only approximately 452 thousand beneficiaries were reached (Ayos, Jack and López, 2022).

Other changes became significant in the program’s history following the

⁶ In 2018, different Progresar educational scholarship lines were created, and the stipend amounts were stratified based on the type of scholarship and the year of study.

outbreak of the COVID-19 pandemic, which coincided with the first months of the “Frente de Todos” administration during 2020. In a context of deepening socioeconomic and educational inequalities – accentuated by technological and connectivity gaps (Kessler and Benza, 2020) – the transformations to Progresar sought, according to the interviewed state agents, to recover its “inclusive character” and expand its scope by reviewing academic requirements, updating amounts, and expanding the target population, incorporating groups in situations of multidimensional vulnerability⁷ (Res. 70/2020).

Within this framework, there was a proposal to “territorialize the program” through the implementation of a national, jurisdictional, and territorial tutoring system to accompany the educational trajectories of youth and dismantle the program’s “banking paradigm” (Ayos, Jack and López, 2022). This “banking logic” would consist, from the perspective of the interviewees, in transferring money or paying scholarships without organizing and managing the components that characterize programs oriented toward this population, such as accompaniment, periodic monitoring, and close contact between operators and young beneficiaries (Idem, 2022). Thus, between 2021 and 2023, progress was made in this territorialization of the program through the creation of “Progresar Points” and “Progresar Spaces”, conceived as spaces for advisory services and rights promotion (Res. 3421/2021; Res. 3047/2021).

Furthermore, with the purpose of expanding the program’s coverage and favoring the educational continuity of participating youth, modifications were introduced to its operational scheme. Thus, an annual call system was established, with an extended enrollment period – from March to May – the number of installments was increased from ten to twelve monthly payments, and in 2020 the scholarship amounts were updated, oscillating between \$2250 and \$6900 (approx. US\$34 to US\$105), depending on the corresponding scholarship line (Resol. 70/2020). However, although the nominal values of the scholarships increased (from \$1600 to \$6000 in 2019 and from \$3600 to \$9000 in 2021 and to \$20000 in 2023, comparable to the AUH of \$20661

⁷ According to the Progresar regulation, updated under Resolution No. 70/2020, “groups in conditions of multidimensional vulnerability” are understood as those sectors that have historically suffered multiple exclusions and/or symbolic, material, socioeconomic, or any other type of violence. For the purposes of this program, these groups are understood to be comprised of: individuals in charge of a single-parent household — that is, households economically supported by a single parent without contributions from the other progenitor — with children under eighteen years of age; individuals who are members of Indigenous communities and/or belong to native peoples; transgender individuals; people with disabilities; refugees; and people of African descent and/or Afro-Argentiniens.

in December of the same year), a significant loss of real purchasing power was recorded: according to SIEMPRO (2021^b), the amounts had a reduction of 50.3% in the first quarter of 2021 compared to the fourth quarter of 2020.

Regarding horizontal coverage, toward the end of the “Frente de Todos” administration in 2023, the program reached 1.8 million beneficiaries (ANSES, 2023). In this context, in October of the same year, Law No. 27,726 institutionalized Progresar as a right for youth between sixteen and thirty years old, stipulating its financing through the Progresar Fiduciary Fund (DNU 57/2022), in an attempt to consolidate this policy against the instability of governmental cycles.

Starting in December 2023, with the victory of “La Libertad Avanza”, Progresar again experienced a significant change in its orientation. Under the new Ministry of Human Capital, this policy began to be administered by the Secretariat of Education, with the objective of “favoring the completion of compulsory studies and insertion into higher education” (Res. 146/2024). Within this framework, an openly meritocratic logic was reinstalled, expressed in the hardening of access and permanence criteria: distinctions were established between those who had already been beneficiaries and those who were enrolling for the first time; strict caps were set on the duration of careers; and, the stipend amount remained frozen from July 2023 (Res. 1673/2023) until September 2024 (Resol. 888/2024), in a context of cumulative inflation exceeding one hundred and forty percent (140%).

The new libertarian administration also incorporated an additional requirement: the obligatory completion of a “Vocational and Labor Guidance Course”, which is virtual and self-paced, as a condition for accessing the scholarship payment. Thus, this combination of greater demands and loss of purchasing power strains the very purpose of the program, limiting its real capacity to guarantee the continuity of youth educational trajectories (López and Ibarra Ruoredda, 2025).

Although Progresar formally remains active, the amounts of the economic benefits remain significantly lagged. In 2025, the value of the scholarship – which has remained unaltered since September 2024 – is \$35,000 (approx. US\$24), and practically the same amount is granted for the different scholarship lines, which implies a year-on-year drop in the scholarship’s purchasing power of nearly thirty percent. This data is highly significant when compared to the evolution of the AUH value for the same period: the AUH saw increases of 100% in January 2024 and with successive updates in the recent period – linked to the Social Security Mobility Law – reaching a net value of \$93,800.77 (approx. US\$64) in October 2025, which shows a process of nominal recomposition that, however, does not necessarily translate into a real improvement in purchasing power.

Likewise, horizontal coverage was reduced from nearly 1.8 million beneficiaries in 2023 to just over 1 million in the first half of 2024 (IPyPP, 2024). This setback reflects a new regressive turn in terms of social rights, in which the appeal to merit is combined with a material emptying of the policy. Beyond the changes in focus or management, the gap between the declared objectives and the real living conditions of its beneficiaries widens, configuring a scenario where access to and the exercise of rights becomes increasingly uncertain (Ambort, 2025).

For its part, the Shared Social Responsibility Program “Envi3n”, of the Ministry of Community Development, is an assistance policy of the provincial administration implemented in co-responsibility with municipalities and with social-community and non-governmental organizations. The program was created in 2009, with the objective of «promoting the social inclusion of youth between twelve and twenty-one years old in situations of social vulnerability», through the design and implementation of strategies that «strengthen their links with education, health, and the world of work, and generating mechanisms that allow them to develop new modalities of relationship with the social environment» (MDS PBA, 2010). Currently, Envi3n operates in one hundred and thirty-five districts of the Province of Buenos Aires, in various neighborhood headquarters and organizations. Its main proposal is for youth to participate in workshops and activities designed by the technical teams of each Envi3n headquarters; this instance operates as the required activities for accessing the scholarship payment.

Along this line, in previous works, the program has been conceptualized as a “proximity” intervention modality (Ayo and Jack, 2020) regarding the link between youth groups and technical teams. Through an intensive mode of territorialization in relation to its scale, with a presence in each of the municipalities and neighborhoods of Buenos Aires, the technical teams try to generate direct and daily contact with the youth groups. The construction of proximity ties with young people is the form of intervention that characterizes this policy (Idem, 2020).

However, Envi3n is an assistance policy that has historically been characterized by the marginal and depreciated nature of the scholarships and the precarious labor conditions of the workers on the technical teams. During the provincial government of “Cambiamos,” with Mar3a Eugenia Vidal as governor, the budget deficit for its implementation deepened, particularly in the municipalities managed by the same political alliance (Jack, 2020, 2021). In this sense, in those districts governed by Peronist-Kirchnerist political fronts, Envi3n was “rearmed,” with the support of the municipal administrations, to try to sustain the continuity of the program and cover food assistance for the participating youth; while in the districts managed by the “Cambiamos”

alliance, labor precariousness, the dismantling of work teams, and the lack of resources for the program's operation intensified, blurring the institutional nature of this assistance policy. Based on interviews conducted with the agents involved in its implementation, it was found that in those municipalities, the continuity of *Envi3n* was decided between the self-management, the – political-militant – commitment, and the – professional – “vocation” of the local technical teams to sustain the program spaces (Jack, 2021), in a scenario of extreme precariousness and institutional weakness.

In relation to the value of the scholarships, during this socio-political cycle, the economic benefit was practically frozen. In 2010, one year after its implementation, its value was \$350 (approx. US\$87) and this amount remained unaltered until mid-2020 when it reached a value of \$800 or \$400 (between US\$12 and US\$6 respectively) if the AUH was also received.

Furthermore, in the context of the health emergency caused by COVID-19 and the Mandatory Social, Preventive, and Obligatory Isolation established by the national and provincial government, a set of significant transformations were implemented in the management strategies of this intervention modality to address the situation of youth and their families. The intervention modalities were restructured, new proposals and activities were created, to “sustain the bond” and continue – virtually – with the accompaniment, as well as to protect youth from COVID-19 infection (Ayo, Jack and L3pez, 2022). In this sense, in the case of the *Envi3n* Program, attempts to reinforce “proximity” strategies were observed, even in the context of the pandemic, based on a process of innovation in the repertoire of actions deployed by the program. This occurred within the framework of a deepening trend toward the devaluation of monetary transfers, both for beneficiaries and for technical teams and tutors (Idem, 2022).

In relation to this, if we observe the evolution of the scholarship value, in September 2020 the amount of the *Envi3n* scholarship was updated to \$1800 (approx. US\$24) and the program's incompatibility with the AUH was eliminated, so all scholars began to receive the same value. In the same period, both the AUH and *Progresar* had amounts higher than the *Envi3n* scholarship: the AUH was \$3540 (approx. US\$48) (SIEMPRO, 2020^a) and the *Progresar* scholarship amounts during 2020 ranged between \$2250 (approx. US\$30) and \$6900 (approx. US\$93) depending on the scholarship line. In April 2021, the value of the *Envi3n* scholarship was raised to \$3000 (approx. US\$32), while the *Progresar* amounts oscillated between \$3600 (US\$39) and \$9000 (US\$97) (SIEMPRO, 2021^b). However, that year the entry into the *Envi3n* scholarship system was closed, only enabling “highs for lows” of beneficiaries, which resulted in a significant increase in the “waiting list” for new registrations. By December 2023, the value of the *Envi3n* scholarship

amounted to \$12000 (approx. US\$15), while the AUH reached \$20661 (approx. US\$26) and the Progresar scholarship reached \$20000 (approx. US\$25). These data show that during the period, the value of the Envión scholarship remained below the amounts assigned by other social policies such as the AUH and Progresar.

In terms of horizontal coverage, Envión recorded an approximate total of twenty thousand participants in 2010 (MDS de la Provincia de Buenos Aires, 2010), a figure that increased to 35,530 young participants in 2020 (SIEMPRO, 2021^b). By 2023, an approximate coverage of 75,000 participants was reached, and in 2024, it reached almost 80000 participants. Nevertheless, this number remains significantly lower than the number of beneficiaries that Progresar reached in the Province of Buenos Aires alone during the same period: in the last quarter of 2020, the program reached a coverage of 182,432 youth, equivalent to 34% of the total number of beneficiaries nationwide (SIEMPRO, 2020^a). Likewise, when compared with the data provided by SIEMPRO for 2022, it is possible to note that this gap widened, as Progresar registered 590,715 beneficiaries in the Province of Buenos Aires (SIEMPRO, 2022).

Now, currently, in the context of the “La Libertad Avanza” government at the national level and Axel Kicillof (Peronist-Kirchnerist alliance) at the provincial level, significant variations in the values of economic benefits are observed. The value of the Envión scholarship is \$31,360 (approx. US\$21) (Resol. 780/25), while the Progresar scholarship remains practically frozen at \$35,000 (approx. US\$24), and the AUH reached, as mentioned, a value of \$93,800.77 (approx. US\$64).

In summary, in the case of the Envión Program, it is observed that in recent years a process of reinforcement of income transfer has opened, repositioning the place of the economic dimension in this state intervention. This contrasts with the historical decentering and marginal nature that the economic component has had within the “proximity” and closeness strategy between technical teams and youth that characterizes the program. At the same time, this attempt at recomposition of the Envión scholarship value occurs within the framework of a process of devaluation of the economic benefit granted by Progresar, a policy in which the core of its intervention strategy historically focused on income transfer to promote the exercise of the right to education — and which until 2023 saw increases close to the AUH — but in contrast to the AUH, which recorded significant increases in the 2024–2025 period thanks to the Social Security Mobility Law.

In this paper, we have analyzed the recent transformations of Argentine social policy based on the analysis of two emblematic programs directed at youth: the Program of Support for Argentine Students “Progresar” and the

Shared Social Responsibility Program “Envi3n”. In this manner, we addressed the ways in which the «youth question», labor, and social inequality are problematized within a context marked by a transformation process of social protection in Argentina, characterized by the coexistence of advances, setbacks, and persistent tensions. These shifts cannot be understood solely as a result of the changes in orientation of national governmental administrations, but as an expression of a more complex framework of structural reconfigurations, dynamics specific to subnational levels, and political-cultural disputes with diverse temporalities.

Regarding Progresar, starting from the process that began in 2015, a process of weakening its link with the field of social security and, in particular, with the innovative AUH, concerning the non-contributory approach, can be observed. In this sense, its drift toward being framed as an educational scholarship and the incorporation of meritocratic criteria, revisited in the 2019–2023 period, are deepened by the libertarian administration, showing a shift toward institutional and political logics oriented by the paradigm of “human capital” and “individual autonomy”, which tend to reduce the State’s role in guaranteeing rights and subordinate assistance to employability or educational performance objectives.

This reorientation poses central tensions for the field of youth policies, as the axes of educational accompaniment and rights promotion are displaced by approaches of disciplining, efficiency, and merit (L3pez and Ibarra Ruoredda, 2025). Considering the centrality that income transfer had in the original formulation of Progresar in its deterritorialized intervention logic, the marked decline of this transfer in the last cycle is highly significant, reconfiguring its place in the scope of youth policies. Furthermore, the distance observed in the same period between the value of this transfer and that granted by the AUH is also significant: it shows that it is not possible to understand this as part of a general national government orientation – the global reduction of social benefits – but as a specific decision in the field of youth; that is, it is necessary to observe this to understand the reconfigurations of its link with labor and the educational field, among others.

Looking at Envi3n, on the other hand, it is possible to visualize a trajectory that is, at some point, the inverse: an intervention that, from its “proximity” dynamic, decentered the income transfer component, now shows a process of recomposition of that transfer. And this occurs within the framework of an attempt to reverse its historical institutional and funding weakness across its different dimensions, such as the increase in the wages of workers and the scholarships of the tutors, although in a context of great difficulty for the provincial government. This process highlights the importance of the subnational level for understanding the transformations in interventions toward youth and

the complexities that mark the dynamics of social protection in the period under study. These are the coordinates estimated to be significant for understanding the current reconfigurations of social protection in the field of youth and the processes of inequality construction in which they participate.

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18. Sugar-sweetened beverage consumption in urban areas of Argentina: a public health problem and an intermediary determinant of health inequalities

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1. Introduction¹

We draw on a perspective on social inequalities in health within the capitalist system that has both conceptual and ethical dimensions. Following the Latin American collective health and critical social epidemiology, inequalities stem from the structure of social classes and its intersections with gender and ethnic-racial relations that constitute collective ways of life for different social groups (Ortiz-Hernández, 2007; López Arellano, Escudero and Moreno, 2008). From an ethical standpoint, inequalities are unjust and morally objectionable when they limit the full enjoyment of human rights related to health and access to quality food for some social groups. As Breilh (2010, p. 88) points out, «health develops as a concatenated process among the spatial dimensions of the general, the particular, and the singular (microsocial); one cannot understand, for example, the logic of the implantation of facilities, the segregation of urban space, the distribution of qualities of life among its neighborhoods or areas, the rhythms and flows of living, working, and commuting, without understanding the forces and economic relations of the global accumulation system». At the microsocial level, “lifestyles” are formed based on family and personal consumption patterns that include food, which can be protective or harmful to health. In this sense, food consumption constitutes an intermediate determinant of health (WHO, 2010).

¹ The research project was supported by the CONICET (PIP 11220220100111) and the University of Buenos Aires (UBACyT 20020220100032). This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union’s Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

Social studies on food highlight that eating practices constitute habits endowed with social meanings and cultural conventions, and that are shaped by material, spatial, and temporal resources, as well as skills, abilities, and personal tastes (Delormier, Frohlich and Potvin, 2009; Maller, 2015; Halkier and Holm, 2021). Eating practices are a powerful creator of gender and class or social position differentiation (Bourdieu, 1988). Economic resources and cultural capital shape eating practices and representations of the body; in turn, food preferences and routines reinforce them symbolically. Following Cockerham (2000; 2018), food consumption is an important part of lifestyles linked to health, involving practices that have a certain unity over time and cultural rationality, as they are not solely oriented to satisfy utilitarian needs but also identity needs, and they vary throughout the life course.

Regarding age and the stage of life, young people tend to postpone preventive health care, which includes the consumption of foods and drinks recommended as healthy; although attention to health also varies according to social class and biographical experiences with illness (Lawton, 2002; Cockerham, 2005). Older people, due to the health conditions that accompany the aging process, tend to have a healthier diet (Sydner *et al.*, 2007). Likewise, life events, such as motherhood and fatherhood, mark turning points in dietary practices related to health (Craig and Stewart-Trunswell, 1994). Nonetheless, research conducted with mothers of children and adolescents shows that they negotiate consumption decisions with them largely due to the growth of the market of ultra-processed food (UPF), including sodas and other sugary drinks with low nutritional content, targeted to children (Castro-nuevo *et al.*, 2016; Freidin, 2016; Freidin and Bonetto, 2017).

The socio-ecological perspective on food consumption analyzes the interface between the food environment and everyday practices. The food environment mediates the acquisition and consumption within the broader food system that structures it: it encompasses availability, prices, the characteristics of stores, products and promotional information, as well as personal dimensions related to accessibility, purchasing power, time availability, convenience, and desirability of offerings and products (Turner *et al.*, 2018; Fanzo and Davies, 2021). With the advancement of the globalization of the dominant food production system, since the 1950s in high-income countries and since the 1970s in middle-and low-income countries, there has been an increase in the availability and consumption of ultraprocessed food (UPF), including artificially sweetened non-alcoholic beverages. The increase in the sale of UPF has been registered in several Latin American countries, including Argentina (OPS, 2019; Zapata *et al.*, 2023). They are industrially manufactured products with substances derived from other foods or synthesized from other organic sources, have very low nutritional value, and are poten-

tially addictive. UPF are associated with nutritionally unbalanced diets, overweight and obesity, and other risk factors and non-communicable chronic diseases, as well as dental decay (Popkin, 2012; OPS, 2019; Lara Castor *et al.*, 2025).

The sales of UPF have grown globally alongside urbanization processes and market deregulation (Adams *et al.*, 2020), showing a convergence toward diets with higher levels of processing, but also regional and national divergences in sales volumes and types of products (Hawkes, 2007; Baker *et al.*, 2020). The transnational expansion of large food and beverage corporations, with their marketing strategies and political influence mechanisms, are key actors in the increase of ultra-processed food consumption (Hawkes, 2007; Baker *et al.*, 2020). In particular, the consumption of sugar-sweetened non-alcoholic beverages (SSBs), which include sodas, powdered or concentrated juices, flavored waters, energy drinks, and sports drinks) increased in high-income countries until the mid-2000s, when the market diversified with the production of artificially sweetened beverages with lower sugar content and non-caloric artificial sweeteners. However, this trend was not observed in low- and middle-income countries, where an increase in SSBs consumption was observed until recent years (Popkin, 2012; WHO, 2023).

In Argentina, the consumption of soft drinks, which began to expand in the 1960s, is among the highest in the world (Baritoli, Elorza and Geri 2020; Alcaraz *et al.*, 2020). In 2013, Coca-Cola Company and PepsiCo accounted for 82.1% of the soft drink market (Finzi, Gualdoni and Cabrera, 2018). According to the Euromonitor data for the period 2005-2015, soft drinks predominated in the local market of non-alcoholic beverages (59%), while flavored waters represented 11%, with a recent growth in beverages with lower sugar content and fewer calories (Maceira and Espinola, 2018, p. 17-18).

Studies on consumption patterns of added sugar beverages conducted in high-income countries show a decrease in the consumption of sodas and juices, but an increase in others, such as energy and sports drinks; as well as social disparities according to income and educational levels, indicating and association of lower consumption with higher social resources, and differences according to gender and age (see, among others, Piernas, Ng and Popkin 2013; Warren *et al.*, 2022). In the Latin American context, Fontes *et al.* (2020) analyze demographic, socioeconomic, and lifestyle factors that influence consumption of these beverages among the urban population of São Paulo. The survey, based on a random sample conducted in 2008, indicates that adolescents almost double the consumption compared to older adults, mainly through sodas; consumption is lower among women, physically active adults, and households with higher incomes. Among older adults with lower incomes, lower consumption was observed and particularly fruit jui-

ces, while adolescents with higher household incomes showed an opposite pattern. In Mexico, López-Olmedo, Popkin, and Taillie (2018) show different results depending on the information source used: a panel-type survey based on household purchases during 2012–2014 and the 2012 National Health and Nutrition Survey. While the first data source records an inverse relationship between household socioeconomic level and consumption of less healthy beverages, this pattern is not observed in the intake survey based on individual consumption. The differences are interpreted as being due to variations in measurements and the consumption items included. The study by Baritoli, Elorza, And Geri (2020) conducted in Argentina based on the National Household Expenditure Survey (ENGHO, in Spanish) from 1996/1997, 2004/2005, and 2012/2013, shows that soda consumption based on purchases is higher at higher income levels, although it does not distinguish between sugar-sweetened and artificially sweetened beverages. The work of Kovalskys *et al.* (2020), using data from the Latin American Study of Nutrition and Health from 2014 and 2015 for the population aged 15 to 65 years, based on 24-hour recall methodology, finds that the consumption of sugar-sweetened beverages in Argentina is higher in lower socioeconomic groups.

In this chapter, we examine the influences of sociodemographic variables in the frequency of consumption of sugar-sweetened beverages (SSBs) in the adult population of urban areas in Argentina. The purpose is to provide evidence from the perspective of the social sciences on social inequalities in health and food practices based on the most recent national-level survey.

2. Methodology

A cross-sectional quantitative study was conducted using secondary statistical data, with the source of information being the Second National Nutrition and Health Survey (ENNyS) carried out during 2018 and 2019 by the Ministry of Health and Social Development. The ENNyS is based on a probabilistic sample, which allows for estimates for the population residing in private households in urban areas of Argentina with 5,000 inhabitants or more. The ENNyS addresses various topics related to food consumption, including questions about the frequency of consumption of certain foods and beverages over the past three months. The present chapter focuses on the frequency of SSBs consumption among the population aged 18 years and older. To facilitate a bivariate analysis, responses were grouped into once or more per day consumption, between one and six times per week, and less than once per week. A multivariate analysis was also done using binary

logistic regressions, and the variable was dichotomized between those who consume at least once per week (contrast category) and those who consume less than once per week (reference category). Therefore, the models show the odds ratio of consuming at least once per week. Independent variables were incorporated stepwise. Additionally, interactions between sex and age group (Model 5) were analyzed, as well as between sex and the regionalized household income quintile per consumption unit, and sex with educational level to examine intersectionalities in differences in the frequency of SSBs consumption.

3. Analysis

Tab. 1 shows that approximately one-third of people consume SSBs daily (32.9%), another third consumes it one to six times per week (32.5%), and the remaining third less than once per week (34.5%). It is also evident that the frequency of its consumption varies according to the characteristics of individuals and households. It decreases as age increases and among women, while it is higher among people with lower educational level and household income, who live in homes without piped water inside the house, and who belong to households with children. Conversely, it is lower among those with diabetes and/or dyslipidemia, high cholesterol or triglycerides (health conditions that require a carbohydrate-restricted diet). In addition, there are differences between regions, with higher consumption observed in the Northwest. Finally, consumption is higher among those who also weekly consume other products not recommended by the Argentine Dietary Guidelines (GAPA) (snacks, sweets, and pastries) and lower among those who consume daily products recommended by the GAPA (although the relationship is stronger with fruits than with vegetables).

Tab. 1 - Frequency of consumption of sugar-sweetened beverages (SSBs) according to selected socio-demographic variables. Population aged 18 and over residing in urban areas of Argentina, 2018-2019. Data in %

		Frequency of consumption of SSBs		
		Daily	1 to 6 times per week	Less than once per week
Education level	Incomplete primary	35.1	32.5	32.4
	Complete primary - incomplete secondary	40.3	32.8	26.9
	Complete secondary - incomplete higher	30.7	33.5	35.7
	Complete higher	16.5	29.9	53.7

Household income quintiles of the consumer unit	1	42.5	35.5	22.0
	2	41.9	37.2	20.9
	3	36.4	32.4	31.2
	4	29.4	27.6	43.1
	5	19.0	31.6	49.4
Water supply inside the house	Yes	31.3	33	35.7
	No	45.7	29.0	25.3
Gender	Male	36.8	34.3	28.9
	Female	29.7	31.1	39.2
Age group	18 a 24	40.2	37.2	22.6
	25 a 34	37.0	38.9	24.1
	35 a 49	32.6	34.6	32.8
	50 a 64	28.0	27.9	44.1
	65 and over	25.8	20.3	53.9
Region	Greater Buenos Aires	35.2	26.6	38.1
	Northwest	36.4	41.8	21.7
	Northeast	28.4	45.1	26.5
	Cuyo	30.9	42.8	26.2
	Center	31.4	30.5	38.2
	Patagonia	30.1	32.4	37.6
Presence of children in the household	With children	38.6	35.8	25.6
	Without children	26.5	28.9	44.5
Health condition	Diabetes, dyslipidemia, high cholesterol or triglycerides	23.3	24.5	52.2
	Without diabetes, dyslipidemia, high cholesterol or triglycerides	35.5	34.7	29.8
Fruit consumption	Daily	25.1	25.1	49.8
	Less than daily	36.7	36.2	27.0
Vegetable consumption	Daily	30.8	28.4	40.8
	Less than daily	34.3	35.4	30.2
Snacks consumption	Weekly	47.9	34.6	17.5
	Less than weekly	31.2	32.3	36.5
Sweets consumption	Weekly	37.8	31.1	31.1
	Less than weekly	31.1	33.1	35.8
Pastry consumption	Weekly	38.0	35.0	27.0
	Less than weekly	29.0	30.7	40.3
Total		32.9	32.5	34.5
		(2,424)	(2,398)	(2,544)

Source: Own elaboration based on ENNyS 2018-2019.

Tab. 2 presents the results of the binary logistic regressions. Regarding the educational level, it is observed in all models that people of all other educational levels are more likely to consume SSBs at least once a week than those with a complete higher education level (reference category). In Model 2, the effect of this variable slightly increases, mainly for those with incomplete primary education. This is due to the fact that among those with lower educational levels, the older adult population has significant weight, who in turn have a low frequency of SSBs consumption. Concerning income, across the different models, when taking the 5th quintile as a reference, those in the

remaining quintiles (except the 4th) are more likely to consume SSBs at least once a week. In contrast to what happens with the educational level, once demographic variables are controlled for (Models 2, 3, 4, and 5), the differences decrease. This is because the younger population (with higher consumption frequency) has less weight in the 5th quintile than in the remaining age groups. Regarding water supply, in all models those without piped water inside the house are more likely to consume BAA at least once a week. Similar to income, the effect of this variable decreases once socio-demographic variables are controlled for (Models 2, 3, 4, and 5).

Tab. 2 - Logistic regression of weekly SSBs consumption frequency (1) according to selected variables. Population aged 18 years and older residing in urban areas of Argentina, 2018-2019

	M1	M2	M3	M4	M5
Education level (Ref: Complete higher)	-	-	-	-	-
Incomplete primary	1.33**	2.00**	2.07**	2.07**	2.03**
Complete primary - incomplete secondary	1.96**	2.01**	2.05**	2.01**	1.99**
Complete secondary - incomplete higher	1.64**	1.37**	1.37**	1.37**	1.34**
Household income quintiles of the consumer unit (Ref: 5)	-	-	-	-	-
1	2.50**	1.95**	1.92**	1.71**	1.75**
2	2.80**	2.20**	2.17**	2.03**	2.07**
3	1.72**	1.57**	1.55**	1.48**	1.50**
4	1.12+	1.08+	1.07+	1.02+	1.04+
Water supply inside the house (Ref: Yes)	2.25**	1.89**	1.87**	1.82**	1.84**
Gender (Ref: Female)		1.66**	1.64**	1.58**	0.94+
Age group (Ref: 65 and over)	N/C	-	-	-	-
18 a 24	N/C	3.28**	2.66**	1.96**	1.68**
25 a 34	N/C	3.21**	2.68**	2.08**	1.50**
35 a 49	N/C	2.19**	1.93**	1.64**	1.18+
50 a 64	N/C	1.47**	1.44**	1.33**	1.04+
Presence of children in the household (Ref: without)	N/C	1.41**	1.38**	1.38**	1.38+
Region (Ref: Greater Buenos Aires)	-	-	-	-	-
Northwest	N/C	2.23**	2.26**	2.29**	2.29**
Northest	N/C	1.58**	1.54**	1.57**	1.56**
Cuyo	N/C	1.83**	1.84**	1.66**	1.66**
Center	N/C	1.06+	1.04+	1.02+	1.03+
Patagonia	N/C	1.00+	0.98+	1.06+	1.07+
Health condition (Ref: with diabetes and/or dyslipidemia, high cholesterol or triglycerides)	N/C	N/C	1.90**	1.86**	1.88**
Fruit consumption (Ref: daily)	N/C	N/C	N/C	1.76**	1.76**
Vegetable consumption (Ref: daily)	N/C	N/C	N/C	1.03+	1.03+

Snacks consumption (Ref: weekly)	N/C	N/C	N/C	0.54**	0.54**
Sweets consumption (Ref: weekly)	N/C	N/C	N/C	0.87*	0.87*
Pastry consumption (Ref: weekly)	N/C	N/C	N/C	0.63**	0.63**
65 years and more and women (ref.)	N/C	N/C	N/C	N/C	-
18 to 24 years-old and men	N/C	N/C	N/C	N/C	1.41+
25 to 34 years-old and men	N/C	N/C	N/C	N/C	2.07**
35 to 49 years-old and men	N/C	N/C	N/C	N/C	2.12**
50 to 64 years-old and men	N/C	N/C	N/C	N/C	1.77**
Constant	0.74**	0.23**	0.16**	0.11**	0.46**
Nalgerkerke R squared	0.10	0.19	0.20	0.24	0.25

Notes: (1) Consumes less than once a week = 0, Consumes once a week or more = 1 N/C not considered

** $p < 0.01$, * $p < 0.05$, + $p > 0.05$

Source: own elaboration based on ENNyS 2018-19.

Regarding sex, age group, presence of children under 14 years-old in the household, and region, in Models 2, 3, and 4 it can be seen that, as in the bivariate tables, men are more likely to consume SSBs at least once a week than women (1.66 times higher odds in Model 2), and all age groups have higher odds than the older adult population, as well as that those living in households with children have higher odds than those without (1.41 times in Model 2). It is worth noting that in Model 3 (with the inclusion of health conditions) and in Model 4 (with the introduction of other food consumption), the effect of age group decreases, although the differences remain statistically significant. Finally, those residing in the Northeast, Northwest, and Cuyo regions are more likely to consume SSBs at least once a week than those residing in Greater Buenos Aires (while there are no significant differences with those residing in the Central region and Patagonia). Concerning health status, included in Model 3, as in the bivariate relationship, individuals without a diagnosis of diabetes and/or dyslipidemia, high cholesterol, or triglycerides have higher odds of consuming SSBs at least once a week. Meanwhile, in Model 4, other food consumption frequency variables are included. It is observed that those who consume other products not recommended for health reasons (snacks, sweets, and pastries) at least once a week, and those who do not consume fruits daily, have a higher probability of consuming BAA weekly. On the other hand, there is no significant relationship with daily vegetable consumption.

Finally, Model 5 presents the result of the interaction between sex and age group. In this Model the sex variable shows only the effect in the elderly population and is not statistically significant. Also, the age group shows only the effect in women, and it is observed that the differences of the older

population with the younger groups (18 to 24 and 25 to 34) decrease sharply, and the differences with the groups aged 35 to 49 and 50 to 64 are no longer significant. In other words, the effect of the age group is smaller among women than in the general adult population. Lastly, the interaction terms between sex and each age group show that, with the exception of the youngest age group, gender differences are greater in all groups than in the population aged 65 and older. We analyzed the interaction between sex and income quintile, and between sex and educational level (the results are not presented here). In both models, the interaction terms are not significant.

4. Conclusions and recommendations

The ENNyS 2018-19 shows that the levels of consumption of SSBs among adult population Argentina are very high, making it a public health concern. The patterns found are consistent with previous international research (Piernas *et al.*, 2013; Kumar *et al.*, 2014; Miqueleiz *et al.*, 2014; Fontes *et al.*, 2020; Robelto *et al.*, 2022; Warren *et al.*, 2022), and national evidence based on 24-hour recalls (Kovalskys *et al.*, 2020) that shows that people with lower educational levels and income are the ones who consume SSBs more frequently. Consumption was also higher among people living in houses without piped water, which is considered a barrier to water consumption that could promote the intake of artificial beverages. The population without piped water in their homes is among the lowest-income groups; however, in the multivariate analysis, the association between this housing characteristic and the frequency of SSBs consumption persists. The present study provides further evidence on the importance of ensuring this basic habitat resource for the health of the population (IBU-PNUD, 2023).

In line with other studies (Kumar *et al.*, 2014; Drewnowski and Rehm, 2015; Robelto *et al.*, 2022), the results of the ENNyS show that the consumption of ultra-processed foods decreases among the older population. This may be due to the greater attention paid to health care because of risk factors and chronic non-communicable diseases that accompany aging and that require dietary restrictions (Sydner *et al.*, 2007; Ballesteros *et al.*, 2022). It is worth noting that the multivariate analysis allowed for a deeper understanding of the issue. Controlling for the effect of health status, age continues to have an effect, suggesting that it is not only health conditions that differentiate diet but also a greater neglect of health at younger ages. The effect of age also decreases once the relation with other eating habits is controlled, indicating that the lower presence of SSBs consumption in the older population is part of a healthier diet. Likewise, in line with international evidence, SSBs consumption is lower

among women, which is associated with dominant gender constructions that demand greater discipline from women regarding health and body aesthetics (Lupton, 1996; Freidin, 2016). The multivariate analysis also enabled a deeper understanding of the issue and highlighted the importance of incorporating an intersectional analysis. When introducing the interaction between sex and age group, age-related differences in consumption frequency decrease significantly among women. These results are consistent with studies indicating that the greater perception of invulnerability and lack of care associated with youth is conditioned by gender (Drewnowski and Rehm, 2015).

It is also observed in this chapter that the consumption of SSBs is more common among those who weekly consume other products discouraged by the GAPA, such as snacks, sweets, and bakery products, whereas it is less frequent among those who consume fruits daily. These findings suggest that the frequent intake of sugary drinks is usually part of less healthy dietary patterns, which aligns with previous research in both adult (Andrews, Hill and Cockerham, 2017) and adolescent (Cordeiro Barbosa Filho, de Campo and Lopes-Ada, 2014) populations. These findings suggest that the consumption of SSBs is part of broader eating habits; that is, it is integrated in food practices or styles that respond to cultural, economic, and symbolic logics (Cockerham, 2000, 2018).

It is important to highlight that the ENNyS 2018-2019 predates the implementation of the national Law 27,642, which establishes the mandatory inclusion of warning front-labels indicating excess of critical nutrients on food and beverage packaging, including sugar content. With this regulation, the population is expected to shift consumption patterns toward healthier products. In this regard, a survey conducted by the Ministry of Health (Ministerio de Salud, 2023) revealed that 43.6% of people consider the labels when choosing which products to buy. This percentage is higher among women and those with a university education, while it decreases among young people aged 18 to 29. That is, the population groups that, according to ENNyS, consume fewer sugary drinks were the ones who more frequently reported paying attention to the labels when shopping, according to the Ministry of Health report. Therefore, it is possible that the impact of the law on SSBs consumption will be limited, given that the people who pay the most attention to the labels already consumed these products less frequently. Likewise, it could have contributed to widening consumption differences among social groups, as those who may have changed their habits are likely to have already lower consumption of sugary drinks. More studies are needed on its impact on SSBs consumption, given the short time elapsed since the implementation of the new regulation (Britos, 2024).

In conclusion, it is important to remark that the consumption of SSBs as

part of food practices is an intermediary determinant of population health (WHO, 2010). Considering the differential socio-demographic patterns of its consumption, it can be regarded as a determinant that generates social health inequalities. Due to both high levels of consumption and the disparities in intake, it is a public health problem in the country. Hence the importance of developing public policies that help reduce its consumption and also address the social inequalities it generates in health. Measures should include mass information campaigns to accompany the National Law for the Promotion of Healthy Eating (27,642), which help interpret front-of-package labels and inform about the negative health consequences of SSBs consumption. In addition, it has been shown that tax policies have been effective in reducing consumption and prompting the industry to reformulate beverages with less added sugar (OPS, 2020; WHO, 2023; Ballesteros *et al.*, 2025). International evidence indicates that for this policy to be effective, the retail price must increase by at least 20% (IECS, 2019). This measure would help decrease total SSBs consumption as well as the observed social inequalities, since it is expected that the lower-income population would be the most likely to reduce consumption if the tax is implemented. Finally, the importance of ensuring access to drinking water inside all houses in Argentina is highlighted. This sanitation infrastructure policy would contribute to reducing SSBs consumption among the lower-income population, in addition to impacting the reduction of inequalities in morbidity and mortality due to other health issues.

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19. A journey through the plots of a social policy

by *Nadia Rizzo*

1. Introduction: the trend of state-individual connection¹

Due to their intense and long development, monetary transfers are an unavoidable component of regional social protection schemes. Their amplification occurred in the transition to the twenty-first century. In the case of Argentina, this trend towards monetarization, which marked the field of social policies, overlapped with the expansion of the social security system, in such a way that the process of “pensionization of assistance” (Arias, 2019) that took place was interesting and controversial. In addition to this trend, another of a different sign was consolidated during the period: the territorialization of assistance interventions, based on proximity relationships (Lijterman, 2023).

At the same time, the most recent transformations in national social policy have been profuse. The shift ongoing has an unusual scope. The universe of the state’s public sphere, the legitimacy of practices, the logic of state action and the subjects targeted are exposed severely. The defunding and closure of various institutional and policy areas is abrupt and pushes thresholds. Regarding social policies, those that reinforce the state-individual connection are strengthened, while those with the potential, due to their structure, to densify any territorial framework are weakened (Arias and Scaglia, 2025). This process of individuation, which had already been taking place, has become more pronounced in recent times.

¹ This chapter was elaborated in the context of the INCASI2 project that has received funding from the European Union’s Horizon Europe research and innovation programme under the Marie Skłodowska-Curie grant agreement No 101130456 (<https://incasi.uab.es>). Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them.

This paper reflects on the modes of appropriation of social policies. It is done on a capillary scale. The meanings and practices surrounding a social policy are varied once it reaches its destination and is received by the individuals and families to whom it is addressed. Having a social policy implies being part of a process that involves different areas and a large part of his or her life and that of his or her family. The purpose of the presentation is to advance in an organizing scheme of the everyday life that social policy produces, and this is done by means of a disaggregation expressed in appropriation plots.

The work dialogues with analyses centered on the everyday life of social policies. The issue of appropriation has been approached with different conceptual emphases. Soldano (2009) alludes to the “experience of reception” that recipients of social policies have; Merklen analyzes the issue from the image of “urban hunter” (2005) that is useful to think about how state resources are accessed both at the individual and collective levels; Hornes explains «the rooting of these new monetary technologies in the everyday life of recipient families» when analyzing the expansion of state cash transfers (Hornes, 2017, p. 21); Haney (2002) characterizes “the margins of maneuver” available to those who turn to welfare institutions; and Danani emphasizes that «social policies construct subjects, but also subjects construct social policies» (Danani, 1996, p. 33).

A previous doctoral work (Rizzo, 2021) is taken up while updating the literature of the field of inquiry with which dialogue has been and continues to be established². Although the doctoral research had the Asignación Universal por Hijo para Protección Social (AUH) as an empirical referent, the purpose of the analysis is to mark a shift from the singularity of this social policy to the appropriation plots present in the field of social policy. In its extrapolation, the proposed scheme offers to interrogate other public policy experiences.

² Regarding the methodological process, some central aspects are synthetically presented. The research problem was conceived from its ramifications, in its capillary dimension. The field work took place in a neighborhood in the south of the Autonomous City of Buenos Aires and in a neighborhood in the locality of Lanús, Province of Buenos Aires. I reconstructed the rooting space that a social policy has, based on extensive qualitative work. The starting point was information on daily life and multiple experiences were systematized in an analysis matrix. The empirical referent used was Asignación Universal por Hijo para Protección Social (AUH). The family and close environment of the AUH holders was recreated. Interviews were conducted with the AUH holders and with actors close to the families related to the moment of implementation of this social policy (neighborhood referents, professionals from health centers, schools and social services, and state agents). At the same time, ethnographic observations were made in community kitchens, local social services and in local state and non-state institutions that provided support to the families.

2. The appropriation plots

2.1. *The social protection plot*

The interstices and nooks of the architecture of well-being are interesting. In the singularity of the life of a family in a context of social vulnerability, the assistance and cash transfer programs capable of providing support often appear disordered and assume varied logics. This is often a cross-cutting experience: the resources of meaning that a social policy provides are developed in populations that often have a history and a present relationship with various state interventions.

This implies interpreting state action relationally; connecting the different social interventions and transfer policies that have or have taken place to the trajectory and life circumstances of a family. If observed with sufficient proximity, the arrival of a social policy does not usually result in something completely new for the families. Rather than an unprecedented incorporation, a set of heterogeneous policies tend to gravitate and leave their mark. Often there are contiguous experiences -policies that coexist in the life of a family- and past experiences -passages through previous instances that show pre-existing ties of families with state protection-.

In our country, the field of assistance does not assume an autonomous function and this is not very auspicious. Actions rarely transcend the emergency, the transitory nature and the granting of resources in the face of urgent needs. The use of artisanal devices and spontaneity in institutional practices are common. The organization of the assistance field would imply a hierarchy; a process that would require the institutionalization of priority issues, criteria, resources, target subjects and intervention processes (Rizzo *et al.*, 2021; Arias, Hiquis and Sierra, 2024,). This characteristic of the field largely explains the disorder to which I refer: the fragmentation and weaknesses present at the macro level easily find a correlation at the capillary level. The boundaries between different social policies are porous and dynamic, and when the State provides support, it does so in very disparate, necessarily mixed and even contrasting ways. As a result, families are often exposed to very dissimilar bureaucratic logics and meanings of social protection. Those who receive state assistance tend to have practical knowledge of how to navigate the state welfare system, its fragmentation and institutional fragility.

In short, in this section, reference was made to the presence of a social protection plot. A social policy usually operates after and together with other social policies. There is a dimension that is constructed and signified in the crossings with other social policies that may be present or may have been present in the households.

2.2. *The situational plot*

There are policies of low intensity in terms of face-to-face interactions and characterized by a certain automatism. They are based on compliance with administrative guidelines and interactions with technical devices. The cash transfer paradigm falls within this framework. There are other policies that, on the contrary, require numerous interactions, intermediations, accreditations and greater proximity with the institution and the state agents that manage it.

But in any case, it is possible to identify a situational plot that shapes a social policy and that is present in the daily life of families. Many social links can be analyzed from the point of view of the scenes that compose them, from their dramaturgy; the links produced by transfer policies can also be studied in this way. When it is in the hands of the actors who play the leading role, a policy has a dramatic representation, there are settings, characters and scripts. The distance or the approach that a policy engages does not suppress this plot, it simply changes institutional logics and repertoires. The analytical gesture of reconstructing the situational plot brings nuances to the analysis of social policy. At the moment of implementation, the following usually interact: the recipients, the state agents who carry out different tasks and those I refer to here as informal operators.

For the recipients, who make the looks at the windows and state offices, the perception of a transfer may involve assimilation and learning. These policies incorporate material resources into daily life, but their implementation does not imply automaticity; rather, in doing so, they produce “learning and relationships” (Cravino *et al.*, 2001, p. 58). As for state agents, they are the ones who occupy the front lines of state management. Approaching the analysis of social policies from their institutional scenarios in order to reconsider the actions of their workers is a point of view that allows us to explore interesting elements: the margins of autonomy, decision-making processes, habitual practices and the functioning of organizational mechanisms. The density of this type of practices is an aspect analyzed in the field of social protections (Bourdieu, 2007; Perelmiter, 2016; Dubois, 2021). When speaking of informal operators, I refer here to people close to the recipients who, in relation to a transfer policy, execute small unplanned actions. Their presence is infinitesimal: an advice, a piece of information, a contact, a map to reach an office, an indirect collaboration that was unnoticed even by themselves. They have no official hierarchies: their involvement was *de facto* and their actions appear as natural, without artifice in what they do. Their actions are invisible, operating underground. It is a horizontal network that, without defining it, facilitates the management of the policy in question, provides information and attributes meanings and representations.

These actors -recipients, state agents and informal operators- have characteristic repertoires, itineraries and movements. They also have assimilations and lessons learned that they have incorporated over time. There is a daily action and it is possible to reconstruct its backroom, which is nothing more than the social life that the programs have when they are in the hands of those who are their recipients. This social life always overflows and strains the designs themselves, the foundations and the regulatory frameworks.

In this section, reference was made to the presence of a situational plot that enlivens the face-to-face encounters between those who are the protagonists of socio-state interventions. That is to say, there is a dimension of collective appropriation of a social policy that is constructed and signified in the daily interactions that take place in the bureaucratic institutions that concretize a social policy as well as in the immediate context of the families.

2.3. The gender plot

A maternalist bias typically runs through the paradigm of conditional transfers oriented to health and education actions, aimed at families throughout the region. Priority is given to female ownership; added to the argument that this design favors female empowerment, the main assumption is that women make better use of the benefit in favor of their children. State intervention reinforces the intertwining of cash transfers and maternity. These are the structuring principles, but how do they operate in the daily lives of men and women as actors conditioned by the gender order?

The practices and experiences that men and women have in relation to state action can be profiled from the point of view of gender: they do not usually share experiences or have identical repertoires. The relational game that arises, based on differential practices and experiences, brings richness to the analysis of social policies on a daily scale.

Women often play the leading role that is formally granted to them. To such an extent that it seems that defining them only as holders does not do justice to the role they truly occupy: in the universe of cash transfers they are usually the “legitimate doers” and “the observed ones”. They are empowered to act and are effective in appropriating a framework of relationships and shared meanings. Part of this empowerment to act has to do with the fulfillment of caregiving tasks, which are framed within the conditionalities required by social programs. Somehow, women find formality in care tasks; deeply known tasks that, however, with the transfer carry state seal and the “solemnity” (Bourdieu, 2014, p. 203) given by the state. On the other hand,

the destination of money is usually an arena about which there is no social inhibition in having an opinion. Women, as administrators, are often “observed”, adjectivized and judged according to “the good or bad use” that, it is assumed, they would make of the economic transfer. Appreciations to which women were exposed and were exposed according to whether or not they exercised supposed qualities linked to motherhood. It is common for criticisms of the uses of money to be framed in terms of gender.

At the same time, men tend to assume the lack of protagonism that the design of these policies grants them. As outsiders to this universe and as partners of the recipients, they let women do as they please. They are true guests of stone in the microcosm of the conditional transfer policy. In the specific literature, this secondary place appears little studied, as well as the cases in which, via widowhood exception or judicialization, they themselves are the holders of the transfer. The feeling of undermining the mandate to provide for the family with the income obtained through work in order to guarantee subsistence, while exposing the absence of a woman-mother in charge of the tasks and management required by social policy, are aspects present in the experiences of those who, due to exceptional situations, are the holders.

In short, the gender plot specifies the link between a social policy and socially established gender roles. In other words, there is a dimension of the collective appropriation of a social policy that is constructed and signified in relation to the gendered nature of the practices and experiences present in the daily lives of the recipients and their families.

2.4. The material plot

The monetary resource provided by a cash transfer policy can only assume a complementary character. It is a piece of money that is linked to the fundamental supports in the maintenance of households: income from informal jobs, assistance from family networks, income from other social security schemes and multiple precarious work strategies. Money is rooted in the arduous gear that seeks to guarantee day-to-day subsistence, a resource that was used in the midst of the uneasiness of having to make permanent efforts and the uncertainty of what will be able to be done to survive in the immediate future. It is experienced, in this sense, indifferently: as one more source of income, capable of complementing a varied set of family life strategies.

At the same time, transfer money usually translates into secure consumption, acting as a “general support”. Money that carries, in this sense, a relational quality: when other resources have the mark of instability, the certain,

regular character and the expectation of continuity of transfer money appears as its most outstanding feature. It was not an attribute in itself, but was drawn from contexts of extreme precariousness. It can provide, through its regular presence, a minimum of predictability in scenarios where uncertainty and instability abound. The clearest consequence is its impact on the organization of families' daily lives and greater predictability in certain consumption.

The material plot is a category that specifies the ways in which the money of a social policy is interwoven into the life strategies that families develop in contexts in which they live with very few certainties on a daily basis. In other words, there is a dimension of the collective appropriation of a social policy that is constructed and signified, in an inseparable way, together with family life strategies and that, at the same time, is relational since it arises from the conditions of structural fragility to which families in popular sectors are exposed.

3. Final reflections on the concept of appropriation

Every social policy delimits a social problem, defines the recipients, specifies a mode of intervention on that problem and prescribes the guidelines that those who are recipients must comply with in order to remain so. A set of operational guidelines and conceptual foundations are thus laid out. In short, «public policy paradigms are a relatively articulated set of propositions about reality and how it should be addressed» (Martínez Franzoni, 2008, p. 26). But just as there is a specific way in which every social policy constructs the addressees, the social problem and the state response to that problem, there is also a tone in which the addressees make those precepts their own.

We define collective appropriation as the idea that a social policy becomes a component of a larger relational framework, made up of different types of state links, encounters and movements in the immediate environment, support networks, gender-oriented experiences and subsistence resources that are sought and deployed in an effort to survive in very fragile contexts. The category reflects a social fact: it is not a margin of freedom of the individual but a warp, collectively generated and sustained over time, in which issues that occur in the final stage of a social policy are interwoven, issues that attain public status and that, therefore, are not mere representations unilaterally wielded by the people to whom they are addressed.

At the same time, it functions as an organizer of the small, the fragmentary, the anecdotal and the detailed that, in relation to a social policy, takes place on a daily basis. It reflects the capillary embedding of social policy in the daily life of families in popular sectors and, therefore, does not

distinguish a link between the people targeted and social policy that can be cut linearly; the relational framework of which social policy is a part is, in this way, compact.

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This volume examines the transformations of public policies and welfare institutions in Europe and Latin America from a comparative and interdisciplinary perspective. Drawing on the theoretical and empirical advances of the INCASI Project, it explores how states, social actors, and policy regimes have reconfigured their responses to inequality in the face of multiple crises – economic, social, environmental, and technological.

The chapters gathered here offer a multidimensional view of public policy, combining macro-structural analyses of welfare and labour regimes with micro-level studies of care, education, and digital work. They reveal the persistent tensions between state intervention, market dynamics, and social demands for equality, as well as the emergence of new institutional complementarities between predistributive and redistributive policies.

Bringing together contributions from researchers across Europe and Latin America, the book provides a critical dialogue on the future of welfare, the redefinition of social rights, and the governance of inequality in an era of digitalisation, migration, and global uncertainty. It invites readers to rethink the role of public policy as a field of democratic innovation and transnational cooperation.

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