

Pedro López-Roldán
Sandra Fachelli *Editors*

Towards a Comparative Analysis of Social Inequalities between Europe and Latin America

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Pedro López-Roldán • Sandra Fachelli
Editors

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Editors

Pedro López-Roldán
Sociological Research Center on Everyday
Life and Work - Institut for Labour Studies
Autonomous University of Barcelona
Barcelona, Spain

Sandra Fachelli
Department of Sociology
Pablo de Olavide University
Sevilla, Spain

Education and Work Research Group
Autonomous University of Barcelona
Barcelona, Spain



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Editors and Contributors

About the Editors



Pedro López-Roldán has a degree in Economics and Business Studies from the *Autonomous University of Barcelona* (UAB); advanced degree in *Mathématiques, Informatique et Applications aux Sciences de l'Homme* (with option *Statistique et Modélisation dans les Sciences Sociales*), *École des Hautes Études en Sciences Sociales* of Paris; and Ph.D. in Sociology, Department of Sociology, UAB. He is associate professor, Department of Sociology (UAB); researcher at the Sociological Research Center on Everyday Life and Work (QUIT), *Institute for Labour Studies* (IET), UAB; and Coordinator of the Master in Applied Social Research Methods (TISA). His main lines of research are (1) social research methods: multivariate data analysis, typological construction, and mixed methods, and (2) sociology of labour and social inequalities: labour market segmentation, gender and immigration; labour trajectories; stratification and social mobility; and comparative sociology between Europe and Latin America. Personal web: <http://pagines.uab.cat/plopez/content/cv>.
Main Coordinator of the INCASI Project.



Sandra Fachelli is Postdoctorate in Social Science from the University of Buenos Aires (UBA), PhD in Sociology from the Autonomous University of Barcelona (UAB), Diploma of Advanced Studies in Sociology, Master in Introduction to Research in Sociology (UAB), and Master's in Design and Management of Policies and Social Programs (FLACSO Argentina). She has a BA degree in sociology from the University of Argentina John F. Kennedy. She is Associate Professor at the Department of Sociology of Universidad Pablo de Olavide, Sevilla, and a researcher in the Labour and Education Research Group (GRET) of the Autonomous University of Barcelona. She is member of the Academic Commission and task manager of the INCASI Project, and she is teaching coordinator and professor of the Master's Programme in Applied Social Research Techniques (TISA) that are co-coordinated by UAB and UB. Her main lines of research are inequality, stratification and social mobility, higher education, and employment.

Contributors



Karina Batthyány has a Ph.D. in sociology from the University of "Versailles Saint Quentin en Yvelines" (France). Since 1992, she is a professor at the University of the Republic (UDELAR). She is currently a full-time professor and researcher at the Department of Sociology from the Faculty of Social Sciences of the University of the Republic (Uruguay) and the Executive Secretary of CLACSO. She teaches research methodology and gender sociology. Between 2010 and 2017, she was the coordinator of the Master in Sociology. She is also a member of the National Research System Level II. Furthermore, she is consultant of several international organizations such as ECLAC, UnWomen, ILO, and EuroSocial and author of numerous publications on the topics of social welfare, gender, public policies, unpaid work, and care.



Emmanuelle Barozet is a full professor in the Department of Sociology at the University of Chile; sociologist, with a graduate degree from the Institut d'Etudes Politiques de Paris, Sciences Po (1994); master's in history and civilization (1995); and doctorate in sociology (2002) from the Ecole des Hautes Etudes en Sciences Sociales in Paris, with a specialization in the Latin American area and especially Chile, where she lives. She did her postdoctoral research in Chile and Bolivia. Her research areas are social stratification, inequality, and especially middle classes. She led research projects such as FONDECYT and joint projects such as Project Inequalities (Anillo SOC 12), funded by CONACYT-ANID. She also has experience in university management: head of the graduate school of the Faculty of Social Sciences (2007–2008), head of the Doctorate in Social Science at the University of Chile (2009–2013), and head of the MECESUP UCHILE 1108 fund (Chilean Ministry of Education) for the same program (2012–2014). Currently, she is as principal researcher at the Centre for Conflict Studies and Social Cohesion (COES, www.coes.cl).

Principal Researcher of the INCASI Project (Universidad de Chile).



Paulina Benítez has studied Social Work from 1977 to 1981 and Commercial Engineering from 1994 to 2000 at the University de Concepción (UdeC) in Chile. Between 2006 and 2009, she pursued a social sciences and policy master program. From August 2013, she has joined a social sciences Ph.D. program at the Faculty of Social Sciences of the University de Buenos Aires (UBA) (Argentina). She studies the social implications of New Technologies of Information and Communication (NTIC). Since 2005 she teaches economics, management, planning, and social development and evaluation of social projects in social work.

Principal Researcher of the INCASI Project (Universidad de Concepción).



Marcelo Boado holds a Ph.D. in Sociology from the University Research Institute of Rio de Janeiro (IUPERJ) of Candido Mendes University of Rio de Janeiro. Since 1985, he has been teaching at the University of the Republic (UdelaR). He is currently professor and researcher in the Department of Sociology at the Faculty of Social Sciences (FCS). He teaches social structure of Uruguay, dropout, inequality, and social mobility. He also teaches methodology (loglinear models) in BA, Master, and Doctorate in Sociology. He is currently the Head of the Department of Sociology. He has been coordinating the Doctorate of Sociology from 2010 to 2013 and the Master of Sociology from 2003 to 2010. He is also a researcher at the National Research System Level II, the National Agency for Innovation and Research.

Principal Researcher of the INCASI Project (Universidad de la República).



Eduardo Chávez-Molina Argentine-Chilean, is Researcher at the Gino Germani Research Institute, Faculty of Social Sciences, University of Buenos Aires; Doctor of Social Sciences in Latin American Social Sciences Institute; Master of Political, Social Assessment, and Management, Latin American Faculty of Social Sciences (FLACSO-Argentina); and BA in Sociology from the University of Buenos Aires. He is associate professor of the seminar “Structure, classes and social mobility,” Career of Sociology, University of Buenos Aires, Professor Regulate Associate “Structure and social change” Race of Sociology, National University of Mar del Plata, Professor “classes, structure and social mobility: notes for a contemporary analysis,” Doctor of Social Sciences, University of Buenos Aires, Professor seminar “structure and social change,” and Master of Human Rights, National University of San Martin.

Principal Researcher of the INCASI Project (Universidad de Buenos Aires).



Pablo Dalle is doctor in social sciences from the University of Buenos Aires. He also obtained a master's in research in social sciences and a bachelor's degree in sociology from the University of Buenos Aires. He is researcher and professor of sociology at the University of Buenos Aires and IDAES (San Martin University). He is a researcher at the National Council of Scientific and Technological Research (CONICET) in the Gino Germani Institute—UBA. He was Visiting Researcher and did postgraduate seminars in the University of California, Berkeley (2012/2013). His research interests include social classes, stratification, social mobility, and relationships between class and ethnicity.



Màrius Domínguez-Amorós is associate professor, Department of Sociology at the University of Barcelona, and member of Research Interuniversity Group COPOLIS “Welfare, Community and Social Control,” attached to the University of Barcelona. His research interests are in the fields of social indicators; social research techniques; multivariate analysis; analysis of social inequalities; and time, work, everyday life, and welfare. He is currently involved or has been involved in different researches on these fields. And he has published several books and journal publications. He is coordinator of the Master in Techniques in Applied Social Research (Autonomous university of Barcelona, University of Barcelona and Official College of Sociologists and Politicians of Catalonia) and member of several associations in the field of sociology. He is the Vice-President of the Spanish Federation of Sociology (FES). <https://mariusdominguez.wordpress.com/>

Principal Researcher of the INCASI Project (Universidad de Barcelona).



Vincenzo Fortunato is associate professor at the Department of Political and Social Sciences—University of Calabria—in the area SPS/09 (Sociology of Labour and Economic processes). 1998–2000: Department of Sociology and Political Science—University of Calabria Ph.D. in Sociology (Science, Technology, and Society). 1996–1997: University of Warwick Coventry (UK)—Master in European Industrial Relations 1989–1995: University of Calabria—Rende (CS)—BA in economic and social sciences. Research interests: industrial relations, human resource management, labor organization, social work and international social policies, and non-profit organizations. Teaching activities: Course of “Labour and Organization” (9 CFU)—degree course of administration sciences (BA), Department of Political and Social Sciences, and Course of “Sociology of Organization” (6 CFU), a degree course of sciences of policies and social services (MA), Department of Political and Social Sciences.

Principal Researcher of the INCASI Project (Università della Calabria).



Julie Jarty is associate professor in Sociology. In 2010, she completed a European Ph.D. at the Autonomous University of Barcelona (Spain) and the University of Toulouse-Le Mirail (France) on gender inequalities in the French and Spanish teaching professions. She was assistant professor at the University of Lausanne (Switzerland) where she taught gender studies. Since 2012, she is an associate professor in sociology at the University of Toulouse Jean Jaurès and a member of the *SAGESSE* gender research group at CERTOP, CNRS Joint Research Unit. She is currently co-heading the Master GEPS (Gender, Equalities, and Social Policies) and coordinating the European Master in Equality and Gender Studies (EGALES). Her current research focuses on the comparative analysis of the effects of social policies on gender inequalities in relation to other inequalities; on the analysis of social actions and change levers to fight gender inequalities and assignments in different workplaces and social areas (especially at school); and on the role of feminist actresses in social transformations and their action modes.

Principal Researcher of the INCASI Project (Université de Toulouse Jean Jaurès).



Idefonso Marqués-Perales is Doctor in Sociology, Pontifical University of Salamanca, Spain (2005). His thesis is on “Genesis of Pierre Bourdieu’s social theory” (*Génesis de la teoría social de Pierre Bourdieu*). He is an associate professor of the University of Seville. His subjects are general sociology, sociology of education, and social structure.

He was assistant researcher in sociology of the Andalusian Studies Centre (from January 2008 to September 2009) and a reader professor of social sciences in the university assigned to labor relations, tourism, and social work (University of Cádiz) (2000–2008).

Principal Researcher of the INCASI Project (Universidad de Sevilla).



Antonio Martín-Artiles is university professor at Autonomous University of Barcelona (UAB). He is the director of Institute for Labour Studies (IET) at the UAB. He studied at the Institute Superior of Social Sciences of Barcelona (ICESB) where he received a bachelor’s degree in social science and also at the University of Barcelona where he obtained a bachelor’s degree in history and cultural anthropology. Afterward, he obtained a Ph.D. in Sociology at the Autonomous university of Barcelona (UAB) in January of 1991 with the thesis “Flexibility and Labour relations” (*Flexibilidad y relaciones laborales*). He is teaching sociology at the Autonomous University of Barcelona as a full professor. For many years, he worked as researcher with trade unions. His studies are bachelor’s degree in social science, bachelor’s degree in history and anthropology, and Ph.D. in Sociology. His academics responsibilities are/were Coordinator of the sociology master (1994–1996), Vice-Dean of Academic Organization in the Faculty of Sciences, Director of the Sociology Department (1996–2000), Coordinator of the Master in Labor and Social Politics (2005–2008), Coordinator of the Master in Social Politics, Labor, and Gender (since 2012), and Coordinator of the Master Program of the social sciences and sociology.



Rafael Merino is a lecturer at the Department of Sociology of the Autonomous University of Barcelona. He gives lectures on sociology of education, both in undergraduate (bachelor's in social education, bachelor's in educational studies) and postgraduate (master's in secondary teaching, master's in youth studies and society) levels. He is the director of the Education and Work Research Group; he does research in school-to-work transition, secondary school and vocational training, educational policy, and skills learning in nonformal ways. He has published articles in Spanish scientific journals (such as *Revista de Educación*) and in international journals too (such as *Education Policy Analysis Archives*), and he has produced reports commissioned by public bodies and other stakeholders to promote the knowledge transfer to the community. He belongs to the International Study of City Youth, he has founded the Spanish Research Network of Youth and Society, and he is the secretary of Youth and Society research group of the Spanish Federation of Sociology. He is involved as an expert in the Youth Partnership of Council of Europe to promote youth work and youth policy.

Principal Researcher of the INCASI Project (Universidad Autónoma de Barcelona).



Fausto Miguélez is university professor at Autonomous University of Barcelona (UAB). He studied at the Social Science Institute of Roma where he received a bachelor's degree in sociology and at the University of València where he obtained his bachelor's degree in philosophy and letters. Afterward, he obtained a Ph.D. in History at the Autonomous University of Barcelona (UAB) on June 1977 with the thesis "Labour conflict and factory condition. The case of the SEAT company." As a researcher, he is currently involved in research around the social structure, industrial relations, labor market policies, and the relationship among time, work, and everyday life. Special attention is paid in his research activity to the new demands of reorganization of time, with reference to the reconciliation between working time and family time. Some of his research is devoted to the crisis of employment, with special reference to work organization, flexibility, digital revolution, and the changes in the labor market.



Leticia Muñiz is a Researcher at the National Council of Scientific and Technical Research. She is a professor in the Sociology Department of the Institute for Research in Humanities and Social Sciences at the Faculty of Humanities and Education Sciences (FaHCE), National University of La Plata (UNLP). Her subjects are methodology of social research II (qualitative). She is professor in Ph.D. in Social Sciences at FaHCE/UNLP. Her subjects are seminar of thesis II. She is member of Interdisciplinary Centre for Methodology of Social Sciences. She has a Ph.D. in Social Sciences from the University of Buenos Aires (December 2009) and a magister in social sciences of labor at the University of Buenos Aires (September 2007). She is teacher in sociology, Faculty of Humanities and Education Sciences, National University of La Plata (December 2003). She got a degree in sociology at the Faculty of Humanities and Education Sciences, National University of La Plata (April 2002). Her research interests are labor path, managerial restructuring, gender, generation, social classes, and research methods: qualitative research—life history and methodological approaches linked to the labor studies.

Principal Researcher of the INCASI Project (Universidad Nacional de La Plata).



Eriikka Oinonen is main researcher at SOC/TAU, sociologist with a doctorate in sociology, adjunct professor in sociology and senior lecturer in social sciences at the University of Tampere (Unit of Pori), Finland. Her research focuses on different aspects of transition from youth to adulthood, family institution, sociology of personal life, and cross-national comparative research. Methodologically, her interests also lie in different ways of applying visual and narrative methods and ways to use fiction in social scientific research and teaching. Currently, she works on the research project *From university to (work) life* studying transition of university graduates to work and life in contemporary Europe and Coming of age in the times of COVID-19. During her academic career, she has coordinated and worked with several national and international projects and networks. She is a member of the editorial board of the *Finnish Journal of Youth Research (Nuorisotutkimus)* and of the advisory board of the *Journal of Youth and Globalization*.

She is an active member of several national and international associations and research networks such as the Finnish Association of Work-Life Research, Finnish Youth Research Society, ESA Youth and Generation Research Network, and ESA Sociology of Families and Intimate Lives Research Network.

Principal Researcher of the INCASI Project (Tampereen Yliopisto).



Laura Oso is Professor in the Faculty of Sociology of the University da Coruña. She is the coordinator of ESOMI (Spanish initials for International Migration Sociology Research Team) since 2011 and doctor of Sociology at the Université de Paris I-Panthéon-Sorbonne (2002) and at the University da Coruña (1997). Her research has essentially been focused on the study of gender and migration. She has been consultant for a variety of international organizations (OECD, European Union, UN-INSTRAW) and has been visiting professor in the United States, France, and Latin America (University of California, Berkeley, Université de Paris I-Panthéon-Sorbonne, Université de Paris VII, Flacso Ecuador, Universidad de Buenos Aires). She coordinates the Migration, Gender and Development Network and she is a member, since 2013, of the Board of Directors of the IMISCOE—International Migration, Integration and Social Cohesion Network. Since 2013, she is also a member of COST Action (European Cooperation in Science and Technology) Postpol (IS1209) “Comparing European Prostitution Policies: Understanding Scales and Cultures of Governance.”

Principal Researcher of the INCASI Project (Universidade da Coruña).



Graziela Perosa holds a doctorate in education from the State University of Campinas (2005) and MA in School Psychology and Human Development at the University of São Paulo (1998) and is a graduate in psychology from the Catholic University of Campinas (1992). During the doctorate, she interned at School for Advanced Studies in the Social Sciences in Paris (2002–2003). She did postdoctoral studies at the University of Cadiz (2008–2009). She is currently a professor at the University of São Paulo, School of Arts, Sciences and Humanities (EACH). She has experience in the area of education, with an emphasis on sociology of education and culture, acting on the following topics: education and social stratification, social mobility, gender relations, expansion of the education system, and learning of social differences. She is a professor of the Graduate Program in Cultural Studies at EACH and researcher at the Interdisciplinary Centre for Public Policy (OIPP/EACH/USP).

Principal Researcher of the INCASI Project (Universidade da São Paulo).



Jordi Planas is university professor of Sociology at the Autonomous University of Barcelona (UAB), with a degree in economics and Ph.D. in Sociology, and Researcher of GRET (Group of Research on Education and Work of the UAB) for 30 years, being its Principal Investigator for 22 years. He has been a visiting professor at the universities of Toulouse 1 (FR), La Sapienza (Rome IT), CNAM (Paris FR), London (UK), and Guadalajara (MX). He has also been a European Officer in CEDEFOP (Thessaloniki GR) and Director of Research of the National council for scientific research (“Conseil National de la Recherche Scientifique (CNRS)”). He is author of numerous publications (articles, books, and book chapters) on the relationship between education, training, and work in Catalan, Spanish, English, French, Italian, German, and Portuguese.



Gabriela Rubilar is a researcher and a specialist in public policies and social programs aimed at overcoming poverty and social exclusion. Her research interests are social exclusion; social policies aimed at vulnerable groups; research work of social workers; and qualitative research (<http://ciir.cl/persona/gabriela-rubilar/>). She is currently coordinator of the Nucleus Social Policies and Public Policies, oriented to the debate about social policies in Chile and Latin America, with an emphasis on comparative analysis of income transfer systems, and sectoral policies on education, housing, health, and the environment. She is a researcher of the line of public policy at the Center for Indigenous Studies and Intercultural CIIR, project associated with the Catholic University.

Principal Researcher of the INCASI Project (Pontificia Universidad Católica de Chile).



Agustín Salvia is main researcher at CONICET, sociologist with a Ph.D. in social and political sciences, and doctor of social sciences. He is Director of Research at the Observatory of the Social Debt (Argentina) (*Observatorio de la Deuda Social Argentina*) from the Catholic University of Argentina and Director of the Program Structure Change and Social Inequality (*Cambio Estructural y Desigualdad Social*) in the Gino Germani Research Institute (*Instituto de Investigación Gino Germani*) from the Social Sciences School of the University of Buenos Aires. He is a university professor in research methodology and techniques in social sciences at the undergraduate and graduate level at the University of Buenos Aires, FLACSO Argentina, UCA, among others; coordinator of the CLACSO Working Group: Structural Heterogeneity and Social Inequality in Latin America; independent expert of the OAS Working Group for the evaluation of the Protocol of San Salvador (GTPSS); and principal researcher of the INCASI Project (Universidad Católica Argentina).



José Saturnino Martínez García is a Professor of Sociology at the University of Laguna and author of *Social Structure and Inequality in Spain* (La Catarata 2013). He graduated in political sciences and sociology (University Complutense), is Master of Economics of Education and Labour (University Carlos III), and is Doctor of Sociology (Autonomous University of Madrid). He is an expert in inequality and education. He has been a researcher at the Center for Sociological Research at the University Complutense and the University of Salamanca. He has spent periods of research in the Department of Sociology at the University of Wisconsin (Madison) and several Spanish universities. He has taught at the University de Salamanca and the Center for Sociological Research (CIS). Between 2007 and 2011, he was a senior adviser in the staff of Spanish President Rodríguez Zapatero. It has also made reports or advised the Ministry of Education, Government of Andalusia, the Youth Council of Spain, Save the Children, Caritas, or the Canary Government. His research, conducted within the framework of competitive research projects, has been published in academic journals such as *Revista de Educación*, and *Revista Internacional de Sociología* and papers, and he collaborates with various media such as *El País*, *Cadena Ser*, *Diario.es*, *Infolibre*, *Escuela*, or *Le Monde Diplomatique*.

Principal Researcher of the INCASI Project (Universidad de La Laguna).



Patricia Scarponetti is doctor in law and social sciences, Faculty of Law and Social Sciences, National University of Córdoba (Argentina); master's in interdisciplinary social science, Research Centre for Social integration—CIJS—program of the Secretariat of Public Education of the Government of Mexico, DF, Mexico; lawyer, Faculty of Law and Social Sciences, National University of Córdoba. **Current position:** Associate professor by competition matter Argentina and Latin American social theory with a bachelor's degree in sociology, National University of Villa María; Associate professor by competition matter legal sociology, Faculty of Law and Social Sciences, Research Center for Legal and Social Research, National University of Córdoba; Director of the Master of Sociology, Centre for Advanced Studies, CEA-UNC; Director of the Master of Research and Public Safety Management, UNVM; Category I

teacher incentive program's national researcher; and Director of various research teams in the area of problem of relocations of vulnerable sectors and situations of habitat and violence and universal allocation policy per child impact assessments.

Principal Researcher of the INCASI Project (Universidad Nacional de Córdoba).



Renata Semenza is professor of economic and labor sociology at the University of Milan, Department of Social and Political Sciences (SPS); coordinator of the European Master in Labour Studies (MEST-EMLS); Ph.D. in sociology at the University of Pavia and two-year post-doc research fellowship at the University of Torino; graduate in humanities at the State University of Milan and two-year degree in psychology at the Catholic University of Milan. She has been a researcher at IRES (Economic and Social Research Institute of the Italian General Confederation of Labour) and IRS (Institute for Social Research), both in Milan. She has been Visiting Scholar at the Sloan School of Management, M.I.T., Cambridge, USA, and Professeur Invité at the Observatoire Sociologique du Changement (CNRS-Science Po, Paris).

Her most recent scientific interests are the new forms of work and the digital economy, in particular self-employed professionals in a cross-country perspective; labor market segmentation and employment inequalities; and institutional change of higher education systems in Europe.

As an expert in comparative labor market analysis and employment inequalities, she has coordinated many European projects, and recently, she was principal investigator of the project “Independent Workers and Industrial Relations in Europe”—I-WIRE (VS/2016/0098) and principal researcher of the INCASI Project (Università degli Studi di Milano).



Leandro Sepúlveda is an associate professor at the Centre for Enterprise and Economic Development Research (CEEDR) at the Middlesex University Business School. He holds a Ph.D. in Economics from the University of Durham (UK). He has nearly 20 years' experience in research specialized in enterprise, entrepreneurship, and social and economic development. His current research interests include social inequalities in Europe and Latin America; self-employment,

entrepreneurship, and support programs; population diversity and socioeconomic development; and small business development, clusters, and public policy in developing countries. His work in the UK and Europe has been commissioned by public agencies including the Department for Business, Innovation and Skills (BIS) and the Economic and Social Research Council (ESRC), in the UK, and the European Commission through EQUAL and Horizon2020. Leandro worked in Latin America as an external consultant for the United Nations Economic Commission for Latin America and the Caribbean (ECLAC-UN).

Principal Researcher of the INCASI Project (Middlesex University).



Patricio Solís holds a Ph.D. in Sociology from the University of Texas at Austin (2002), obtained a master's in Population from the Latin American Faculty of Social Sciences, México, in 1995, and obtained a Bachelor's Degree in Sociology from the Autonomous University of Nuevo León. His research focus on stratification, social inequality, and the life course.

Principal Researcher of the INCASI Project (El Colegio de México).



Joan Miquel Verd is an Associate professor in the Department of Sociology at the Autonomous University of Barcelona (UAB). Graduate in Political Science and Sociology (1994), Degree in Economics and Business Studies (1996) and Ph.D. in Sociology from the UAB in 2002. Director of the Centre for Sociological Studies on Daily Life and Work (QUIT) and researcher and member of the management team of the Institute for Labour Studies (IET, <http://iet.uab.cat/>) at the UAB. President of the Research Committee 01 Methodology of the Spanish Federation of Sociology between 2013 and 2020. Secretary of the Department of Sociology at the UAB from 2008 and 2018. He has been a scientific advisor to the Catalan Agency for University Quality (AQU) in its survey of employers and has developed research projects for the Youth Observatory of Catalonia (OCJ) and the Sub-Directorate General of Occupational Health and Safety of Catalonia (SGSSL).

Part I
Introduction

Chapter 1

A General Model for the Comparative Analysis of Social Inequalities Between Europe and Latin America



Pedro López-Roldán and Sandra Fachelli

Abstract The chapter is an introduction to the book that places the research perspective for the comparative analysis of social inequalities between Europe and Latin America in a theoretical and methodological framework. Particularly, we present the INCASI project, the objectives, and discuss the concept of social inequalities in Latin American countries in comparison with European countries in order to create a dialogue that fills the knowledge gap between these two different traditions. To do so, we propose an Analytical Model on Social Inequalities and Trajectories (AMOSIT). Finally, the structure and general contents of the book are presented.

Keywords Social inequalities · INCASI project · Latin America · Europe · Analysis model · AMOSIT

1.1 Introduction

This first chapter is an introduction to the book that places the research perspective for the comparative analysis of social inequalities between Europe and Latin America in a theoretical and methodological framework. Particularly, we present the INCASI project, the objectives, and discuss the concept of social inequalities in

P. López-Roldán (✉)

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: Pedro.Lopez.Roldan@uab.es

S. Fachelli

Departamento de Sociología, Universidad Pablo de Olavide, Sevilla, Spain

Grupo de Investigación en Educación y Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: sfachelli@upo.es

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Latin American countries in comparison with European countries in order to create a dialogue that fills the knowledge gap between these two different traditions. To do so, we propose an Analytical Model on Social Inequalities and Trajectories (AMOSIT).

In this framework, our research shows two types of findings that are the underlying “leitmotif” of our contributions. On the one hand, we present the specificity of the cases studied, and the particular factors that explain the configuration of social inequalities in each social space are argued, whether for historical reasons, institutional configuration, the different levels of development and productive structure, etc. On the other hand, we highlight the existence of general patterns that jointly explain the dynamics of social inequalities in both continents, thereby identifying the social mechanisms that generate and reproduce social inequalities.

We combine static and dynamic analyses as we seek to establish certain converging trends over time. Furthermore, the comparative study of the two continents involves a dynamic of reflection and analysis to produce innovative results that can be used to theoretically and empirically readdress social inequalities. At the same time, it helps us to elaborate diagnoses that base decision-making on socio-political action. This book is the first such set of contributions to have been developed in the context of the INCASI project.

1.2 The INCASI Project

This book is published in the context of the INCASI (International Network for Comparative Analysis of Social Inequalities) research project,¹ funded by the Horizon 2020 programme of the European Commission, Marie Skłodowska-Curie Actions (MSCA), Research and Innovation Staff Exchange (RISE), Project Number 691004. The overall aim was to create and consolidate a research and training network between Europe and Latin America, for which purpose a project titled “Global trends in social inequalities in Europe and Latin America and exploring innovative ways to reduce them through life, occupational and educational trajectories research to face uncertainty” was carried out from January 2016 to December 2019. This network is made up of more than 165 researchers from 20 universities in 10 different countries: five from Europe (Spain, Italy, France, Great Britain and Finland) and five from Latin America (Argentina, Chile, Uruguay, Brazil and Mexico)² who directly participated in research stays (secondments).

¹ See the network’s website: <http://incasi.uab.cat/en>, and that of the European Commission: <https://cordis.europa.eu/project/id/691004>

² INCASI universities from Europe are: Universitat Autònoma de Barcelona (UAB) as the coordinating university, Universitat de Barcelona (UB), Universidad de Sevilla (US), Universidade da Coruña (UDC), Universidad de La Laguna (ULL), Middlesex University (MDX), Tampereen Yliopisto (UTA), Università degli Studi di Milano (UNIMI), Università della Calabria (UNICAL), Université de Toulouse Jean Jaurès (TLSE2). Those from Latin America are: Universidad de

The purpose of this network is to conduct comparative research in the area of social inequalities in the hope of fostering a space for collective reflection and the development of synergies between network partners in order to undertake innovative studies whose outputs will have an impact on academic and policy debates on the subject. The project will also inform the design of public policies to tackle social inequalities. In so doing, we aim to contribute innovative solutions that will improve living standards, reduce social inequalities and promote social justice. This is in line with Horizon 2020s objectives which state that “*current trends at play in European societies bring with them opportunities for a more united Europe but also risks and challenges. These opportunities, risks and challenges need to be understood and anticipated in order for Europe to evolve with adequate solidarity and cooperation at social, economic, political, educational and cultural levels, taking into account an increasingly interconnected and interdependent world*” (Official Journal of the European Union 2013).

From this perspective, the whole project was structured on the basis of four pillars: substantive background and explanatory models of social inequalities which comprises seven thematic axes, methodology for the analysis of social inequalities, social policies to counteract social inequalities and a cross-cutting perspective on gender inequalities.

The interests and research objectives that converge in the INCASI network and which constitute the basis for knowledge creation and exchange are as follows:

1. To develop a general framework for collaboration and the formation of a research network between European and Latin American universities and research centres.
2. To analyse the trajectories that citizens have followed in the labour market, identifying their outcomes in terms of mobility and social inequality. Using this knowledge, the aim was to develop a model that explains these trajectories in comparative terms between Latin America and Europe.
3. To identify and understand the different coping strategies that have been developed and how resources and capabilities have been mobilised to identify, classify and compare patterns of social behaviour adopted to cope with uncertainties in each region.
4. To specifically study these trajectories and coping strategies by analysing the relationship between work, training and employment, and the connection between life trajectories and education, including the productive and reproductive spheres. These will also be examined in comparative terms.
5. To examine a range of social, economic, employment and education policies that have sought to tackle inequalities in the aforementioned areas. The focus will be on participating countries, and more generally on addressing these issues in a comparative context between Europe and Latin America.

Buenos Aires (UBA), Universidad Nacional de La Plata (UNLP), Universidad Nacional de Córdoba (UNC), Universidad Católica Argentina (UCA), Universidad de la República (UdelaR), Universidad de Chile (UChile), Universidad de Concepción (UdeC), Pontificia Universidad Católica de Chile (UC), Universidade da São Paulo (USP) and El Colegio de México (COLMEX).

6. To develop models for macro and micro analysis and comparative methodologies that focus on dynamic and longitudinal perspectives. A mixed-method approach is adopted utilising various quantitative and qualitative data sources.
7. To draw practical conclusions that help to inform the design of innovative public policies aimed at tackling situations of social inequality, particularly with regards to employment and education policies.
8. To establish the conceptual and methodological basis for the development of an international comparative research framework and accompanying network alongside the implementation of the research project.
9. Design an international Master programme that analyses social inequalities from a comparative perspective.

With these goals in mind, our purpose is to understand and analyse social, economic and political inclusion, as well as social models and labour market dynamics in order to analyse situations of poverty and marginalisation, and promote equality, solidarity and inter-cultural dynamics by supporting cutting-edge science, interdisciplinary research, the development of indicators and methodological advances. Our research has a leading role to play in this context and shall support the implementation of the Europe 2020 strategy as well as other relevant EU social policies, offering suggestions to design, reorient and assess the impact and effectiveness of social policy in favour of social inclusion.

This text is the project's first publication and gathers part of the work done in the different lines of research, whose common denominator is comparative analysis between European and Latin American countries, particularly in relation to the ten INCASI countries. These are partial research papers that deal with different topics related to the comparative study of social inequalities, each addressing an area of social reality (work, education, gender, migration, etc.) from a specific theoretical perspective resulting from the traditions of each research group, but presented in a new way that contrasts these social phenomena by comparing European and Latin American countries. These contributions from diverse perspectives also form part of the creation of a common analytical framework, a conceptual map that globally guides the general model for the analysis of social inequalities that we present in this introductory chapter. We have created a general framework called the Analytical Model of Social Inequalities and Trajectories (AMOSIT) in order to establish the main theoretical and conceptual approaches used to structure the network's research and the book.

The INCASI research project aims to give rise to elements of reflection, social innovation and recommendations for social policies from a comparative perspective. To this end, the project established 11 thematic axes: inequalities in the labour market and labour trajectories; asymmetries in the relationship between training and employment; inequalities in work and family life; educational inequalities; geographical and social inequalities: ethnicity and language; social inequalities, migration and space; uncertainty, strategies, resources and capabilities; inequality of opportunity: intergenerational social mobility; social policies; gender inequalities; and research methodology. The substantive core of these thematic axes forms the

main structure of this publication, divided into 15 chapters and 6 parts and based on the collaborative work carried out by the main researchers in the research project groups.

The book is thus the starting point for a journey towards a longer-term research programme, offering a variety of contributions that have been generated as result of the exchanges that the network has engendered. It is an initial effort to coordinate, unify and expose the cross-cutting aspects of the contributions based on the analysis of social inequalities. Following on from this experience, we formulate an initial and explicit theoretical-methodological framework as an integrated and dynamic comparative perspective based on international literature.

1.3 The AMOSIT Model for the Comparative Analysis of Social Inequalities Between Europe and Latin America

1.3.1 Social Inequalities from a Comparative Perspective

During the second half of the twentieth century, the European social landscape was characterised by fundamental social, political and economic changes which led to high levels of socio-economic welfare provision and social cohesion. This landscape has more recently been transformed as a result of the 2008–2015 European economic crisis, which has led to the emergence of a range of social and economic problems. These have resulted in more unequal social realities that have tended to persist among Europe's increasingly globalised and open market economies. The crisis has in turn contributed to the appearance of new forms of social organisation that are responding to volatile and less predictable social and economic contexts, within which people tend to adopt strategies to cope with these less stable and predictable times compared with those of their more secure pasts. The presence of the state's safety net is currently less prevalent and is constantly under political scrutiny in ways that have not been witnessed before. Understanding these strategies and their outcomes requires new analytical and methodological approaches that can capture their nature and scope as well as their overall capacity to respond to the new environment. Many authors refer to this situation as one of uncertainty and precariousness, and this necessarily raises questions about the vulnerability that certain groups currently face along with growing social inequalities more generally in contemporary European society.

In contrast, some Latin American countries that have been historically characterised by long-term economic instability and decline have begun to implement more inclusive and proactive public policies. These are based on the allocation of citizenship rights and the provision of resources to different social actors that were previously ignored by the state as a subject of public policy. In particular, this has occurred in the first 15 years of the twenty-first century following a period that was dominated by the hegemony of neoliberal ideas (1980–1990s) in most countries in

the region. The new wave of entitlements for many people in Latin America, in a period where the crisis has not affected the region as in Europe, includes support for chronically unemployed people, pensioners (with no history of social contributions), housewives, the chronically ill, children (e.g. whose parents do not have a stable and formal income) and the like. Such policies have sought to overcome structurally embedded social inequalities that have long been ignored and that from our perspective have positively influenced the development of the region as a whole. Nevertheless, in recent years this process has been reversed and has curtailed the possibilities for generating a social model with consolidated social policies to face historical and structural inequalities. It is also important to recognise that the recurring periods of crisis and uncertainty in Latin America have endowed its people with certain survival mechanisms that have allowed them to get by in such adverse contexts. The study of these social mechanisms presents the opportunity to draw conclusions of interest to research.

Recognition and understanding of the new social models that are being developed in the global world, particularly in Western Europe and Latin America, is regarded as a very important issue for academics and policy makers because of their potential impacts on the general population. We are encouraged to think in a new framework for comparative analysis through which these new social models can be understood and examined, without forgetting the need to understand the specificities and common elements of social behaviour that are observable among individuals and groups. This analysis should be sensitive to different national contexts and the different Welfare States in which they are embedded as well as the socio-economic background and cultural context in which people live. Attention should also be given to the different social resources and strategies for action that individuals and groups deploy throughout their working life cycles.

Hence it is necessary to consider the complexity of the issues concerning the structural and relational conditions of social inequality, which can only be captured and compared through multidimensional and interdisciplinary approaches like the one portrayed below.

The concept of social inequality is central in the Social Sciences, is present among the concerns of different national and international institutions and is one of the most used concepts in political and social life. Together with its counterpart, equality, and often accompanied by social cohesion, inequality plays a leading role in much of the academic and political-scientific discourses of a structural and universal phenomenon. From a scientific and sociological point of view, social inequality refers to a complex, multidimensional concept. As has been long argued in Sociology, the differences do not imply inequalities, and these are structured on certain differences, which per se are neither good nor bad, but which can become institutionalised by forming a state of things that consolidates, remains and is reproduced in the social structure, which can also be questioned or modified at some time, forming a new situation that represents a lesser (or greater) degree of inequality than the previous one. Thus, we understand social inequalities to be the expression of certain observable social differences in terms of hierarchical positions according to the values established in a society. They involve unequal distributions

of access to resources (economic, educational and cultural, relational, health, etc.), opportunities, prestige or power, through mechanisms that depend on certain social traits (class, gender, race, ethnicity, age, etc.), establishing the basis of institutionalised social stratification systems. In this sense, Lenski (1966) asserts that the essence of stratification is the study of the distribution in society of goods, services, position and power; and Kerbo (2012) views inequality as the condition by which people have unequal access to the resources, services and positions that society values.

But inequality is not only the expression of circumscribed logics within the nation-state. Today, in globalised and highly interrelated societies, the dynamics of the world system and the international division of labour are creating relations of dependency and domination in a competitive capitalist environment, generating divisions of world stratification between the centre and the periphery (and semiperiphery, Snyder and Kick 1979; Arrighi 1985), fuelled in particular by the action of large multinational companies with the complicity of governments and certain international organisations (Stiglitz 2012).

The conceptualisation of inequalities from this perspective is very present in Latin American scientific production, with its strong tradition of linking social inequality, which is so focused on economic aspects, to two elements, one national and one transnational: first, the logic of social reproduction to maintain power relations, and second, the legacy of colonial domination, or in more advanced times the peripheral or dependent structure of the new nations with respect to the centre of industrial development. As Kerbo (2012) emphasises, this is explained by the class and power structure that differentiates in an extreme way a small group of dominant elites from a working class that lacks power, together with the dynamics of the political system. Sidicaro (1989) highlights, in particular, the reproductive function of education systems as a key factor to ensure social structure, legitimising inequalities by ensuring that the less socially favoured perceive their situation as individual disabilities and not as the result of exploitation mechanisms and social marginalisation. With regard to the supranational issue, Gordillo (2013: 28) states that levels of inequality originate from the exclusionary institutions that have been perpetuated since colonial times and have survived the different political and economic regimes, from interventionist strategies and import substitution to more market-oriented policies. For his part, Prebisch (1949), from CLACSO, has theorised that Latin America came to take, as part of the periphery of the world economic system, the specific role of producing food and raw materials for large industrial centres, leading him to consider that capitalist development has not only been unequal from the beginning, but also contains an inherent inequality that will keep the two extremes apart (the developed countries of the centre, and the developing or underdeveloped countries of the periphery). However, this dynamic has not prevented a rapid late industrialisation process, where it is possible to distinguish between “early late” and “late late” industrialised countries (Ishida and Miwa 2011) while the phenomenon known as “backwardness” can also occur during this process (Gerschenkron 1962).

On the other hand, social inequality can be linked from a normative point of view to social justice, with the implications that it entails for people’s freedom. Sen

(1995) expressed this in terms of people's freedom to make decisions in life and to have opportunities. Noguera (2004) highlights the link between inequality and theories of justice and this necessarily leads him to relate it to the concept of real freedom, in the sense of Van Parijs (1995). The author concludes that inequalities are constituted by those assignments of deontic powers that grant things that increase or decrease "real freedom".

Rawls (1971), keeping in mind the idea of the social contract, proposed his theory of social justice understood as equity and distributive justice that involves improved distribution of goods and responsibilities to meet the needs of the greatest number of people. In order to choose the rules that govern a society, Rawls proposes reliable tie-breaking mechanisms between any two societies, whereby the most just can be selected, using the resource that Rawls calls the "veil of ignorance", that is, ignorance of the place that the person will occupy in the final social stratification. For Rawls it is rational for each individual to be conservative when choosing, and to do so in accordance with the "maximin" principle (the maximum of the minimum available), that is, to choose the one that produces the greatest benefit against the worst possible outcome.

But the reference to the individual cannot forget the dimension of the social and institutional context or the effects that inequality has for the integration of the individual in society and the recognition of citizenship (Polanyi 1944; Anderson 2015). Thus, the rich literature on social inequalities identifies different types of definitions positioned from macrosociological perspectives (on different levels, not only structuralist in national terms) to positions with greater emphasis on the individual. There are also some perspectives that take both dimensions into account. The latter is used to a greater extent by European and contemporary authors and the more structuralist perspectives are more commonly employed by Latin American authors and some classical sociologists. It is important to note that all of these are part of the nucleus of the theoretical corpus of social stratification, which, as Rosalía Martínez says, is where sociologists study social inequality, that is, the unequal distribution of goods and services, rights and obligations, and not from individual attributes (Martínez 1999: 24).

In short, we could say that wealth (capital, rent, income, property, etc.), life opportunities, access to goods and services, risks, power, technology and, in general terms and to quote Rosemary Crompton (1994: 173) "unequal distribution of material and symbolic rewards" not only influence, determine and, consequently, structure the position in a social system, but also affect individual freedom or rather liberal freedom (Pettit 1996), a concept that refers to negative freedom, which involves two distinctive elements: independent actions or activities, which do not directly involve others; and the need to be provided with a non-interference area that guarantees the performance of said activities.

To conclude this section, we should highlight that our analysis of the different dimensions of social inequality from a comparative perspective repeatedly verifies the unequal positions between the different Latin American and European countries. Using multiple indicators in different areas (economic, labour, institutional, educational, health, demographic, etc.), with their nuances, a scaled stratification

expresses the contrasts between the less developed, poorer and more unequal countries of Latin America (such as the Central American and Caribbean countries) with the most developed, richest and least unequal countries in central and northern Europe (such as Germany and the Scandinavian countries). In intermediate positions are the most advanced Latin American countries (such as Chile, Argentina and Uruguay), behind, but close to, the countries of Eastern Europe (such as Russia and Lithuania) and the south (such as Spain and Italy). There is no doubt that the different ways in which inequality is expressed are and have historically been more important in the Latin American continent than in the European social reality. In general, inequality, whether expressed in relative terms (such as distance) or in absolute terms (such as magnitude) and the achievement of socially valued goods and services is lower in Latin American countries. In any case, both poverty and inequality are two dimensions that erode societies, lead to social conflict and constitute an obstacle to achieving higher levels of well-being and sustainable economic development from the point of view of social justice and the foundations of democracy (Piketty 2014), thus representing a threat to the social system (Stiglitz 2012).

To illustrate the stratification between countries in a simple and summarised manner, we descriptively analyse the relationship between a classic measure of economic inequality, the Gini index, which measures the deviation of income distribution among individuals or households in a given country with respect to a distribution of perfect equality (the value 0), and such a widely accepted measure of the level of development of countries as the United Nations Human Development Index, which measures achievements in three key dimensions of human development: a long and healthy life, access to knowledge and a decent life, and a decent standard of living (UNDP 2019). Taking 58 European and Latin American countries, the relationship between both variables is represented in the scatter plot shown in Fig. 1.1, in which countries have been grouped into four categories in both variables according to a division into quartiles that delimit the low, medium-low, medium-high and high levels.

The general tendency for the level of inequality to decrease as a country's level of development increases can be seen in the graph, as shown in particular by the regression line. However, for each level of development it is also possible to observe certain dispersion in the level of inequality that reveals nuances in this trend, with situations, for example, of a certain level of development and high levels of inequality, in the case of Chile, or low level of development and low inequality, as in Ukraine. Even so, the relationship is clearly inverse, placing the countries of central and northern Europe at the lower extreme of high development and low inequality, compared to the higher extreme of low development and high inequality that is more characteristic of Central American countries. Intermediate positions scale that trend in an interpolated manner. The member countries of the INCASI project are highlighted in the chart, and represent the aforesaid trend: Brazil, Mexico and Chile with higher levels of inequality, the former two with the lowest level of development; Argentina and Uruguay as Latin American examples of greater development and less inequality; Spain and Italy representing the model of Southern Europe with a certain level of development and greater inequality; and, finally, the United

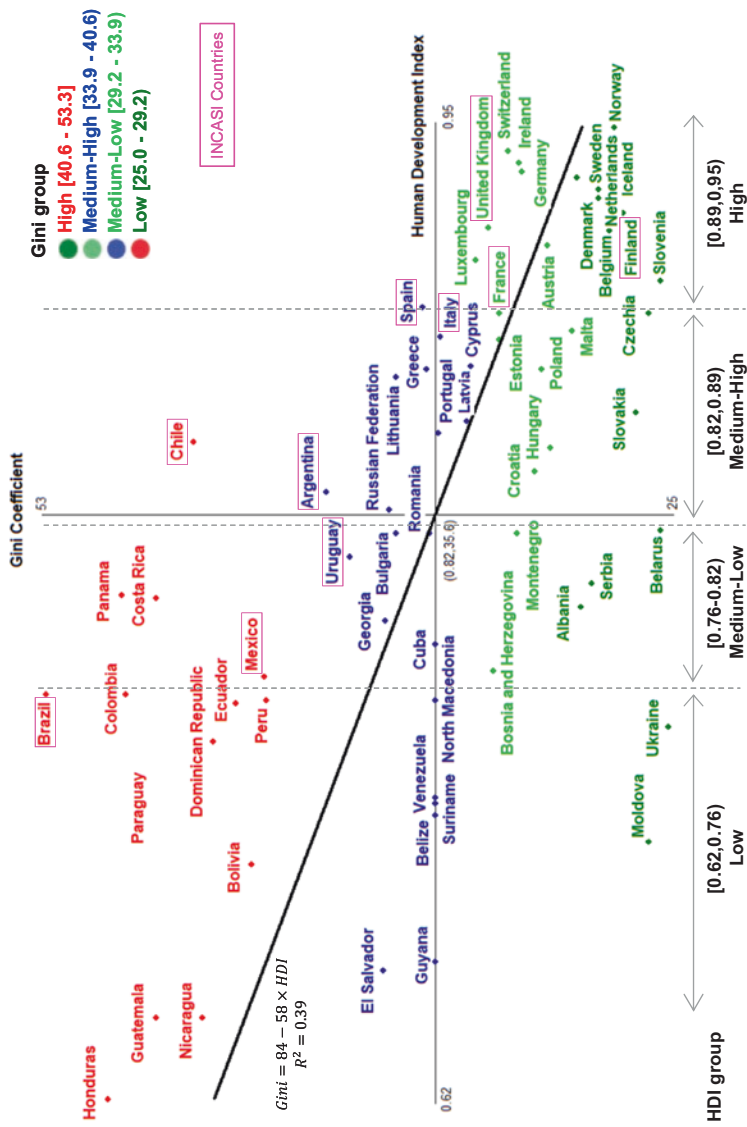


Fig. 1.1 Relationship between inequality and development in Europe and Latin America. Source: Authors, based on Human Development Report 2019, UNDP

Kingdom, France and Finland, with the highest values in development and the lowest in inequality. These different behaviours can be interpreted in light of the different social models whose characteristics we will be presenting throughout this book.

Despite the static appearance of the inequality indicators, we should not, however, forget trends over time. Viewed historically and considering the advent of industrial and post-industrial societies, it is concluded that this long period has led to a reduction in inequalities and increases in living standards (Kerbo 2012). The Human Development Report 2019 of the United Nations Development Program also highlights among its conclusions that “looking back over almost three decades, all regions and human development groups have made substantial progress”. Viewed across a limited time-span, since the 1970s, which has seen the extension of the neoliberal model, this trend is different in terms of inequality indicators (Piketty 2014), especially if we take into account the closest time period, following the so-called Great European Recession from 2008 onwards regressive and austerity levels have been reached that have raised the levels of inequality in the countries of Europe. It has not been the case of the trend in the same period for Latin America, which has experienced levels of growth and attenuation of inequalities, so, modestly, the distances between Latin America and Europe have approximated. Figure 1.2 illustrates this idea for the INCASI countries. We can see the general trend in Latin American countries towards a reduction in economic inequality, while European countries have experienced various fluctuations, with a slight worsening of inequality in the 2008–2015 period.

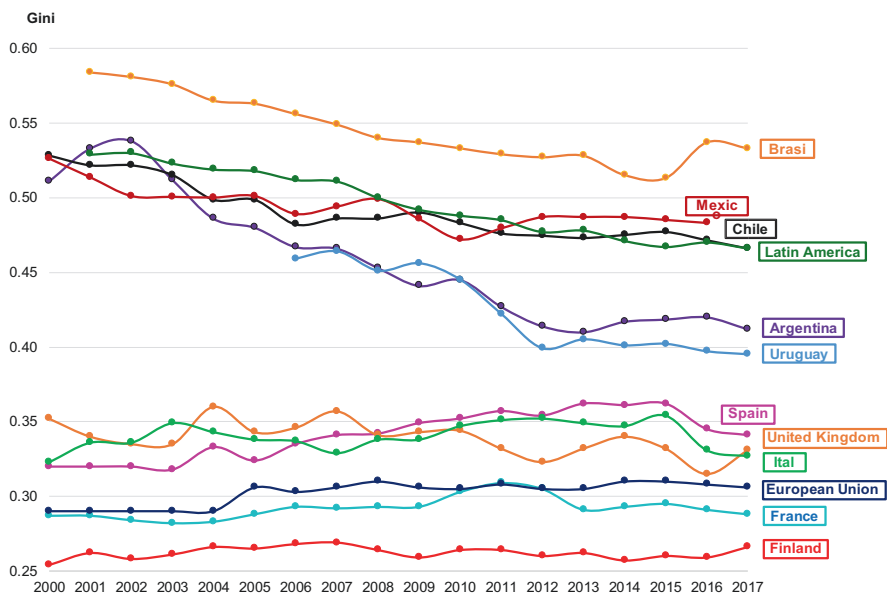


Fig. 1.2 Evolution of economic inequality in Europe and Latin America 2000–2017. Source: Authors, based on World Bank, OECD & Eurostat

But in all cases the inequalities persist, they are expressed more or less radically and intensely, revealing common general social dynamics that we will try to illustrate in our investigations.

1.3.2 Analytical Model on Social Inequalities and Trajectories (AMOSIT)

The different research traditions and theoretical perspectives in the research of social inequalities of the INCASI network have been framed in a general scheme that has served as an analytical framework in which to place the contributions and partial research advances made during the project. We have called this general framework AMOSIT: Analytical Model on Social Inequalities and Trajectories.

In the AMOSIT model we establish, from the substantive point of view, three central areas of social life where we can study social inequalities in an interrelated manner: the education system, productive work and reproductive work. From the methodological point of view, we define three central aspects: the combination of macrosocial and microsocial elements with mixed method analysis designs, the relevance of the dynamic dimension of social phenomena over time and the comparative perspective between countries.

This is not a closed analysis model. Rather, it is a starting point for the different lines of research developed in the network as a whole. Nor is it a single, general theoretical model for the study of social inequalities from a comparative perspective. It contains different theoretical perspectives that address different theoretical-conceptual aspects as presented graphically in Fig. 1.3. Thus, the chapters of the book are the expression of this feature that shares the relevance of integrating the different elements presented in the model.

Research carried out by each of the groups participating in this network and the general literature on the subject are abundant, diverse and of long-standing tradition. We will gather some of the major contributions that summarise part of the history and state of the art in relation to the study's objectives. This background has been divided into seven thematic lines of research in order to have a common starting point for undertaking exchange and developing the AMOSIT model.

1.3.2.1 Inequalities in the Labour Market and Labour Trajectories

The concept of flexibility is paramount in order to understand the new employment models that have emerged since the eighties (Atkinson 1984; Castel 1995; Castells 1997; Miguélez and Prieto 2009; Banyuls et al. 2009). Companies seeking to adapt their strategies to the requirements of the overall demand have to search constantly for the most recent technological applications, review their organisational structures and adjust the cost of their activities in view of improving their competitiveness. In

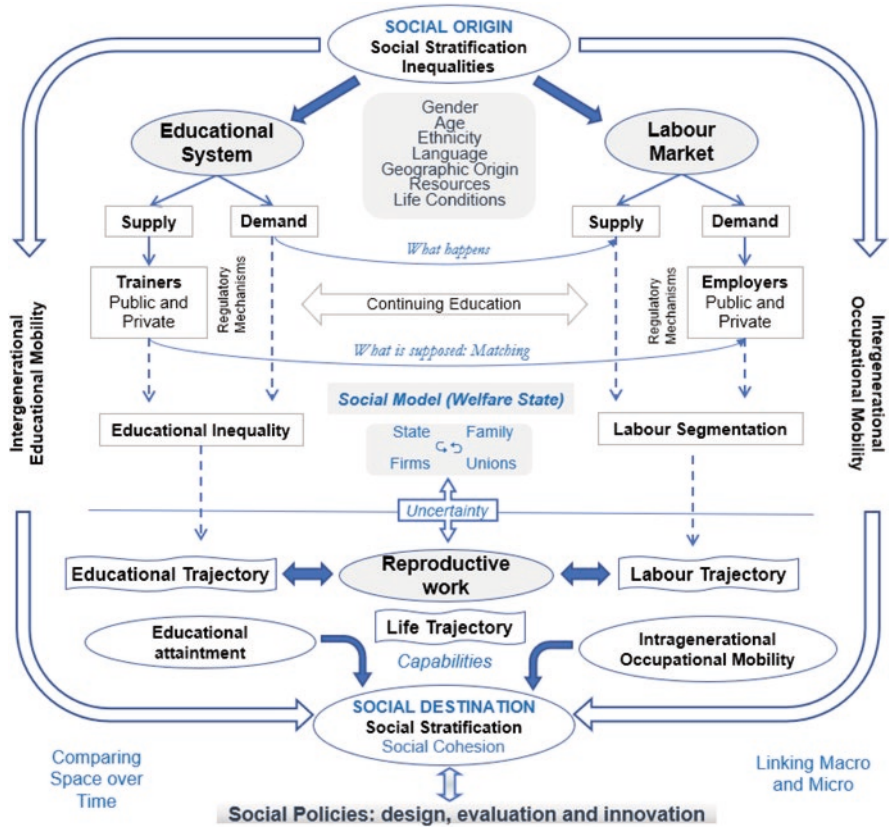


Fig. 1.3 Analytical model on social inequalities and trajectories (AMOSIT)

consequence, they are also forced to examine the quantity and quality of the workforce employed. The theoretical perspective of labour market segmentation (Grimshaw et al. 2017) helps us understand these processes and interrelate them with institutional contexts and reproductive work.

The main expression of such dynamics is the precariousness and temporality of labour contracts (Toharia 2005; Molina and López-Roldán 2015). In these circumstances: (1) new requirements and training profiles are expected in terms of competencies: adaptability and autonomy, and other soft skills become essential (Planas 2013); (2) consequently, according to new sources of information on different types of professional itineraries (Toharia and Cebrián 2007; QUIT 2011), segmentation, individualisation and diversification of the workforce will break traditional biographical trajectories (López-Roldán et al. 1998; Alòs 2008) and (3) future employment opportunities are becoming more and more uncertain thus resulting in increased vulnerability (Germe 2011).

A crucial aspect in the configuration of inequalities, particularly in the workplace, is linked to technology and qualifications. The consequences derived from

technological progress, with the digital revolution and robotisation, are creating uncertain scenarios and becoming a factor that generates potential inequalities depending on how they are implemented and the abilities of individuals to adapt to that environment (Miguélez 2019).

On the other hand, in the specific context of Latin America, one current issue is of utmost importance and topicality: why, in a context characterised by extraordinary mobilisation and concentration, have Latin American countries not achieved effective convergence in terms of equality in recent decades? It seems that the heterogeneity of the productive systems and labour markets in capitalist economies, subordinated to the global economy, constitute an obstacle for the promotion of new political and economic models. The theoretical perspective of Structural Heterogeneity will serve as an explanatory model of the Latin American dynamics in the processes of accumulation and segmentation of the labour market (Prebisch 1949; Donza et al. 2019). The predominant economic model based on an unequal financial regime controls the accumulation and distribution of social resources (Salvia et al. 2010). In this sense, the process of international economic liberalisation, the concentration of multinational capital and globalised financial expansion seem to have intensified a subordinate model of structural heterogeneity. Hence the persistence of social marginality based on substantial and growing labour productivity differentials and a bulky micro-informal sector with feeble productivity and low income level (Chávez-Molina and Sacco 2015). Special attention should be paid to labour informality in Latin America. Many analysts have pointed out that its causes are deeply rooted in profound socio-structural components (Salvia et al. 2012; Persia et al. 2011; Manzo 2014; Neffa 2016), hence the need to differentiate between “macro” and “micro” labour formalisation strategies. The former notion refers to macro-economic policies that encourage the demand for formal employment while the latter is specifically designed to counter labour informality (Bertranou et al. 2011; Manzo 2014).

Finally, closely linked to the labour market and relating the institutional framework of industrial relations with the model of Welfare State (Esping-Andersen 1990), we formulate the concept of Social Model, in which context it is possible to analyse the methods for dealing with social inequalities and correcting them through pre-distributive (foresight) and post-distributive (palliative) policies, a concept inspired by that of varieties of capitalism based on the comparison of social institutions (Menz 2008; Burrioni 2016).

1.3.2.2 Educational Inequalities

Educational inequalities, especially in terms of opportunities due to social origin, have been one of the central themes of the sociology of education. The existence of an empirical relationship between the economic and cultural resources of parents and academic achievement of children was analysed by the classic Coleman report (Coleman et al. 1966) and has been updated in recent years by the well-known PISA reports. According to Boudon (1983), there are two types of inequalities or effects:

primary and secondary. The former are those that directly affect the impact of family attitudes to socialisation and children's aptitudes in relation to school requirements, or indirectly through mechanisms such as school choice or resource mobilisation. Secondary effects are those that concern educational choices, which have increased their range of action through growing enrolment rates and diversified post-compulsory educational pathways. For this reason, the concept of pathway has been developed (Raffe 2003, 2011; Casal et al. 2006) to analyse the effect of structural constraints and the role of the choices of different social actors. We can find pathways that end up reproducing the social positions of parents, but also diverse mobility pathways depending on educational opportunities and success (Dalle et al. 2019).

Inequalities in educational outcomes are considered to be an indicator of the lack of efficient education systems. Although much attention has been paid to schools and teacher training and huge investments have been made through education policies, only a few researchers have focused on the role played by families (Martínez García and Molina Derteano 2019; Solís 2019). There needs to be stronger strategic agreement between the two stakeholders in education (school and family) as that is the key to effective teaching and the achievement of better quality education. It is also important to assess the impact of economic crisis on the unequal education opportunities and the drop-out of children from poor families.

The role of socially vulnerable families, the deficit of their cultural capital as a factor of exclusion and the strategies for linking family and schools in order to improve educational outcomes also need to be analysed (Hoover-Dempsey et al. 2005; Hill and Craft 2003; Romagnoli and Gallardo 2010).

1.3.2.3 Asymmetries in the Relationship Between Training and Employment

Many analysts, especially those who are linked to European rating agencies, are in favour of legal adjustments between training and work. Assuming this to be an optimal situation, they seek to test this hypothesis (Bonnal et al. 2005; Bruyère and Lemistre 2005; Giret and Moullet 2005; Oliver et al. 2001) or isolate the factors that impede its implementation (Groot and Maassen van den Brink 2000; Hartog 2000; Cart and Toutin 2005). However, it has been shown that such matching between training and employment occurs in very small proportions.

Several researchers find that there is a relative autonomy of the demand for education with respect to economic output (Carnoy and Levin 1985; QUIT 2000; Bédoué and Planas 2003; Mercado and Planas 2005). We are witnessing a process of diversification of educational paths and diversification of employment as noted above. Professional aptitudes are viewed as more than initial formal training and particular stress is put on the role of learning based on work experience (Bédoué and Espinasse 1996). This calls into question the concept of the labour market based on a mechanical correspondence between training specialties and occupation (Planas 2013, 2014). The socio-educational changes in the current global context of

development include increased training of university professionals, located at the apex of the social pyramid but where underemployment is rising every day (López-Roldán and Fachelli 2019).

However, these processes do not take place evenly and equitably, and involve various factors including: the accumulating conditions imposed by markets; governmental policies in the areas of economy, social welfare and education; the inclusion of university communities and professional groups; different family strategies depending on social classes, and the “life strategies” of young academics as active agents within this socio-historical setting. Thus, the relationship between vocational training and work experience is central to the ways that a social system is reproduced and a strategic factor of economic development (Baudelot and Leclercq 2008; OECD 2008, 2009; Rubilar et al. 2019).

1.3.2.4 Inequalities in Work and Family Life

Everyday social life comprises various areas where leisure time is interrelated with productive and reproductive activities and periods. This perspective leads to the consideration of work in a broader sense, beyond employment, taking into account the sexual division of labour and the implications of the relationship between family, market and state (QUIT 1998; Crompton 2006; Torns et al. 2011; Carrasco et al. 2011). The lifetime or life cycle perspective (Elder Jr. 1985; Mortimer and Shanahan 2003; Muñoz-Terra 2012) has provided relevant analyses of the sequence of events and experiences during a lifetime (Runyan 1982) and has integrated the interaction of various areas of daily life into a whole: family, education and employment, giving meaning to life projects and identifying concepts like trajectory, transition and turning point, and from a multidimensional approach, types of life stages when individuals combine the different uses of time (Anxo et al. 2007, 2010; Klammer et al. 2008; Casal et al. 2006).

It is essential to relate the activities and times of life in order to understand the inequalities in the labour market, the sexual division of labour and social positions and recognitions from the point of view of gender, and to understand the labour discrimination of women (Bettio and Verashchagina 2009). The theoretical contributions of feminist socioeconomics constitute a central reference for understanding and avoiding androcentric views. They will serve to explain the different career paths of men and women (Torns et al. 2013; Muñoz-Terra 2020) or the different impact of the crisis according to gender (Rubery 2014; González Gago and Segales Kirzner 2014; Kushi and McManus 2018; Sánchez-Mira and O'Reilly 2018).

The gender perspective is a transversal pillar of the project and our analysis model, under the belief that the analysis and innovative proposals must emphasize the differentiated social position of men and women. One of the network's clear goals is to advance the development of an analytical framework that places social reproduction at the centre of the socio-economical system, displacing commodity production from the central position established by traditional economic perspectives. In this way, family and domestic work emerges as a relevant element,

fundamental in people's reproduction and welfare. More specifically, to analyse inequalities between women and men in their labour participation, in how work is distributed within the households to meet the needs of reproduction, care and welfare, and in time conflicts in terms of time dedicated to these tasks, thus providing a much more realistic perspective of social organisation and functioning.

These approaches enable a clearer definition of the dominant labour model, and elucidate the main obstacles faced by female employment, the social positions reached by women and ultimately their social role, including an analysis of the total time spent on different jobs from the perspective of livelihood strategies and household reproduction. Under these considerations the analysis of working times, flexibilities and conciliations will explain the management and organisation of work and life and we also study changes in the organisation of production (new forms of flexibility tailored to the needs of enterprises) and changes within the family and human care needs (Adam 2004; Agarwal 1997; Carrasco and Domínguez 2011; Domínguez et al. 2019).

In conclusion, the network aims to advance the production and theoretical discussion of new perspectives that go beyond women being added to and considered under traditional paradigms, and that can offer new perspectives of analysis to consider the different jobs performed in our societies (Carrasco and Domínguez 2003; Carrasco et al. 2004).

1.3.2.5 Social Inequalities, Migration and Space

According to classical migration theories, the relationship between migration and social inequality is closely related to immigrants' employability in the labour market. This in many cases comprises low-skilled, unstable, precarious and unprotected jobs—for example those in the black or informal market (Piore 1983). Seminal work by Castles and Kosack (1975) rightly analysed this phenomenon within the framework of capital accumulation processes and growing inequality between 'the centre' and 'the periphery'—a phenomenon inherent to the global capitalist system (Castles and Kosack 1975).

The social inequality generated by national migration policies must be added to the social inequality equation insofar as "(...) is precisely the control which states exercise over borders that defines international migration as a distinctive social process" (Zolberg 1989: 405). The process of incorporating immigrants into the host society brings in turn other situations of social exclusion, for example due to racist and xenophobic attitudes among the local population toward the new arrivals, a process that not only relates to the social class origin of migrants, but also their ethnicity and race as mechanisms of "social integration" (Blanco 2000) or indeed 'social exclusion'.

However, more recent approaches go beyond the analysis of the relationship between migration and social inequality solely from the point of view of the host country by adopting a transnational perspective, whereby the contexts of origin and destination of migration flows are connected through relationships that the migrants

themselves build and maintain over geographical, political and cultural boundaries (Glick Schiller et al. 1992; Levitt 2001; Vertovec 2004; Oso and Suárez-Grimalt 2018). In this sense, the study of migrants' social mobility must be understood in the context of family strategies and personal migratory trajectories that cover various social spaces such as country of origin, transnational destination, diaspora and space (Oso 2011; Oso et al. 2019). Social-spatial inequalities are also being analysed from the perspective of a more comprehensive so-called paradigm of mobility (Urry 2007) and from the perspective of urban seclusion basically based on urban spatial inequality and the ethno-racial domination (Wacquant 2001, 2007a, b).

In Latin America, migratory flows have in recent decades continuously modified the social structures of both countries of origin and destination. Different types of migrants and migration scenarios can be observed: (1) regular or irregular migrants who can return to their countries; (2) people who are forced to emigrate as refugees or displaced citizens, and (3) all of them deploying different socio-economic characteristics, levels of qualification and trajectories in the labour market. Independently from these elements, patterns of inequality and discrimination tend to reproduce in the countries of destination (Texidó and Gurrieri 2012; Stefoni 2017).

Segregation is particularly made visible in Latin American cities through informal labour markets and through the location of housing in high-risk and spatially segregated zones (Boniole and Estévez-Leston 2017). Poor physical infrastructure and property insecurity are often worsened due to settlement and housing policies favouring building projects in the urban periphery where the land is cheap and far from the many opportunities within the inner cities. In recent years, gated communities built in the poor outskirts of cities have changed the patterns of urban segregation. Today, it is possible to find concentrated high-income zones, other segregated low-income areas and mixed districts in areas where there are also low-income homes and gated communities (Sassen 1999; Fachelli et al. 2015).

All these developments are shaping a different social geography of inequalities which poses new problems, new challenges but also some opportunities for the poor and socially excluded. While wealthy gated communities, located in the midst of poor suburban areas, create working opportunities and attract business and services to the area, at the same time they represent an expression of symbolic violence not only as a result of their guarded entrances and perimeter fences and walls but also by the abundance of resources that they have and that everybody around lacks (Wacquant 2015).

1.3.2.6 Uncertainty, Strategies, Resources and Capabilities

From the perspective of the individuals themselves, it is important to take into account the multiplicity of personal and social resources that individuals can deploy to improve their employability within increasingly uncertain and unpredictable social and economic contexts. In this sense, the capability approach (Sen 1992, 1993) has proved fruitful for understanding the processes and opportunities at stake when people are being chosen for different jobs and when they mobilise their

resources in order to achieve a practical and effective result. All of this has to be combined with a life-cycle strategy (Runyan 1982), which is where the true agency development takes place, that is, in contexts of structurally unequal social relations (Verd et al. 2009). This enables us to explain the vital, professional and formative positions and trajectories in a new context of increasing unpredictability (Bauman 2007; Beck 1998, 2000; Lash et al. 1996; Vacchiano 2016).

Schmid's theory of transitional employment options, which integrates both the individual and the institutional perspectives, is very useful. The individual perspective takes as its starting point the work by Beck (1998, 2000) and Giddens (1994a, b), which describes a society characterised by risk and uncertainty. Rather than being predetermined paths towards a neat and orderly professional career, labour markets require frequent adjustments due to external influences (e.g. changing markets, technologies, company restructuration processes, demographic cycles, etc.) and workers' personal changes and preferences (e.g. family changes, individual reorientations, diseases, etc.). Frequent exits from and re-entries to the labour market are indeed a significant phenomenon in modern employment and their effects mark all aspects of individual life trajectories (Rogowski and Schmid 1997; Schmid 1998). In the past, the domestic or family economy provided individuals with an institutional framework for transitions between jobs in the formal labour market. Nowadays, these transition processes require a new institutional framework in order to avoid high unemployment costs and persistent instability and vulnerability of life and work pathways.

Meanwhile, the development of technologies favours the progress and development of society, but also represents specific risks in everyday life: such constant innovation makes life trajectories more uncertain. If possible, we therefore need to counteract the effects of technology, or learn how best to live with it (Miguélez 2019).

1.3.2.7 Inequality of Opportunity: Intergenerational Social Mobility

The central themes for analysis are the changes occurring in recent times in terms of social stratification, intergenerational mobility and social welfare. The causal relationship between better social welfare conditions, equality and better work and life opportunities is well established in the literature; hence occupational categories assume a theoretical and methodological role that can model the processes of social inequality. In this sense, scientific analysis should focus its attention on how households and the workforce are embedded in social relations of class, and how they use resources and market opportunities and participate in the distribution of income and social resources in order to actively impact the processes of social mobility.

From the seminal works by Lipset and Zetterberg (1959); Featherman et al. (1975); Grusky and Hauser (1984); through to the general review by Erikson and Golthorpe (1993), international analyses of social mobility have traditionally concluded that the possibility of mobility is invariable when absolute mobility is controlled. However, recent research using new data and up to date methods and including segments of the population that have previously been overlooked such as

females, are challenging traditional assumptions (Breen and Müller 2020; Gil Hernández et al. 2017; Fachelli and López Roldán 2013, 2015; Breen et al. 2009; Salido 2001).

In Latin America, social mobility is presented as a counterpart to the study of development and socioeconomic inequality (Germani 1968; Costa Pinto 1965; Filgueira and Geneletti 1981; Filgueira 2007). Moreover, the constant inequality observed by Erikson and Golthorpe (1993) challenges both economic and social policies. Recent studies highlight the need for more socially fluid models that can slowly alleviate underlying inequality by means of redistribution policies that seek to overcome the typical barriers found when analysing the traditional inequality and mobility model (Solís and Boado 2016).

On the other hand, the analysts express concern about the discrepancies in the results of the relationship between inequality and social fluidity between sociological and economic approaches to intergenerational mobility. Torche (2020) makes critical revisions of this relationship, which includes professional, class, salary and income mobility. The analysis by Hertel and Groj-Samberg (2019) finds a negative correlation between inter-class inequality and social fluidity, with between-class inequality being a better predictor of mobility chances than conventional distributional measures. Others are highly concerned about re-examining mobility from a class perspective in order to overcome the reductionist attempts to match income mobility, and in that sense address the complexity of the relationship between inequality and social mobility (Bukodi and Goldthorpe 2018).

Finally, other studies examine the relationship between education and intergenerational social mobility, using new and innovative methodological approaches based on simulations that analyse different scenarios to corroborate the positive effect of expansion and educational equality on social mobility trends over time (Breen 2020; Fachelli et al. 2020; Salido and Fachelli 2020; Vallet 2020).

1.3.2.8 Linking the Thematic Lines of Research

The thematic lines that guide this project form a general model that was conceived to facilitate comparative global analysis of social inequalities between Europe and Latin America. The model, shown in Fig. 1.3, attempts to establish a general framework in order to obtain innovative ways of conceptualising and analysing social inequalities by placing life, labour and educational trajectories, and strategies associated with these trajectories, at the centre of the analysis. Considering different social, political, economic and cultural contexts, we aim to extract and compare elements that contribute to the development of innovative theoretical reflexions and methodologies, as well as policy recommendations for fighting social inequalities and promoting social justice.

The proposed analysis model is an initial formulation that seeks to embrace the perspectives and experiences of the entire participating network. The model allows us to question the social mechanisms that come into play when facing situations of

inequality and uncertainty, patterns of behaviour and the factors that explain them while comparing different countries.

We formulate a general hypothesis that supports the idea that the hegemonic labour model, typically described by various authors as “standard” or “conventional”, i.e., based on a full-time job, with well-defined occupational tasks and a lifelong professional career, has collapsed in Latin America and is weakening rapidly in Europe. Flexibility is growing, as new situations dominated by uncertainty and informality, with casual jobs and non-standard employment, become predominant. Different patterns of labour trajectories and new social realities are shaped by strategies and life projects characterised by varying degrees of vulnerability and social insecurity, which in turn generate new dynamics of social mobility. New strategies and trajectories to face the current realities of work and life have become apparent, and we hypothesise that these changes are affecting the everyday lives of all social groups. However, depending on the availability of different resources, the effects of strategies and capabilities that facilitate or impede the management of this new reality, the role of the State and the particular social model, are expressed in the form of concrete social inequalities. Consequently, these elements enhance or weaken people’s social status.

We therefore sustain that:

1. In the current context of global uncertainty, the characteristics of social inequality have a greater component of instability. Therefore, dynamic processes of constant change and greater uncertainty equate to unstable social positions for individuals.
2. Based on this dynamic, different types of educational, labour and life trajectories can be identified that deal with uncertainty with differing outcomes, as a result of the combination of different capacities and social resources, expressed in different protective strategies.
3. These results can be explained by the confluence of macrosocial (structural), microsocial (individual action) and mesosocial factors and are identified in the interrelationship between productive and reproductive life.
4. Social class, gender and gender social models, age and life cycle, immigrant origin, level of education, ethnic and racial traits, demographic changes and spatial segregation are the main dimensions that explain patterns of social inequality.
5. Each socio-political and cultural context and each social model transmits specificities and dynamics that shape social inequalities in different ways. Depending on the institutional framework, the role of the State and its pre-distributive and post-distributive policies, a society’s level of social inequality will differ, as will the possibilities to prevent and protect it, especially in crisis contexts.
6. Despite identifying different social realities in Europe and Latin America, and also within each country, with specific explanatory mechanisms, it is possible to identify certain general patterns derived from the common nature of social inequalities in increasingly global societies.

7. As a result of the Great Recession in Europe and the reactivation of social policies in Latin America, the distances in terms of social inequalities have been reduced, albeit moderately.

The analysis model highlights the key concepts linking social starting positions to the current target positions in a stratified social structure, which expresses changes over time and is spanned by general uncertainty. This progression in time involves three focuses: the education system, the labour market and the reproductive sphere. Their dynamic linkages generate unequal positions and trajectories between people: higher or lower educational levels lead to an unequal education structure, and better or worse jobs generate a segmented and unequal labour market, and this is configured depending on reproductive work. Therefore, these areas of interest are articulated within a life cycle perspective that is interrelated with biographies and life projects framed in each socio-historical context, generating long term effects on opportunities, inequalities and intergenerational social mobility.

From a methodological point of view, we consider combining qualitative and quantitative methodologies, and developing mixed method designs for the analysis of social inequalities based on the AMOSIT model. The methodologies that can be applied to the analysis of social inequalities, trajectories and mobility are vast, rich and varied. The idea of combining usually separate research strategies in an integrative mixed-method approach makes an original contribution to the treatment of social complexity. As generic methodological guidelines we understand that (1) the study of complex systems requires investigation of the process, its generation and its dynamic, through an explicit conceptual model, (2) social phenomena are situational and are located in certain social levels and contexts; the differentiation and contrast of these different references in terms of the times, spaces, situations, contexts and social levels of the object of study is an important premise for the analysis of social complexity, and (3) consequently, the design of an appropriate methodology for investigating trajectories and mobility requires simultaneous use of quantitative tools that can facilitate the metric quantification of the phenomena, as well as others that may capture its qualitative dimension. A combination of three defining features will crosscut the methodological design, consistent with the AMOSIT analysis model and from a social complexity perspective: (1) the consideration of macro and micro-social contexts leads to a mixed design integrated with the combined use of qualitative and quantitative techniques; (2) the combination of sectional and longitudinal analysis logics; and (3) comparative analysis among and within countries.

The research has also led us to propose, together with its elements of knowledge and reflection, the development of diagnoses and proposals for public policies to guide social action and assist governments in dealing with social inequalities. For this purpose, part of the final chapter of the book identifies each of the phenomena analysed in the text and presents the observed inequalities, indicating the most relevant policies for addressing these inequalities and the institutions that should carry them out.

1.4 Structure and Contents of the Book

Each chapter generally follows the same structure, including a macro-social comparative analysis with general indicators for each subject (with the largest possible number of countries in Europe and Latin America), a proposal or theoretical-methodological reflection on the approach to each subject, and a specific comparative empirical study of two or more countries to illustrate the research being done in each area.

The book shows how, in the context of global societies, highly different social, economic and cultural realities resulting from particular historical processes and different levels of development and institutionalisation can lead to both diverging dynamics that explain the specificities of each country and region and converging dynamics that reveal common mechanisms for structuring social inequalities in a global society. The book is an original, up-to-date contribution to the comparative analysis of social inequalities between Latin American and European countries that reflects differences and similarities in terms of inequality with the ultimate goal of revealing points for reflection and diagnosis. The overall aim is to promote scientific and social innovation and to make recommendations for social policy aimed at reducing social inequalities in a variety of institutional contexts.

The contents of the book capture the network's main lines of work during the 4 years of its project and the various theoretical-methodological perspectives from which comparative research on social inequalities between countries is addressed.

The book is divided into 15 chapters based on the main lines of research conducted by the INCASI project. The contents are divided into six parts.

Part I, which includes this chapter, places the research perspective in a theoretical and methodological framework. Chapter 2 presents social models as a conceptual framework to facilitate debate and comparison between European and Latin American countries in order to synthesise the articulation of institutional aspects of work and social protection between pre-distribution and post-distribution policies expressed in the form of a typology.

Part II deals with two central axes through which social inequalities are structured, namely productive work and education, the links between the two and a reflexion focused on the challenge posed by technologies. Chapter 3 specifically analyses the labour market as a crystallisation of inequalities in terms of segmentation resulting from the dynamics of the productive structure, employer strategies, regulatory frameworks and the socioeconomic characteristics of the supply. Chapter 4 analyses educational attainment as an expression of social inequalities in terms of cultural capital and highlights its evolution in three different countries in order to present the challenges that systems are facing. The relationship between training and employment is taken up in Chap. 5, from the viewpoint of the challenging changes and demands posed by new technologies, robotization of labour, qualifications, the need for a new education system, and the consequences in terms of inequality. This analysis is complemented by an assessment of changes to everyday life.

Part III analyses stratification and social mobility. It starts in Chap. 6 with a conceptually grounded exercise to measure social class from a comparative perspective. This is followed by a presentation of two social mobility studies. The first, Chap. 7, is a classic study of social mobility structure in light of the main explanatory theories and a comparison of the Latin American and European countries in the INCASI project, presenting a relative measure of social distance between classes in comparative terms that demonstrates the barriers depending on whether they are European or Latin American countries. In the second, Chap. 8, social mobility and migration processes are related through a dual quantitative and qualitative approach that analyses changes that immigration produces in the class structures of the different countries (both in the origin and in the destination), and the strategies of the migrant population from a transnational perspective. Finally, Chap. 9 addresses income inequalities in both continents, showing the different levels of inequality and the recent reduction in its gaps.

Part IV broadens the social perspective by examining life's stages and activities from a gender perspective. In Chap. 10 social inequalities are discussed by developing a theoretical-methodological framework from the perspective of life courses, which involves multidimensional analyses over time. In this framework we study life trajectories as a combination of different spheres of social, productive and reproductive life, and especially with regard to macro, meso and microsocial levels. In Chap. 11, a non-androcentric perspective guides an analysis of the uses of time through the broad conceptualisation of work and its sexual division, with its implications for relations between family, market and state. Chapter 12 concludes this section with a study from the gender perspective of care work framed in the socio-political context and the tension created by neoliberal policies.

Part V analyses two aspects of social policies. Chapter 13 presents a comparative analysis between countries at the macro, meso and micro-levels, dealing with unemployment protection systems and their relationship with social models. Chapter 14 analyses the pension system, describing the particularities of each territory and focusing on the effects of the reforms and counter-reforms of social protection systems that have ultimately maintained the levels of inequality.

Chapter 15 ends the book with a presentation of the main conclusions, some recommendations for public policies in the different areas addressed in the book and a description of the first general lines of a future research program for the comparative analysis of social inequalities between Europe and Latin America.

We hope that the book will be of interest to specialists and people interested in the topic of social inequalities, in particular in terms of the contrasting realities of European and Latin American countries. We also hope that this text will be the starting point for a fruitful line of work that will lead us to propose an even more ambitious international collaborative research program.

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Chapter 2

Social Models for Dealing with Inequalities



Antonio Martín-Artiles, Eduardo Chávez-Molina, and Renata Semenza

Abstract This chapter compares social models in Europe and Latin America. The goal is to study the interaction between two institutions: on the one hand, pre-distributive (ex ante) institutions, such as the structure and coverage of collective bargaining and, on the other hand, post-distributive (ex post) institutions, such as unemployment protection and social policy. Pre-distributive institutions are important for correcting inequalities in the labour market, because they introduce guidelines for egalitarian wage structures. Post-distributive institutions help to mitigate inequalities generated in the labour market.

The methodology is based on statistical analysis of a series of indicators related to pre and post-distributive policies. The results present three types of model: (1) coordinated economies, typical of neo-corporatist Scandinavian countries; (2) mixed economies, typical of Mediterranean systems, and (3) uncoordinated economies, which equate to liberalism and the Latin American ‘structural heterogeneity’ model. It is neo-corporatist coordinated economies that generate the most pre and post-distributive equality. In turn, uncoordinated economies, and Latin American ones in particular, generate more inequalities due to highly informal employment and the weakness of their post-distributive institutions.

Keywords Collective bargaining · Centralisation · Wage coordination · Inequalities · Employment · Unemployment · Informality · Segmentation, neo-corporatism

A. Martín-Artiles (✉)

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: Antonio.Martin@uab.cat

E. Chávez-Molina

Instituto de Investigaciones Gino Germani, Universidad de Buenos Aires,
Buenos Aires, Argentina
e-mail: echavez@retina.ar

R. Semenza

Dipartimento di Scienze Sociali e Politiche, Università degli Studi di Milano, Milano, Italy
e-mail: renata.semenza@unimi.it

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2.1 Introduction

The aim of this chapter is to define the institutional characteristics of the coordination of social models to explain pre and post-distributive inequalities. The purpose is to offer a conceptual framework for comparison between the institutions and inequalities in the member countries of the INCASI project, both in Europe and Latin America.

Regulatory institutions that work to correct inequalities can be divided into two groups depending on when they operate: (1) those that are designed to directly act *ex ante* upon the source of inequalities in the labour market, and which we call pre-distributive, and (2) those that do so *ex post*, i.e. that act to mitigate inequalities that have already been generated in the labour market, and which we call post-distributive (Hacker 2011; Zalakain and Barragué 2017). In other words, we seek to observe the interaction between labour relations and welfare systems. By doing so, we hope to get closer to finding an explanation for social inequalities and the ways they can be mitigated (Esping-Andersen 1990, 2000). In a way, this chapter compares different kinds of capitalism by comparing their social institutions (Menz 2008; Burroni 2016), although different kinds of capitalism are not only explained by their institutions, but also by their historical and cultural characteristics, their financial structures and their ties to the world economy (Schneider 2009).

This study is guided by two questions: (1) What are the institutional mechanisms for coordination between the labour market and social protection? (2) How were inequalities managed between 2007 and 2017 in the European and Latin American countries that have been participating in the INCASI project?

In the late nineteenth century, social inequality was such a big issue in the west that it gave rise to the so-called “*social question*” (Castel 1997). In the twentieth century, the bulk of European and Latin American states built institutional architectures that were designed to mitigate social inequalities and which (albeit modified) still exist today. Historically, this architecture has been designed from two perspectives.

First, the labour movement and trade unionism have sought to find a response to inequalities through the institutional recognition of individual and collective labour rights (Barragué 2017). The institutionalisation of labour relations (which before then had been managed on an individual basis) has therefore played a fundamental role in improving the bargaining power of trade unions (Hyman 2000). This institutionalisation played a historically important role (after World War II) by establishing strong opposition to business organisations and the state. The institutionalised involvement of social actors paved the way for political exchange and the social pact between capital and labour in order to reduce pre-distributive inequalities in the labour market.

Secondly, political parties and parliaments have sought to respond to post-distributive inequalities through social protection institutions (unemployment benefits, pensions, sick pay, etc.) whose goal, put briefly, has been to mitigate the social inequalities that are generated by a market economy (Barragué 2017; Ferdosi 2019).

After this introduction, the chapter is divided into four sections. The first deals with the conceptualisation of pre and post-distributive institutions. In the second section, we propose a model for comparative analysis between 26 countries that are part of the context to which the INCASI members belong, and which is built around the chosen set of indicators that are detailed in this section. The third part presents the results of the comparative study and the formalisation of models that reflect the institutional architecture used to manage inequality. Finally, the fourth section offers some conclusions.

2.2 Conceptualisation

The concept of pre-distribution has a long history linked to the development of the labour and trade union movement. One of the biggest milestones for improving the social status of workers concerned labour contracts. The shift from labour contracts governed by Civil or Commercial Law to labour contracts regulated by Labour Law in the nineteenth century and the early decades of the twentieth century was one of the greatest achievements of the trade union movement (Herpple 1994). This social advance came together with union rights, such as the right to representation, collective bargaining and participation of workers' representatives in socio-economic institutions. In short, those historical achievements helped to boost the influence of workers on the labour market and pre-distributive policy.

The inter-classist alliance between trade unions (working classes) and political parties (middle classes) has played a fundamental role in the development of pre-distributive policies, and in both Europe and Latin America has marked different political movements, such as social democracy, Christian democracy, communism, developmentalism and even other historic national movements such as Peronism and Vargism, to name but a few (Horowitz 2011). There have been two particularly important milestones for progress in the rights of representation, participation, information, consultation and collective bargaining: the Treaty of Versailles in 1919 and the ILO Declaration in Philadelphia in 1944. Both events led to the expansion of pre-distributive institutions in European and some Latin American countries. In other words, they led to the social integration of the market (Polanyi 1989) and the subordination of the labour market to politics (Hyman 2018). One result of this process is that trade unions have specialised in action on pre-distributive policies and political parties have specialised in post-distributive action. However, both kinds of action are nevertheless complementary. The mechanism for coordination in the labour market is collective bargaining, which can serve to reduce inequalities (Molina and Rhodes 2007).

The current debate is polarised. On the one hand, the liberal movement has emphasised the role of pre-distributive strategies, while the social-democratic and left-wing spheres have emphasised articulation between the classes in order to coordinate pre and post-distributive policies. Today, the need to coordinate pre and post distributive policies is especially topical due to the extent of austerity policies in

Europe. Three factors explain the difficulties faced by post-distributive policies: (1) globalisation, which makes capital and consequently the application of the right tax redistribution policy hard to control; (2) unstable jobs and subsequent wage devaluation; (3) digitalisation and technological innovations that are changing occupational structures (Hacker 2011). The response to these difficulties with post-distributive policies involves examining pre-distributive policies in order to correct inequalities *ex ante*, whereby “*it is better to prevent than to cure*” (Barragué 2017).

In short, in this conceptualisation we shall analyse two dimensions (Fig. 2.1): (1) *pre-distributive* institutions, which include the labour market and collective bargaining, and which may or may not help to reduce inequalities; and (2) *post-distributive* institutions, which refer to the functions of the Welfare State in European countries or otherwise the application by the state of social policies in Latin America. The concept of pre and post-distribution has been taken up once again since the study by Hacker (2011), and is featuring ever more prominently in the literature (Barragué 2013, 2017). These concepts are relevant to comparative studies because they can be used to explain the current reforms and trends in social policies (Zalakain and Barragué 2017).

2.2.1 Pre-distributive Institutions

As already mentioned, the pre-distributive dimension refers to the institutions, standards and procedures that aim to correct inequalities in the labour market (Hacker 2011). The labour market is one of the sources of income inequality as a result of

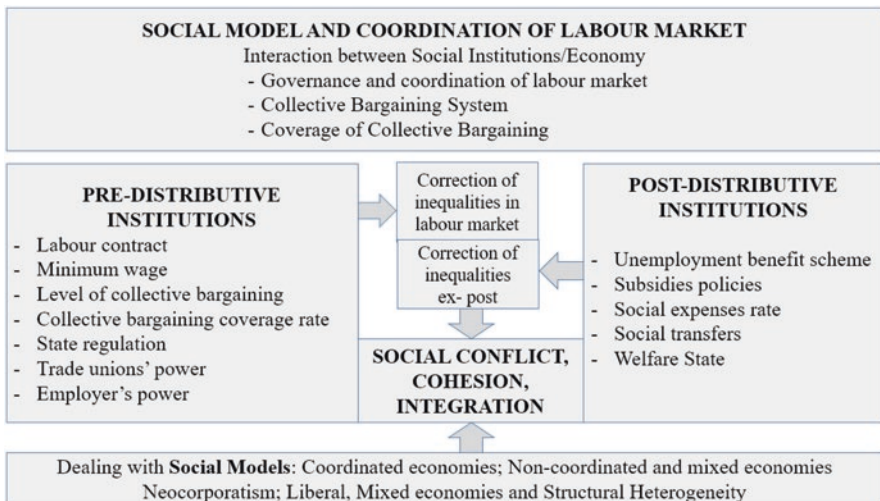


Fig. 2.1 Social model. Analytical conceptualization. Source: own elaboration

formal or informal employment, as well as job quality. The market generates potentially huge wage differences, with a greater or lesser risk of poverty. In particular, formal or informal employment is related to differences in people's economic uncertainty in terms of income and professional careers. We therefore assume that there are countries with labour markets that generate more inequalities than others in terms of opportunities for employment and job quality, informality, stability or instability, as we shall see later in the comparison between countries.

The main pre-distributive institution in our societies is collective bargaining between employers and unions, which helps to improve wages and labour conditions. According to Piketty (2014: 392) an understanding of the history of the reduction of inequalities needs to consider developments in the minimum wage, labour standards, collective bargaining, professional qualifications, technological innovation and increased productivity. In short, the labour market is a “*social construct based on specific rules and compromises*” of a political and unionist nature.

Another institution involved in the coordination between the labour market and social protection policy is *tripartism* (employers' organizations, trade unions and governments),¹ which in many countries takes the form of Economic and Social Councils, or Wage Councils, which frequently adopt a typically neo-corporatist institutional structure, which is important for the coordination of economic policy (Menz 2008; Burroni 2016). In other words, neo-corporatism is a form of institutionalisation of social consensus that involves the government, businesses, unions and even consumer organisations. Hence, countries with neo-corporatist structures are known as *coordinated economies* (Hall and Soskice 2001). In short, we could say that institutions such as social consensus, collective bargaining and social distribution systems, can be used to achieve *relative decommodification of labour* (Esping-Andersen 2000).

2.2.2 *Post-distributive Institutions*

The post-distributive dimension refers to ex post policies aimed at mitigating inequalities that were generated in society beforehand, such as unemployment benefit, health and maternity insurance and benefits, pensions, and disability benefits, as well as subsidies that seek to correct and mitigate financial inequalities and the risk of poverty. The institutions involved in the post-distributive dimension are social security, public employment services, vocational training and retraining centres, etc. In short, what is defined as the Welfare State in Europe, or ‘State Action’ in terms of the implementation of social policies in Latin America.

The austerity programmes that have been promoted in Europe since 2007 have led to post-distributive policy characterised by the overburdening of unemployment

¹Tripartism is a concept used by the ILO to refer to the Social Dialogue between government, employers and trade unions and their participation in certain institutions. The term is sometimes used to illustrate the inexistence of neo-corporatist structures.

benefit systems due to such high unemployment rates (Hacker 2011), as well as temporary work contracts causing people to continually register and unregister for benefits. The Great Recession has led to more social expenditure and high public debts derived from the payment of pensions and subsidies to prevent severe poverty (Ferdosi 2019). In this context it can reasonably be imagined that national governments and the European Union would encourage pre-distributive policies rather than post-distributive ones. Examples of this are so-called *private occupational pension schemes* (Natali et al. 2018a, b), i.e. retirement pensions and the provision of health, educational and professional retraining services through capitalisation while people are in active employment (Martín Artiles and Molina 2015).

2.2.3 *Coordinated and Uncoordinated Economies*

As part of the debate on the varieties of capitalism and from the concept of coordinated-uncoordinated economies, we differentiate between four models in our analysis.

2.2.3.1 **Strong Neo-Corporatism**

Coordinated economies typically have institutions for bilateral (employers-unions) or tripartite (including the government) collective bargaining in which labour and pay conditions are negotiated in a centralised manner (Molina and Rhodes 2007; Menz 2008, among others). Coordinated economies are better equipped to coordinate macroeconomic policy and to control the behaviour of wages and inflation, but also to link such policy with the goals of redistributive social policy. Burroni (2016: 55) summarises the *strong neo-corporatism* of northern Europe in terms of the following characteristics: (1) existence of a strong workers' movement organised through coordinated and representative unions; (2) unions supported by high membership rates and that are well-established in the public sector (education, health and public administration); (3) trade unions and employers' organisations with major institutional involvement in the formal and informal regulation of the labour market; (4) relations between social actors that are predominantly centralised at the national level, generating an umbrella to protect collective bargaining at lower levels, such as the activity sector and company levels.

This model represents strong institutionalisation of trade unions, and their high membership rates are related to their co-management of occupational pension funds and unemployment benefits. This model is called the *Ghent System*, after the city where it was first implemented (Ghailini and Peña-Casas 2018). In short, the coordinated economies of strong neo-corporatist countries typically involve agreement between social actors on financial, fiscal and industrial policy in a coordinated manner with the control of inflation and wages. This, in turn is coordinated with welfare measures, social expenditure, public services and active employment policies

(Smith 1999). Therefore, social dialogue between employers, unions and governments plays an important role in macroeconomic governance. This coordinated procedure is still very much alive and well in Scandinavian countries.

In some countries, economic policy is centralised and coordinated at the national level (Scandinavian countries), in others it is done at the mesosocial, sector-national level (for example, in Germanic countries, Spain and Italy). Coordinated economies not only require centralisation of collective bargaining, but also for unions and employers' organisations to be coordinated at different levels, so that decisions can be made and demands can be coordinated from the bottom all the way to the top, which is why we speak of *organised capitalism* or *social integration in the market* (Polanyi 1989; Albert 1991; Hall and Soskice 2001). These countries therefore have high union membership, and the countries of the so-called *Ghent System* or *strong neo-corporatism* (Sweden, Norway, Denmark, Finland and Belgium) are paradigmatic examples of this, where capital and labour have a long-term strategic commitment to certain employment, social protection and labour peace goals (Smith 1999). In short, this is the result of the political exchange between capital and labour. We could therefore deduce, like Calmfors and Driffill (1988), that countries with highly coordinated economies are the ones the lowest wage dispersion.

Other countries like Germany and Austria fit an intermediate model of sector-level neo-corporatism (Menz 2008). These countries typically feature strong institutionalisation of social conflict, which is guided by procedural regulations that tame the ways in which conflict is expressed (Esping-Andersen 2000). However, in opposition to this institutionalisation of conflict, the state and businesses are committed to correcting inequalities (*ex ante*) through collective bargaining and social dialogue. Put briefly, it is a case of correcting inequalities in the labour market itself, either through collective bargaining of a minimum wage or by agreeing with the government to a *minimum inter-professional wage* or through the legal extension of agreements in the form of *Erga Omnes* clauses.

2.2.3.2 Mixed Coordination

Some authors (Schneider 2009) have proposed the idea of hybrid or mixed economies to explain the semi-coordinated and market hierarchy forms of labour markets in Mediterranean countries. In greater detail, Molina and Rhodes (2007) consider the existence in Spain and Italy of a third type of mixed economy, with systems for coordinating wage policy through collective bargaining at the macroeconomic level, but with major incoordination and disorganisation in certain segments of the microeconomic level, such as small businesses, although the government tends to correct dysfunctions in the coordination between the macro and micro levels with such instruments as the regulation of the minimum wage and the *general efficacy* of collective agreements that acquire the *force of law*. Unions and employers' associations hold major political influence, but in these countries the volume of informal employment is a certain burden that hinders the coordination of collective bargaining, the treatment of wages and the taxation of labour.

2.2.3.3 Uncoordinated Economies

In contrast to the aforesaid coordinated neo-corporatist economies, there are other liberal countries (United Kingdom, Ireland and the United States, from the central countries, Chile, Peru, Mexico and Colombia, from Latin American countries, among others) that are considered uncoordinated market economies (Hall and Soskice 2001). In these, the labour conditions are mainly set on the basis of the free interplay between supply and demand in the labour market. The market is viewed as a principle of social and self-regulated order that by its own internal logic leans towards balance and efficiency. Therefore, any state intervention that is not aimed at ensuring institutional conditions for supposedly fair and healthy competition is seen to be counterproductive because it artificially alters internal market logic.

It is relevant to note that in these liberal societies there are also decentralised collective bargaining institutions at the company level, but this implies greater wage dispersion. The decentralisation of collective bargaining has historically enabled these societies to adjust wages to companies' specific levels of productivity, which also offers the comparative advantage of more flexible labour conditions and more rapid adjustment of the economy (Calmfors and Driffill 1988). On the other hand, as a negative outcome, these countries have greater inequality in the labour market. They typically have weaker unions and employers' organisations in what is known as *unorganised capitalism* (Albert 1991; Hall and Soskice 2001). In short, policies depend more on the labour market and less on social agreements between government, unions and business.

2.2.3.4 Latin America, the Burden of Informality

In Argentina, Brazil and Uruguay there are also institutions of corporatist origin that play a certain role in collective bargaining. Unions have political influence, albeit fragmented. These countries cannot be considered to have coordinated economies because their high volume of informal labour and employment prevents effective coordination of collective bargaining, wage policy and taxation of wages. This hinders pre and post distribution. We are therefore talking about a strong duality between employment and wages in the formal sector, which is relatively negotiated with trade unions, and a high volume of informal labour. This duality is a form of labour market segmentation, which in Latin America is viewed as a kind of *Structural Heterogeneity* (Presbich 1981) or *Hierarchical Market Economy* (Schneider 2009: 555). The concept of structural heterogeneity is more complex and important: it is defined not only by the segmentation of the labour market, but also by the coexistence of vestiges of pre-capitalist economies of an informal and non-mercantile nature in sectors whose productivity is lower than others, which in turn generates major social inequality. The origin of this concept can be found in Presbich (1981), who as early as the 1960s was relating structural heterogeneity to the imbalanced exchange between the developed centre and underdeveloped peripheral economies (Nohlen and Sturm 1982; Cena 2010; Cimoli and Porcile 2019). The

main conditioners of Latin American capitalism are dependence on the foreign export of raw materials, an under-qualified workforce and atomised labour relations (Schneider 2009: 554).

Meanwhile, in the case of Argentina, Brazil and Uruguay, it seems more appropriate to speak of *tripartism*, which expresses the idea of the existence of social dialogue between government, unions and business, with participation in certain social institutions. But we must stress that these are still dualised and hierarchical economies. This model gained importance from the 1940s. Martínez Fronzoni and Sánchez-Ancochea (2018: 204) characterise these countries as *universalist-stratified* or *conservative-informal* regimes. The idea of ‘conservative’ comes from the way they draw on the Bismarkian model, based on access to protection via labour status, which is financially tripartite, and grounded on a contributory system, but they are unequal due to the high volume of informal employment, which leaves a large number of people unprotected.

2.3 Analysis Model

Based on the above conceptualisation, we establish a general hypothesis where we understand that liberal regimes, with a decentralised bargaining system and no wage coordination, are more unequal than countries with centralised neo-corporatist regimes. On the contrary, neo-corporatist regimes, with centralised collective bargaining and high coverage rates tend to reduce inequalities in terms of wages and working conditions.

Moreover, countries with a high volume of informal employment, as is the case of those in Latin America, are expected to lack the capacity to govern wage behaviour, and neither do their workers have sufficient capacity to contribute to social protection systems that offer coverage for unemployment or retirement.

To test this general hypothesis, we constructed an analysis model based on four dimensions: institutional coordination mechanisms, pre-distributive indicators, post-distributive indicators and income inequalities, as shown in Table 2.1.

The institutional dimension includes two indicators:

1. Wage coordination. This variable is divided into five categories, following the database produced by Visser (2018). Countries that have a stable centralised framework at the national level to fix the rise in wages in a certain range, or otherwise where wages are imposed by government decision, have been given a score of 5, which indicates high centralisation of collective bargaining. Meanwhile, 1 equates to decentralisation of collective bargaining at the company level. The other values indicate intermediate positions in the scale. The value 4 category indicates the existence of bipartite negotiation between employers and unions and sets standard wages for collective bargaining at the sector and company level. This group includes the countries grouped under the neo-corporatist model, such as Austria and Germany, which has been characterised by a form of

Table 2.1 Dimensions, variables and sources

Dimension/Variables	Sources
Institutional mechanism	
1. Level of coordination of Collective Bargaining (1 = company versus 5 = pick level)	Institutional Characteristics of Trade Unions, Wages setting, State Intervention and Social Pacts (ICTWSS) 2018 (Visser 2018)
2. Coverage rate of collective bargaining	
Pre-distributive	
3. Occupied rate	ILOSTAT (2018)
4. Informal occupational rate	ILOSTAT (2018); CEDLAS L.A. American Bank U
Post-distributive	
5. Social expenses in % of GDP	Eurostat 2018 y Cedlas World Bank L.A. 2018 OCDE Outlook 2018
6. Coverage rate of Unemployment protection	
Inequality of income	
7. Labour Gini Laboral, pre-distribution	Eurostat 2018 and Cedlas World Bank, L.A. 2018
8. Gini Post-distribution	

Social Partnership consisting of a tradition of sector-level agreement between Chambers of Commerce, business organisations and unions (Menz 2008). At level 3 we have countries that agree on the coordination of wages in an irregular manner, depending on the economic circumstances or crisis situations. Centralised coordination is limited, but the wage decisions at the company level are also limited, as is the case, for example, in Spain, Italy, Argentina, Uruguay and Brazil, among others. Level 2 equates to weak wage coordination, which is based on activity sector agreements in coordination with company agreements, or sometimes both levels, as is the case in France. And finally, at level 1 we have liberal countries (such as the United Kingdom, Ireland, the United States, Chile and Mexico), which only set wages at the company level, according to their level of productivity, which is viewed as the flexible model (Calmfors and Driffill 1988). In short, these five categories involve measurement of strongly coordinated neo-corporatist economies versus liberal uncoordinated economies.

- The coverage rate of collective bargaining. The considered variable refers to the percentage of workers covered by collective bargaining agreements. This indicator shows the degree of application of agreements and reveals the monitoring, discipline and efficacy of organisations when it comes to applying wage agreements and labour conditions. It is a relatively important indicator, and is justified here because it indicates an aspect of the influence and power of trade unions, as well as their degree of unification and coordination of levels of negotiation between company, sector and state (Esping-Andersen 2000).

The pre-distributive dimension considers employment to be the main component, as it is the principal means of social integration and access to social rights

(Esping-Andersen 2000). Employment can also be a source of social inequality, which is why we take two variables:

3. The employment rate. Indicates how employable a society is.
4. The informal employment rate. Informal employment is an obstacle to redistribution because it excludes tax payments as required to fund certain contributory welfare state systems.

The post-distributive dimension includes the following two indicators:

5. Expenditure on social policies. Variable that includes spending on subsidies and transfers to families. The level of social expenditure over GDP indicates the capacity of Welfare States to correct or mitigate the inequalities generated by the labour market (Esping-Andersen 2000; Del Pino and Rubio 2016).
6. The unemployment benefit coverage rate, which is an indicator of correction of the inequalities generated by the loss of employment and which is an important policy for combatting severe poverty.

Finally, the income inequality dimension involves two indicators:

7. The labour, or pre-distributive, Gini Index, to show inequalities in income from labour before transfers.
8. The post-labour, or post-distributive Gini Index, after transfers, which shows the inequalities in the labour market and how effective post-distributive policies are at correcting them.

This set of indicators has been analysed using a selection of 26 countries as shown in the data in Table 2.2.

2.4 Results: A Comparative Study

2.4.1 *Context and Trends of Inequalities 2007–2017*

A first contrast between Latin American and European countries that have participated in the INCASI project is the context and the different impact of the financial crisis, known as the Great Recession in European countries, but not in Latin America. The differences in impact can be seen through changes in the indicator of gross domestic product per capita, measured in constant euros in purchasing power parity (see Table 2.3) and which also shows the differences in the levels of wealth between countries. In European countries the recession is reflected by the drop in gross domestic product per capita between 2007 and 2013, the lowest point of the recession. As shown in said Table 2.3, Spain, Italy, France, Finland and the United Kingdom recessed in that period. But from 2013 to 2018 the GDP per capita slowly started to rise again in those European countries.

In contrast, Latin American countries witnessed growth in GDP per capita between 2007 and 2013, except Mexico, which was stagnant. From 2013 to 2018,

Table 2.2 Institutional indicators

Countries	Institutional coordination indicators			Pre-distributions indicators		Post-distribution indicators			Inequalities indicators	
	Wage coordination: level of collective bargaining	Coverage rate of collective bargaining %		Employment to population ratio %	Informal employment rate %	Social expenses (in % GDP)	Unemployment protection coverage rate %	Gini Pre	Gini Post	
Argentina	3	63.4		54.8	47.1	4.9	14.3	45.7	41.3	
Austria	4	98.0		57.3	10.0	90.5	26.6	33.8	28.0	
Belgium	5	96.0		65.6	13.5	80.2	28.9	33.6	26.0	
Brazil	3	65.0		55.9	46.8	8.0	15.1	54.4	53.0	
Bulgaria	2	29.0		52.4	15.9	25.6	16.0	43.4	40.0	
Chile	1	18.1		57.9	22.2	29.9	16.1	50.1	43.1	
Czech Republic	2	47.0		58.8	9.2	21.2	18.7	28.2	24.0	
Denmark	4	84.0		58.9	11.2	77.2	28.0	36.7	28.0	
Finland	5	93.0		54.0	6.3	59.2	28.7	34.3	25.0	
France	2	98.0		50.0	9.8	56.2	31.2	35.7	29.0	
Germany	4	57.6		58.5	10.2	88.0	25.1	35.0	29.0	
Greece	2	42.0		42.7	32.8	43.1	23.5	36.0	33.0	
Hungary	1	23.0		54.1	12.2	31.4	19.4	33.9	28.0	
Ireland	1	40.5		58.0	13.5	21.6	14.4	41.6	31.0	
Italy	3	80.0		43.9	19.0	56.8	27.9	34.9	33.0	
Netherlands	4	84.8		60.9	9.4	61.9	16.7	32.6	27.0	
Norway	4	67.0		61.0	7.3	61.8	25.0	35.0	26.0	
Poland	1	14.0		54.8	38.0	16.8	21.1	33.6	29.0	
Portugal	2	67.0		54.7	12.1	42.1	22.6	36.9	34.0	
Slovakia	3	25.0		55.7	16.7	11.2	17.0	38.1	24.0	
Slovenia	3	65.0		54.8	5.0	30.8	21.2	38.1	23.0	
Spain	3	77.6		48.5	27.3	46.9	23.7	38.1	34.0	
Sweden	4	89.0		60.2	8.2	28.0	26.1	38.1	28.0	
United Kingdom	1	29.5		59.9	13.3	62.6	20.6	40.9	33.0	
Uruguay	3	60.0		59.2	44.3	27.9	16.0	45.3	35.7	
USA	1	11.9		62.8	36.0	26.5	18.7	45.2	41.5	

Sources: Visser (2018), ILOSTAT (2018), OECD (2018)

Table 2.3 Gross domestic product/Total population in average constant income in euros PPP constant (2018)

Country	2007	2013	2018	Difference 2007–2018 (%)
Argentina	21.858	26.848	24.775	13.30
Brazil	17.583	19.475	17.199	−2.20
Chile	23.497	26.537	26.872	14.30
Uruguay	18.311	24.113	25.661	40.10
Mexico	23.540	23.270	24.059	2.20
Spain	36.634	32.710	37.839	3.20
Italy	39.644	34.908	35.916	−10.50
France	41.444	40.906	42.808	3.20
United Kingdom	43.205	41.652	44.479	2.90
Finland	46.208	42.333	44.471	−3.80

Source: World Inequalities data base (2020)

Table 2.4 Comparative inequalities

Continent	Gini	2007	2017
Europe	Pre	0.3608	0.3688
	Post	0.3058	0.3090
Latin America	Pre	0.5204	0.4940
	Post	0.4808	0.4488

Source: Own elaboration with cited data

the economies of Argentina and Brazil seem to recede somewhat, while Chile, Uruguay and Mexico underwent moderate growth. So, the economic cycles were different in the two continents. Throughout the decade, the countries with the greatest growth were Uruguay (40%), Chile (14%) and Argentina (13%), while it was the European countries where there was the least growth. Even in Italy and Finland, GDP per capita fell by −10% and −3% respectively.

2.4.1.1 Changes in Inequalities

Table 2.4 offers a comparative overview of the evolution of the pre-distributive and post-distributive Gini Index. Throughout the studied period, two opposing trends are observed. For the Europe of the Great Recession as a whole, income inequality was practically maintained or slightly increased, while in Latin America there was no talk of a crisis, but instead a period of expansion that led to a moderate reduction in inequalities.

These global results differ somewhat by country (Table 2.5 and 2.6). In Spain, the gap between the labour and post-labour Gini Index was 0.031 in 2009. By 2017, the labour Gini had increased on the 2009 level, which reflects the large amount of unemployment in the period and the country's hard wage devaluation policy. However, social expenditure managed to reduce the gap by 0.040 points. In France,

Table 2.5 Pre and post-distributive Gini Index. European countries

Country	Year	Pre	Post	Difference
Spain	2009	0.360	0.329	0.031
	2017	0.381	0.341	0.040
France	2009	0.356	0.299	0.057
	2017	0.357	0.293	0.064
Italy	2009	0.336	0.318	0.018
	2017	0.349	0.327	0.022
Finland	2009	0.338	0.259	0.079
	2017	0.343	0.253	0.090
UK	2009	0.414	0.324	0.090
	2017	0.414	0.331	0.083

Source: own elaboration based on Eurostat 2019

Table 2.6 Inequalities in Latin America: Gini Index

Country	Year	Pre	Post	Diferencia
Argentina	2007	0.484	0.457	0.027
	2017	0.457	0.413	0.044
Brasil	2007	0.566	0.548	0.018
	2016	0.544	0.530	0.015
Chile	2007	0.513	0.460	0.053
	2015	0.501	0.431	0.069
México	2006	0.510	0.489	0.021
	2014	0.515	0.513	0.002
Uruguay	2007	0.529	0.450	0.079
	2016	0.453	0.357	0.096

Source: SEDLAC (CEDLAS and The World Bank)

the labour Gini Index barely changed between 2009 and 2017, where social expenditure was able to significantly reduce the differences between 2009 and 2017. In Italy, the labour Gini Index rose between 2009 and 2017, which also reflects the high volume of youth unemployment. The difference from the Gini Index after transfers was the lowest of the five countries considered, which is an indicator of the reduction in social expenditure. In Finland, the differences in the labour Gini also increased between 2009 and 2018, but in both years social expenditure achieved a sharp reduction in the post-transfer Gini Index. Finally, in the United Kingdom the labour Gini Index was the highest, both in 2009 and 2017, reflecting greater inequality in the labour market, which correlates with the decentralised collective bargaining system. However, the decrease in the post-labour Gini was considerably large in both years.

All the chosen European countries, through participation in the INCASI project, made an effort to reduce the divide between the two indicators of inequality, with Finland being the country that made the biggest effort, even though it has the least inequality.

In the Latin American countries, the distances between the two types of Gini were also lower thanks to the period of economic expansion. In Argentina, Brazil, Chile and Uruguay, inequalities in both indicators were reduced between 2007 and 2017, boosted by the social policies of progressive governments, as also confirmed in the study by Amarante et al. (2018). However, in Mexico the inequalities reflected in the labour and post-labour Gini Index increased in the same period. In general, we can consider Latin America, in the words of Martínez Fronzoni and Sánchez-Ancochea (2018: 201), “the region of the world with the greatest inequality compared to the world average”, and, in particular, with a huge difference in between urban and rural settings. Uruguay is the country that has made the greatest effort to reduce inequalities, with a social model that is closer to the European one.

The fact that there are such a large number of informal activities in Latin America can be viewed, despite being seemingly contradictory, as the governmental ‘remedy’ to deal with the issue. In a way, there is a kind of formal/informal complementarity, given its historical origin on the overlap between capitalist and non-capitalist practices. However, *Structural Heterogeneity* limits the state’s regulatory strategy, so it seems to have no option but to resort to resignation and functional adaptation of the formal economy to the informal one. Tolerance of informality in a large proportion of economic activity is thus a short-term remedy to combat poverty. But such tolerance limits the coordination of pre and post-distributive policies.

2.4.2 Comparison of Models: Differentiation Factors

The participant countries in the INCASI project have different pre-distributive and post-distributive models. The differences between these countries do not only relate to their different levels of wealth, but also their different *institutional arrangements* of coordinated, semi-coordinated and uncoordinated economies (Hall and Soskice 2001).

To analyse the interrelationship between the eight variables considered in our model, we have applied a Principal Components Analysis to observe the inter-correlations and to reduce the information from the set of variables to two main dimensions or factors. Table 2.7 shows the variables considered and their correlation with each of the two retained factors. The variance explained by both is 69%.

The first dimension is the most decisive, with 51% of the variance explained. It is especially defined by the unemployment coverage rate, social expenditure, and the collective bargaining coverage rate, on the one hand, as opposed to the informal employment rate along with indicators of income inequality, on the other. This shows that the greater the number of workers protected by collective bargaining and social protection, the lower the inequalities.

A second dimension of less weight, 17%, highlights the higher levels of income inequality associated to institutional coordination, opposing features in the first factor and that here tend to generate specific features that shift slightly away from the other indicators.

Table 2.7 Component matrix

	Component	
	1	2
Unemployment protection coverage rate	0.827	0.150
Social expenses (in % GDP)	0.803	0.183
Gini pre-distributive	-0.786	0.482
Gini post-distributive	-0.782	0.513
Informal employment rate	-0.751	0.398
Coverage rate of collective bargaining	0.721	0.581
Wage coordination: level of collective bargaining	0.684	0.564
Employment to population ratio	0.079	0.036

Source: Own elaboration

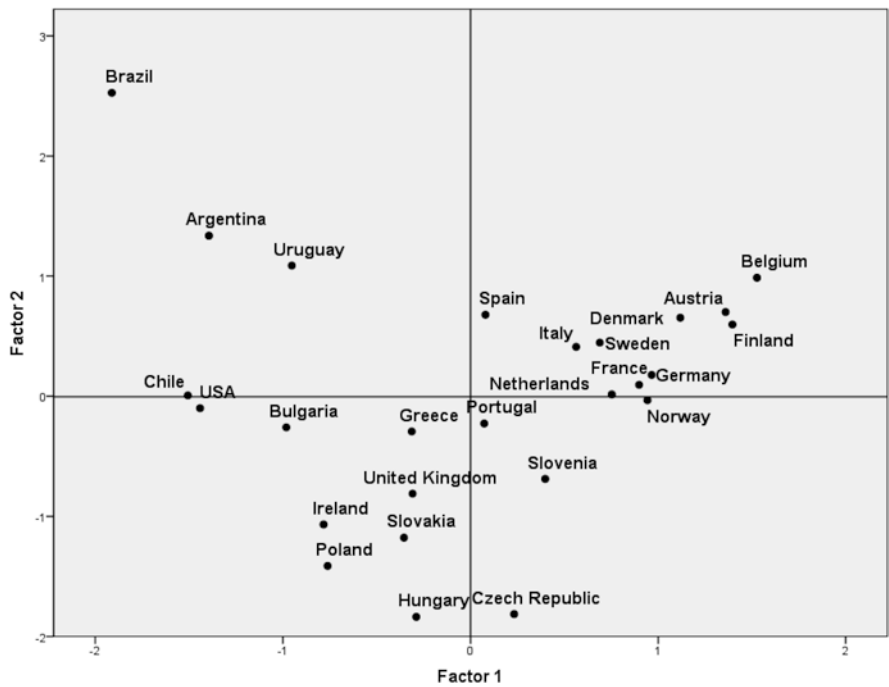


Fig. 2.2 Positioning of the countries. Source: Own elaboration

The crossover of these two dimensions with the position of the studied countries is shown in Fig. 2.2, where four quadrants can be distinguished.

The first quadrant is made up of the countries with the highest informal employment, high inequalities in the pre and post-distributive Gini Indexes and a low unemployment coverage rate, such as Brazil, Argentina and Uruguay. The second quadrant is features countries that have high centralised coordination of collective bargaining and a high volume of social expenditure, such as Belgium, Finland,

Denmark and Sweden, countries that are representative of the Ghent System, neo-corporatism and coordinated economies (Hall and Soskice 2001), as well as others that are considered to be ‘medium’ neo-corporatist countries (Menz 2008). The third quadrant includes countries that share a decentralised collective bargaining system and therefore have large wage differences that are reflected in the pre-distributive Gini Index (Chile, USA, Ireland, United Kingdom, Bulgaria and Poland, among others). Finally, the fourth quadrant is made up of countries whose main characteristic is high coverage of the number of workers protected by collective bargaining, such as Norway, Holland and Slovenia, among others, and which are also considered neo-corporatist.

2.4.3 Similarities and Dissimilarities Between Social Models

Using hierarchical cluster analysis, we can now observe the distances, similarities and differences between the different analysed countries, taking into account the eight selected variables, and in order to group them into a typology of models. Standardising these variables, cluster analysis was performed by Ward’s hierarchical method. This analysis offers an integrated view of clusters of the most similar countries, with which the derived social models can be typified. Figure 2.3 and Table 2.8 present the formation of four clusters of countries as described hereinafter.

2.4.3.1 Cluster of Latin American Countries: Uncoordinated Informal Economies

Cluster 3 includes three Latin American countries: Argentina, Uruguay and Brazil, which share the phenomenon of Structural Heterogeneity. Four factors explain why they are located here: (1) they have a low, below average, level of social expenditure; (2) the number of workers with unemployment benefits is very low; (3) the inequality rates in the pre-distributive and post-distributive Gini Indexes are much higher than the average; and, (4) a high rate of informal employment, which hinders coordination between pre and post-distributive policies. Informal employment makes it difficult to govern wages through collective bargaining, as shown earlier, so Structural Heterogeneity (Presbich 1981) leads to inequality in Latin American countries acting in a similar way to the way it does in liberal countries, despite the fact that these three countries have intermediate systems between coordinating wages at the sector level and collective bargaining.

In fact, Argentina, Uruguay and Brazil form a group with certain sector-type neo-corporatist elements (Marticorena 2014), with a system of collective bargaining at the sector level combined with a large amount of informal employment and very low coverage of unemployment. In all three countries, there are major labour inequalities between the formal and informal sectors.

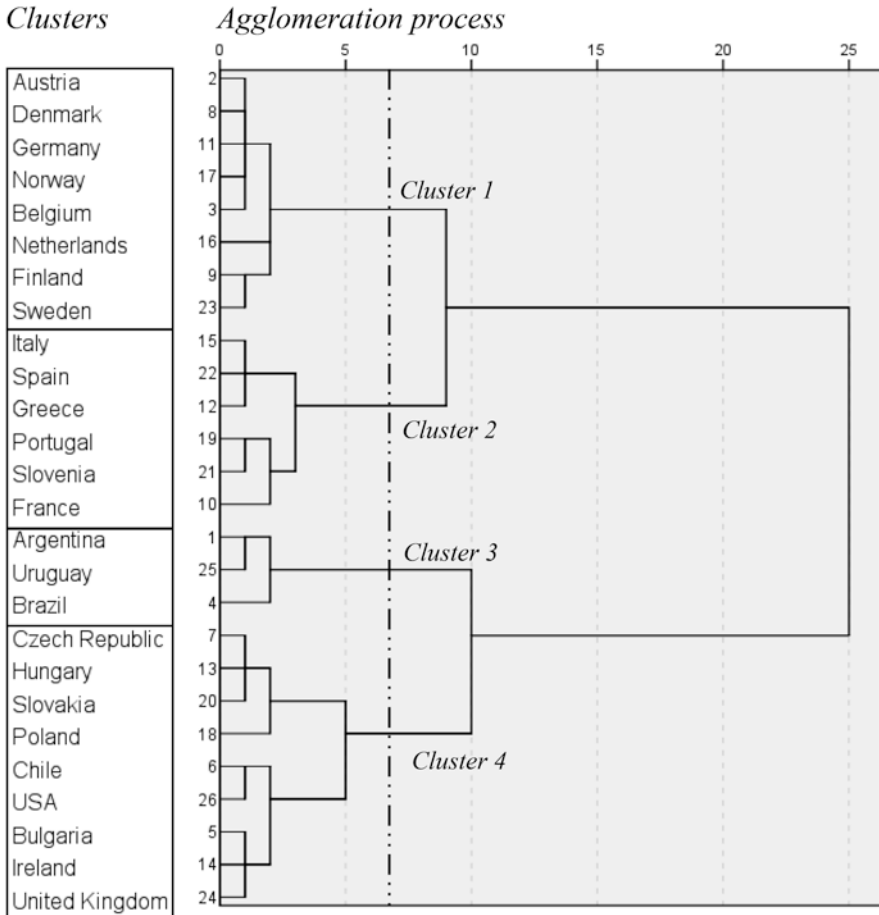


Fig. 2.3 Cluster analysis. Dendrogram. Source: Own elaboration from ILO & OCDE data

However, in Uruguay, the tradition leans more towards European social-democratic regimes. Meanwhile, neo-corporatism in Argentina dates back to the forties, and is associated with Peronism (Horowitz 2011), as in Brazil with the Getulio Vargas era. Chile is a peculiar case, because it has gone from a state protection model to the radically liberal capitalisation regime that was instated in 1980 (Castiglioni 2005). Mexico is another country where the state has retracted in terms of social protection.² In turn, the reforms introduced during the last decade in Brazil have been gradual, although it is also a segmented model.

But the Latin American model, conditioned by the large amount of informal employment, has led to the construction of fragmented, stratified protection systems (OIT 2018), features major obstacles to guaranteeing social agreement and the

²Not included in the data analysis discussed herein due to the difficulties to find information.

Table 2.8 Description of clusters obtained

Cluster	Institutional coordination indicators			Pre-distributions indicators		Post-distribution indicators		Inequalities indicators	
	Wage coordination: level of collective bargaining	Coverage rate of collective bargaining %	Employment to population ratio %	Informal employment rate %	Social expenses (in % GDP)	Unemployment protection coverage rate %	Gini Pre	Gini Post	
1	Average (N = 3) 3.0	62.8	56.6	46.0	15.1	13.6	0.484	0.433	
2	Average (N = 8) 4.2	83.6	59.5	9.5	25.6	68.3	0.348	0.271	
3	Average (N = 9) 1.4	26.4	57.1	19.6	18.0	27.4	0.394	0.326	
4	Average (N = 6) 2.5	71.6	49.1	17.6	25.0	45.9	0.366	0.310	
Total	Average (N = 26) 2.7	58.6	55.9	19.1	21.6	42.7	0.384	0.317	

Source: Own elaboration from ILO & OCDE data

efficacy of wage coordination mechanisms, and means that its social contribution schemes are insufficient as unemployment benefits cannot be extended to a greater number of workers due to the difficulties with tax contributions and the aging of the population. For these reasons, these countries are classed as uncoordinated economies. Some analysts (Martinez Fronzoni and Sánchez-Ancochea 2018) define the trend among Latin American regimes as a struggle between universalisation and segmentation: universalisation due to the increase in welfare policies and segmentation because of the formal/informal (and therefore protected and unprotected) dualisation of the labour market.

In short, the theory of Latin American Structural Heterogeneity is based on the characteristics of the state model, one of whose features is the coexistence of formal and informal economic sectors, where the most protected activities at first tended to be prolonged, only to then stagnate. And the participation of low productivity activities in production and employment tended to increase (Del Valle 2010). We are talking about an organic cohabitation process in which protected, high productivity activities tend to resemble European activities in the same conditions. On the other hand, there is another important low productivity sector, in many cases with subsistence activity, which tends to increase economic and, therefore, social divides. This process heightened the process of structural heterogeneity.

Given the Latin American case, it is worth asking whether the same is the case in Europe, with the segmentation of the labour market and a certain volume of informal employment in some countries.³ In short, it is worth asking how different social models have responded to the inequality that has been generated by the financial crisis.

2.4.3.2 Cluster of Neo-Corporatist Coordinated Economies

Cluster 1 differs considerably from the previous one, and is made of the countries with strong and medium neo-corporatist models, i.e. with centralised collective bargaining at the national level and also at the national-sector level, as well as a high number of workers protected by collective bargaining (83.6%); a high rate of unemployment benefit (68%); little informal employment (9%); high social expenditure (25%) and low inequality in the post-distributive Gini Index (0.271). Here we find the countries of the so-called Ghent System (Belgium, Sweden, Norway, Denmark and Finland), and also the Germanic countries (Germany, Austria and the Netherlands). All of these are classed as countries with coordinated economies, with institutionalised social agreements and centralised collective bargaining where macroeconomic policy has a 'bottom-up' influence from social agreements and

³According to Del Valle (2010) in Latin America neither is stratification an independent phenomenon from the forms of state intervention, for it responds to organised patterns, given how the State intervenes in stratification processes due to its role as an allocator of resources. In this regard, "the state defines the levels of commodification that operate in society since the practices of resource allocation reproduce, extend or reduce stratification processes".

negotiation. They have strong business and union organisations, mechanisms for monitoring and controlling wages to prevent dispersion, as well as policies aimed at mitigating the risk of considerable inequality in terms of income (Menz 2008). This data therefore agrees with the expected hypothesis: centralised neo-corporatist coordination reduces inequalities and promotes coordination between pre- and post-distributive policies. In this model, the inequalities expressed by the Gini Index are small because of the high amount of unemployment benefits and social expenditure.

2.4.3.3 Liberal Cluster: Uncoordinated Economies

Third, we consider the cluster formed by the countries with uncoordinated economies (cluster 4), with liberal labour relations (United Kingdom, United States and Chile, among others), with a decentralised collective bargaining system at the company level and low coverage of collective bargaining (26%), which influences inequality in the labour (0.394) and post-distributive (0.326) Gini Indexes. The unemployment protection rate is also low (27%), and the moderate volume of informal employment (19%) is below the average. These countries also have low social expenditure (18%). These are liberal countries that usually have micro-economic type policies, and have weak unions with little political influence for pre and post-distributive coordination (which is limited to the few companies where they are represented, and with low coverage of the number of workers, Molina and Rhodes 2007).

In short, both the decentralisation of collective bargaining at the company level (typical of uncoordinated economies), and informal employment (widespread in Latin America) generate strong dualized segmentation of labour relations, with a clear difference between protected (insiders) and unprotected (outsiders) workers. In conclusion, we could say that the results agree with the expected general hypothesis with regard to liberal countries. The unexpected finding is that Latin American countries have very similar results to liberal ones due to the large amount of informal employment and weak institution of social protection; such Unemployment Benefit Schemes and Pensions System (see Chaps. 13 and 14).

2.4.3.4 Cluster of Mixed or Semi-Coordinated Economies

Cluster 2 is formed by Spain, Italy, France, Greece, Portugal and Slovenia. These are countries with collective bargaining systems that mix centralisation at the sector level, semi-decentralisation at the territorial or regional level, and bargaining at the company level. In these countries, trade unions hold political influence and capacity for mobilisation, and although this representation is fragmented it does help to obtain better results and to generate mechanisms of state 'complementarity' (Molina and Rhodes 2007). In these countries, business organisations are fragmented, although the coverage rate of collective bargaining is nevertheless high (71%) because collective agreements have an *Erga Omnes* effect in France and Spain, and

are extended in Italy, where unemployment benefits (46%) and social expenditure (25%) are slightly higher than the mean, although informal employment is also above average. In mixed coordination economies, the state plays an important role in correcting the dysfunctions of coordination mechanisms, unemployment protection is fragmented, and economic inequalities are greater than in the corporatist system.

Finally, Table 2.9 presents a comparative summary of the four social models found. In short, we can say that the more centralised the models are, the less inequality, which demonstrates the greater egalitarianism among neo-corporatist regimes and reaffirms the general hypothesis. Neo-corporatist countries have centralised coordination and bargaining systems, which act like umbrellas to protect the weakest sectors during negotiation. We can conclude that countries with a high volume of informal employment are the most unequal, followed by liberal countries. Latin American countries appear in the clusters with the greatest inequality, while the countries with neo-corporatist labour relations are the most egalitarian, which confirms the general hypothesis.

2.5 Conclusions

Based on the above, we can offer three main conclusions: (1) a high coverage rate of collective bargaining helps to reduce inequalities; (2) the employment rate alone does not reduce inequalities, since jobs can be unstable, temporary, part-time, informal and poorly paid; and, (3) a high rate of informal employment conditions pre and post-distributive policy.

2.5.1 European Trends in Pre-distributive Policies

In Europe, the tendency in recent decades to make institutional pre-distributive reforms has been characterised by a series of changes of a liberal nature, which are leading to an increase in social inequalities in the labour market. Pre-distributive inequalities are reflected by the increase in the labour Gini Index. The trend can be summarised as a transition from *the socialisation of protection towards the individualisation of risk*. This implies a change in the principles on which the socialisation of risk has been upheld, whereby we could be witnessing a paradigm shift towards pre-distributive policies, rather than post-distributive ones: in short, a shift from the benefactor-protector paradigm to the Active Social State paradigm (Vielle et al. 2006; Boyer 2005; Cassier and Lebeau 2005).

Regarding the first question asked at the beginning (*What are the institutional mechanisms for coordination between the labour market and social protection?*), we can conclude that the coordination mechanisms are the level of collective bargaining and its degree of centralisation, as well as state regulation. We conclude that

Table 2.9 Comparative overview

Social model	Dominant form of coordination of micro-interactions	Source of complementarities	Re-enforcing mechanism of stability	Organizational	Collective bargaining System	Coverage of collective bargaining	Unemployment protection	Social expenses	Informal employment	Gini index
Coordinated market economies	Autonomous coordination among social actors	Bottom-up induced; top-down	High permeability of political system to domestic coalitions	Employers: strong and well-organised in sectors. Unions politically strong and well-articulated organisation	Centralised at pick level	High	High	High	Very low	Low inequalities
Liberal market economies	Market Segmentation of labour market	Market-induced coherence across policy arenas	High penetration of policymaking by exogenous economic forces	Employers fragmented; Unions strong at firm-level, but fragmented and politically weak	Decentralised at company and grant level.	Low	Low	Low	Medium	High inequalities
Mixed market economies	Mixed (autonomous coordination) with higher impact of regulation and state mediation	State regulatory changes aimed at correcting coordination failures and dysfunctional	Gate-keeping role of the state: veto power of domestic actors	Employers fragmented. Unions politically strong but fragmented and weakly articulated	Centralised and sectorial level	High	Medium	High	Medium	High inequalities
Structural heterogeneity	Autonomous coordination, but low impact in economy. High informal and fragmented markets; individualization. Atomisation of industrial relations	State regulatory with low capacity of control	Strong instability; complex governance	Strong Dualization: Regulated and informal employment. Employers fragmented. Unions politically strong (Argentina, Uruguay; Chile: weak unions at peak level; strong at firm-level)	Heterogeneity sectorial level (Argentina, Uruguay). Company level (Chile, México)	Low	Low	Very low	Very high	Very high inequalities

a social model is defined by the way it coordinates between pre-distributive and post-distributive policies, which has led us to view collective bargaining systems as important for reducing inequalities in the labour Gini. Wage coordination through collective bargaining (and extensive coverage in terms of the number of protected workers) introduces egalitarian wage patterns, as has been demonstrated in Scandinavian countries, which have been classed as strong neo-corporatism. The virtuous circle in these countries consists of a high volume of public employment (derived from the Welfare State), which in turn leads to high rates of union membership, which then puts political pressure on redistributive institutions. The experience of these countries shows that the centralisation of collective bargaining has an effect on redistribution and the coordinated economy model (Hall and Soskice 2001; Molina and Rhodes 2007).

The state's role is also important in the absence of a Neo-corporatist Social Partnership. In Spain and France the state plays an important role by granting *Erga Omnes* status (general effect) to collective agreements with the force of law, which is a way to influence wage behaviour and to align and coordinate salaries with the goals of economic policy.

Regarding the second question (*How have inequalities been managed between 2007 and 2017 in the European and Latin American countries that participated in the INCASI project?*), we have shown that liberal regimes are more unequal. But we have also found that informality contributes to inequality, without countries like Argentina, Uruguay and Brazil necessarily being classed as ultra-liberal. But there is no doubt that informality is also a form of *disorganised capitalism*, where market logic and the subsistence economy prevail. Disorganisation and non-coordination of wages has similar effects to those in certain liberal regimes. The effort to reduce inequalities not only depends on 'institutional arrangements' (Hall and Soskice 2001), but also on the economic cycle, as has clearly been demonstrated. On the one hand, inequalities in European countries increased during the Great Recession while, on the other, economic growth in Latin America has helped to reduce both types of Gini Index, although major inequalities continue to exist. However, the inequality problem is structural. We note that Piketty (2014) pointed out the existence of structural factors that generate inequality when considering the influence of such variables as education, vocational qualifications, technological innovation, segmentation, (weak) redistributive institutions, collective bargaining, labour contract regulation and the minimum wage, among others.

By way of contrast between Europe and Latin America, it is Europeans (Schwartz 2007) who have historically accepted the state's role as a corrector of the inequalities and imbalances generated by the market. This is an important point of difference with respect to the United States and Latin America, although in Argentina and Uruguay the state does still seem to be an important factor for regulating the economy and welfare (Del Valle 2010).

2.5.2 Discussion

The debate on the mechanisms for coordinating the labour market also touches on the varieties of capitalism and particularly two opposing models: that of Germanic neo-corporatism and that of Anglo-Saxon capitalism. Germanic capitalism is based on the idea of ‘*social market economy*’ that is included in the constitution of several European countries. Meanwhile, Anglo-Saxon liberal capitalism takes its inspiration from the politics of ‘*market discipline*’. The debate is not only economic between coordinated and uncoordinated economies, but also a political and moral one. These two orientations also lie behind the policies being discussed today in Latin America.

The divides between formal and informal employment are huge in Latin America, which weakens the pre-distributive process itself, as a huge contingent of workers are left out of the protection system, which must then be compensated in post-distributive processes. The informal economy weakens the capacity to fill the coffers of social protection. The neo-corporatist coordination model cannot be exported as the ‘*ideal type*’ to other countries because coordination requires connected and coordinated social agents (unions, employers), with the capacity to be representative of their social masses. Coordination can also be exercised by the state, but this requires the means and mechanisms for the control and inspection of labour.

The different models are not static. They are dynamic and are gradually changing as a result of liberal, neo-liberal or social-democratically inclined reforms, depending on the countries and their current situations. The trend is marked by a micro-economic orientation (Pedersini and Leonardi 2018), towards the decentralisation of collective bargaining, towards workfare and towards active policies. In short, towards the so-called Active Social State (Vielle et al. 2006; Boyer 2005). But there are also other trends that are headed towards the introduction of guaranteed universal income, conditioned income and raising the minimum wage. These political dilemmas are not isolated from the degree of potential social conflict, which is the other side of the coin. Consensus on order depends on balances that are closely related to cohesion and social integration. Consensus on social order depends on social institutions and not the market.

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Part II
Labour and Educational Inequalities

Chapter 3

Comparing Inequalities in the Labour Market from a Segmentation Perspective



Pedro López-Roldán, Renata Semenza, and Agustín Salvia

Abstract The purpose of this chapter is to carry out a comparative analysis of labour markets in Europe and Latin America from the perspective of segmentation in order to explain the processes of social inequality that arise in the workplace, in light of recent trends in global socio-economic changes. The chapter proposes two main objectives. The first is to perform a comparative descriptive analysis of the main features of labour markets among 60 European and Latin American countries. The second objective is to propose a model of comparative analysis of labour inequality from the theoretical perspective of the segmentation of the labour market and structural heterogeneity. We will focus our analysis by selecting two countries, Spain and Argentina, which both underwent a late development of capitalism. The following general hypothesis is formulated: Spain and Argentina, having clearly differentiated features in economic structure, level of development, institutional frameworks and socio-historical processes, show common dynamics in the structuring of the capitalist labour market between a primary and secondary segment. Using equivalent databases on the workforce a typology of segmentation of employment is constructed that show, in addition to the specificities of each country, the similarities in the structuring of the labour market.

Keywords Labour market segmentation · Structural heterogeneity · Social inequalities · Segmentation typology · Europe · Latin America

P. López-Roldán (✉)

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: Pedro.Lopez.Roldan@uab.es

R. Semenza

Dipartimento di Scienze Sociali e Politiche, Università degli Studi di Milano, Milano, Italy
e-mail: renata.semenza@unimi.it

A. Salvia

Observatorio de la Deuda Social Argentina, Universidad Católica Argentina,
Buenos Aires, Argentina
e-mail: agustin_salvia@uca.edu.ar

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3.1 Introduction

The general purpose of this chapter is to perform a comparative analysis of the labour markets in Europe and Latin America, focusing on the cases of Spain and Argentina, in order to develop a model for analysis from the perspective of labour market segmentation and thereby explain the processes of social inequality in terms of employment. The proposal is to do so by applying a single method of analysis to ensure coherent comparison of the structures of the inequalities in both labour markets, on the understanding that the two cases involve different institutional contexts and levels of economic development.

There are two objectives. The first is to conduct a comparative descriptive analysis of the main characteristics of labour markets in European (Spain, Italy, France, Great Britain and Finland) and Latin American (Argentina, Chile, Brazil, Mexico and Uruguay) INCASI member countries in the context of a selection of 60 countries from both territories. Using a series of indicators on the functions and structures of the labour markets in these countries, the main patterns that differentiate each of them are identified. This information presents the situation regarding labour in each country, revealing the common specificities and characteristics, and leading to the construction of a typology of models for the general structure of labour markets.

The second and principal objective is to propose a model for comparative analysis of labour inequality processes from the theoretical perspective of labour market segmentation and structural heterogeneity. After explaining the conceptual foundations of the analysis model, the following initial general hypothesis is formulated: European and Latin American countries, with clearly differentiated characteristics both in terms of economic structure and level of development, and with specific institutional frameworks and socio-historical processes, present similar dynamics in terms of structure of the capitalist labour market on the basis of a classification of labour segments of similar characteristics that structurally differentiates between a primary and secondary segment. To investigate this hypothesis, we shall focus the study on two chosen project countries: Spain and Argentina, which were both late to develop capitalism, although in clearly different socio-historical and institutional contexts. Using equivalent databases on the workforces in each country and standardising the information for comparative analysis, we produce a typology of labour segmentation in each country that presents the similarities in their labour market structures and their expression in terms of labour and social inequality. Hence our thesis is that there are common patterns of labour segmentation that are explained by the confluence of supply and demand factors in each country, albeit operated from particular institutional and developmental contexts and dynamics for which reason we require specific explanatory factors of these general shared mechanisms.

One of the classic concerns of sociology has been to identify the sources of social inequality. In contrast to the expectations of social theory (Parsons 1951), according to which modernisation has led to convergence and a reduction in disparities in income, consumption and lifestyles, inequalities have increased in global and

technological societies. Under the pressure of economic-organisational, political-institutional and social changes (Crouch 2014), labour markets are part of the scenario of globalisation and the development of digital technologies, whose combination is leading to a new international division of labour. The expansion of the tertiary sector and the decline of traditional institutions that oversee collective industrial relations are leading to an increase in non-standard labour conditions and new kinds of professionals in emerging economic sectors (Semenza and Pichault 2019), associated to platform capitalism, the sharing economy and the gig economy. A broader socio-economic debate has developed regarding the inequality generated by the processes of categorising and hierarchizing the workforce, which assign workers to positions inside, outside or in between company boundaries (Granovetter and Tilly 1988). In short, we can speak of a new scenario that involves the combination of four general questions.

The first and most important refers to globalisation and the Global Value Chain (GVC) (Gereffi et al. 2005), in production, in the fragmentation of production processes and, therefore, in the growth of a huge freedom of use by firms of the labour factor. Companies can work with very different labour systems and use them selectively, and decide how to move production and what to move, without the slightest possibility of impact on the part of the unions. In the presence of a new type of internet-based company and of outsourcing that produces a chain of contracts and subcontracts, labour conditions within a company are extremely guided by relations with other national, multinational and foreign companies. Labour markets are influenced by the transnational migration of workers, which affects employment and wage levels.

The second is the question of technology, which has a decisive influence on the kinds of work and the organisation of labour and refers to the impact of digital technologies on productivity, subjectivity and quality of labour. Many labour activities and jobs are expected to disappear in the coming years (Frey and Osborne 2017; Arntz et al. 2016). Unions continue to control and defend a labour structure that is becoming obsolete, and have yet to enter the circuits of digital technologies.

The theory of a capitalist 'networked society' (Castells 2000) focuses on the spread of digital social networks across national borders and into almost all of society's subsystems. The global information economy is based on the extraordinary power of information and communication technologies to coordinate markets and a large number of social functions. Conflicts, inequalities and social exclusion are increasingly arising from the effects of network structures.

The third general question is job instability, which has spread to all sectors of activity, and even professional and managerial positions are being hit (Kalleberg 2009; Standing 2011). Since the 1990s, socio-economic debate has viewed a flexible labour market to be the organisational solution to enable companies to adapt more easily to market fluctuations, increasing their performance through a reduction in surplus labour. The different forms of instability have increased in all developed economies, as an unavoidable aspect of the new forms of business organisation that are typical of so-called slim, post-industrial capitalism. However, the different

sectors of the labour market have not all participated in these changes to the same extent.

A fourth question concerns the processes of structural exclusion of the workforce that, as a result of unequal and heterogeneous capitalist development across regions, sectors and occupational profiles, are happening in both advanced and underdeveloped societies, leading to an aggregate demand for formal employment that is unable to fully absorb all of the available labour supply. This has meant that the worldwide reduction in unemployment has not been accompanied by improvements in the quality of work (ILO 2019). So there is still a worrying issue of labour poverty, poor quality employment and persistent inequalities in the labour market. This process tends to be worse both in central and medium-developed countries as a result of technological changes and productive reconversion processes, the crisis of traditional forms of employment in local economies, the emergence of new businesses and illegal forms of unstable work, the renewed pressure generated by forced migration on an international level, the divergences in demographic transitions in terms of social inequality, and many other factors. Among the issues to highlight is the on-going divide between women and men in employment. These trends seem to have taken a new direction in the current context of globalisation, and national social security systems are unable to meet the welfare requirements arising from this situation, which is expressed by such persistent phenomena as forced inactivity, chronic unemployment and the many forms of poverty and marginalisation of labour.

In these main contexts of change, inequality is not always expressed the same way, because it involves different dimensions and may change over time. By focusing on an analysis of the way the labour market operates, we will particularly be putting ourselves in a paradigmatic position from which to observe social inequalities as an interplay of processes and dynamics from unequal positions of origin that are then reproduced, and others that are generated in this area, but also without denying the existence of the phenomena of upward occupational mobility.

Various theoretical perspectives deal with the representation of inequalities in modern society. From this perspective, we observe a shift from a concept based on 'inequality of conditions', which refers to the unequal distribution of income, wealth and material goods, to the idea of 'inequality of opportunities', which refers to the unequal distribution of life opportunities. In consequence, a representation of inequality involves discerning which groups or individuals are victims, in accordance with a model of social justice based more on equal opportunities (as a starting point) than on achieving equal conditions (as an arrival point). In contrast to the model that had characterised the phase of Fordist capitalism and its class structure, the new model supposes that individuals have the same opportunities to achieve certain social conditions (for example, through education), no matter how unequal they are (Dubet 2010). This is a means to legitimise the 'correct inequalities' derived from individual responsibilities, in a manner consistent with what Beck and Beck-Gernsheim (2001) called the 'individualisation' of modern societies, to show how institutions and social organisation reclassify the processes of exclusion and discrimination as a result of individual career paths and choices. Since the 1980s, both social theories and public discourse have gradually shifted from the structural

sources of inequalities, where the state and institutions play a key role in increasing or reducing socioeconomic disparities, to the inequality that arises out of individual responsibilities and is attributed to personal characteristics.

A second observable aspect is that the attention given to inequalities is focused more today on ‘income inequalities’ within developed western economies than on ‘social inequalities’. As Ramos Pinto (2016) pointed out, we are witnessing the predominance of the ‘income inequality’ approach, as represented so well by Piketty’s (2013) worthy demonstration of how the concentration of personal wealth has grown since 1980. It is somewhat narrow-minded to only view personal attributes as responsible for income mobility. From the point of view of social scientists, and from sociology in particular, the hegemony of economic methods, the reconstruction of patterns of income distribution and language, have limited a potentially broader understanding of inequalities.¹

The availability of international data series means it is possible to measure inequalities between countries. In Europe, we observe a dual effect of inequality. Although the process of European economic integration led to a reduction in inequalities between nations up to 2008, that convergence was partially interrupted by the effects of the economic and financial crisis and austerity policies. These have produced, as is well known, different consequences for the standard of living among Europeans, with an increase in poverty especially in the countries of southern Europe, compared to the Scandinavian countries and continental Europe. Therefore, there is significant inequality within the European Union on a territorial level.

However, together with this geographical divide, a second dimension of inequality is observed, based on the image of social differentiation in the European population, which is common and transversal to all national contexts. The socio-demographic characteristics that differentiate people (young or old, male or female, migrant or native, high or low level of education and skills) largely determine their life, career and income prospects.

The thesis of the ‘dualization of inequality’ (Heidenreich 2016), which refers in particular to the current situation in the European labour market, particularly highlights this dual level of geographical inequality and social stratification. While the inequalities between developed and emerging/developing economies have been reduced, internal social differentiation within countries and between regions, firms, sectors of activity, and even more between social groups and worker categories, is increasing, especially when considering the broader coordination and fragmentation of labour conditions and contracts. The inequalities related to belonging to one social group as opposed to another are clearly observable. Generational inequality

¹Tony Atkinson, who made an extraordinary contribution to the measurement of inequality and poverty, viewed income inequality from an unconventional perspective, namely the loss of social welfare associated to an unequal distribution of income. In other words, he considered the analysis of inequality as a basis for policies and suggested a series of concrete measures to reduce it. Atkinson’s (2015) ultimate goal was to transform economic analysis into political action, and hence he recommended new and ambitious policies in five areas: technology, employment, social security, capital distribution and taxes.

in career paths (effects of age-based discrimination), inequality in terms of income production and inequality in access to social protection are paradigmatic.

The main drivers of change (globalisation, technological progress and instability) cannot be separated from specific national factors, such as the choices made by governments regarding taxes and social protection. In fact, in all nations we can observe a variety of different ways to organise society and distribute income and opportunities, and which vary substantially in terms of the scope and efficiency to reduce inequality. For example, in such an emblematically egalitarian society as Sweden, a new tax policy and certain reforms of the welfare state are changing the distribution of income, benefitting the wealthier classes ahead of the rest of the population. In other words, “it costs less to be rich” (Pelling 2019).

The intensification of economic and social inequalities within labour markets, whose homogeneity was a prerogative of the Fordist system, implies the need to rethink the fundamental link between economic efficiency and social justice, which has been so crucial for European democracies that have widely reduced investments in welfare policies, diminishing the role of the state in mitigating risks.

The analysis of these issues from the perspective of labour market segmentation offers a paradigmatic vantage point from which to observe social inequalities, and led us to propose a methodological strategy for comparative analysis between countries that is open to the possibility of producing theoretical formulations that cross a society’s boundaries (Holt and Turner 1970). This comparative methodology is designed from the recognition of the existing duality, in macro-social units, between similar systems and different systems (Caïs 1997) with the aim to explain convergences and divergences of social processes in time and space. We do this in the text by first comparing, for contextual reasons, the position of a wide selection of European and Latin American countries in terms of a selection of labour market indicators, and, second, by examining the particular cases of Spain and Argentina through the formulation of an analysis method that is theoretically grounded on the perspective of segmentation and structural heterogeneity. From these analyses, we shall draw relevant conclusions to advance in this line of comparative international research.

3.2 Characterisation of European and Latin American Labour Markets

The defining features of the labour markets in both continents clearly reveal major differences in relation to certain structural aspects that have arisen out of contrasting levels of development, dynamics and particular economic-productive structures, as well as specific historical processes and institutionalisations of labour relations. We shall first present this contrast in the form of the existing socioeconomic distances between these countries, while also revealing the profiles that seem to form groups, thereby configuring a general descriptive typology.

We will consider, on the one hand, a selection of Latin American and European countries for which we have a set of comparable indicators based on the proposal produced by the International Labour Office and contained in the 17 *Key Indicators of the Labour Market -KLIM-* (ILO 2016). Specifically, the variables highlighted in Table 3.1 have been considered for an initial selection of 60 European and Latin American countries for which we have sufficient data.

To synthesise and structure all of the information on these 13 indicators for the 60 selected countries, a principal component analysis is applied in order to obtain the most important patterns that differentiate between countries, together with a cluster analysis to group the countries that most resemble each other in a general classification of labour markets.

Figure 3.1 shows the results obtained from the two main factorial axes that accumulate 68% of the variance explained. Factor 1 accumulates most of the variance, 51%, and reveals a latent dimension associated with a greater or lesser level of development. In this dimension, the negative polarity includes long hours of work, high levels of employment in the agricultural sector and a high proportion of young people who do not work or study, as well as low levels for the variables that define the other polarity of that main dimension, the positive one, namely high productivity, the importance of the service sector, high occupational status and educational levels, high salaries, high income and a framework of labour relations with a considerable presence of unions and coverage of bargaining. As shown in the graph, most of the most developed European countries are located towards the extreme of

Table 3.1 Selected key indicators of the labour market

No. of variable	KLIM number	KLIM Indicator
1	1	Employment-to-population ratio
2	2	Status in employment: employees
3	3	Employment by sector: agriculture and services
4	4	Employment by occupation: Managers, professionals and technics
5	5	Employment by education: advanced level
6	6	Hours of work
7	8	Unemployment rate
8	9	Labour underutilization
9	10	Youth not in employment, education or training (NEET rate).
10	12	Monthly earnings
11	14	Labour productivity
12	16	Labour dependency ratio
13	17	Industrial relations: trade union density

Source: International Labour Office, 2016

KLIM variables: 7. Informal employment, 11. Time-related underemployment, 13. Labour costs and 15. Employment by economic class, are not considered in the absence of data for many countries

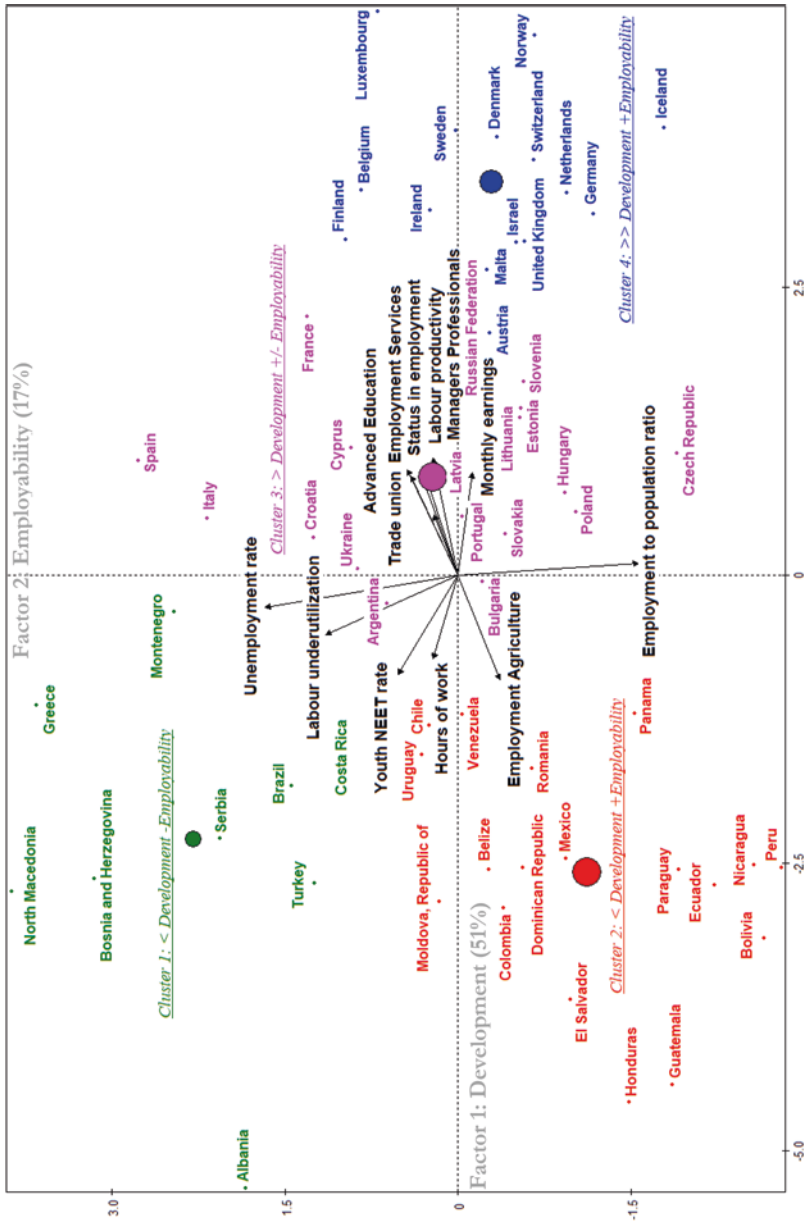


Fig. 3.1 Factorial graph of the social space of the European and Latin American labour market. Source: Own elaboration with KLIM indicators (International Labour Office 2016)

this latter polarity, while most but not all Latin American countries are located in the former.

Factor 2, with less important 17% of the variance explained, expresses a dimension associated with employability. It contrasts, on the one hand, high levels of activity or employment against high levels of unemployment and underutilisation of the workforce, on the other. This factor contributes to an internal differentiation of the features mentioned with regard to the first dimension, whereby most of the Latin American countries, which have higher levels of employability, are separated from the less developed European countries with low employability. Meanwhile, the most developed European countries, despite not differing so much in terms of this aspect of employability, do present certain differences between the more Mediterranean countries with lower employability levels and the Eastern countries with higher levels.

So, depending on these two factors, four types of countries are configured as shown by the colours in Fig. 3.1. Groups 1 and 2 share the features of less development and differ in terms of employability. Group 2 includes most Latin American countries, along with Romania, while Group 1 includes the least developed European countries with the lowest employability, along with Costa Rica and Brazil. Groups 3 and 4 are those with the highest levels of development, differing along a scale between those of the highest level in Group 4, essentially the countries of central and northern Europe, and the countries in Group 3, which are mostly from the south and east. In the latter case, in addition to the internal differences as mentioned in terms of employability, Argentina is also included on the outer limit of the group.

Spain and Argentina are the two countries that we have chosen for the comparison that we shall be examining in greater depth later on. These two countries are in an intermediate position in the development dimension, Spain being more highly placed, and with differences in the level of employability, which is higher in Argentina, due to the significant unemployment rates in the Mediterranean country and the relevance of the informal sector in the latter's economy, which benefits, albeit in instable conditions, the employability of the population. Meanwhile, both countries have different social models, as explained in the previous chapter. Spain is characterised by a mixed or semi-coordinated economy, while Argentina identifies with an informal uncoordinated economic system.

3.3 Inequality in the Labour Market from the Perspective of Segmentation

Our perspective in this chapter deals with the characteristics and conditions under which segmented labour markets operate in Europe and Latin America, in other words their effects in terms of flexibility and instability, i.e. job quality. Labour and employment segments are also viewed as the expression of the structure of social inequalities in the productive labour market, and the crystallisation of the social

logic that coordinates the time and work of the production and reproduction of life in a social and institutional context that models them. To present the social processes underlying the social inequalities that are generated in the labour market, our perspective combines two main theoretical approaches: the perspective of labour market segmentation and the perspective of structural heterogeneity.

First, to explain how the labour market works and the persistent labour inequalities that arise from it, we take the theoretical perspective of segmentation, whereby it is argued that the adjustment between supply and demand as a result of competitive allocation based on wage productivity, technological changes and trends in economic growth, is an insufficient explanatory mechanism to account for differences in wages and career paths, and the unequal positions that are generated in terms of labour conditions and job quality.

From this perspective, we stress the need to consider the institutional aspects that affect the labour market, the strategies of the parties involved taking into account the system of labour relations, with its regulatory framework and collective bargaining, different social and welfare policies, the social characteristics of the workforce, the sexual division of labour, as well as contextual elements of national production structures, of the global economy and of economic cycles, in a capitalist system dominated by neoliberal policies.

These different elements affect the configuration of common general dynamics regarding the division of labour and employment in terms of segmentation, beyond specific local or national configurations. Following Grimshaw et al. (2017) we propose the adoption of a multidimensional perspective involving factors that explain how the labour market works and how labour inequalities are generated. The revised proposal by Grimshaw et al. (2017), inspired by the intellectual contributions by Jill Rubery and the Cambridge school, as well as the International Working Party on Labour Market Segmentation, proposes a combination of three theoretical traditions to account for inequalities in work and employment: labour market segmentation, comparative institutionalism and the feminist socioeconomic approach. We now briefly account for each of these three aspects, in relation to which then we produce

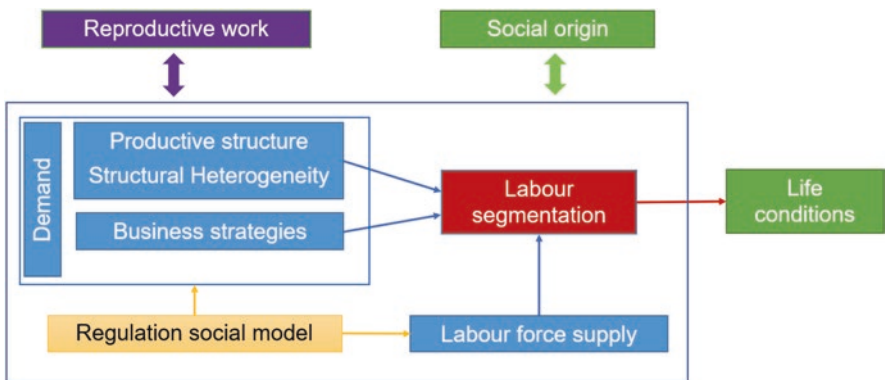


Fig. 3.2 Labour market segmentation. Analysis model

a specific model of analysis adapted to the study of employment as illustrated schematically in Fig. 3.2.

First, from the perspective of segmentation, and in contrast to the traditional postulates of neoclassical economics, the demand side must be viewed as fundamental. At the centre of the analysis are found the business strategies for the organisation of production and labour (especially flexibilisation, outsourcing and subcontracting) that, seeking to maximise profits by minimising costs and controlling the workforce, generate unequal labour conditions and opportunities for the salaried working population, and consequently for their career paths. However, inequalities are also reproduced and arise in interaction with the supply side. Certain social characteristics of workers hired both formally and informally, such as class, gender, age, immigrant origin or race, are unevenly distributed and overlapped according to the configuration of segmented jobs, thus favouring the ultimate goals of employers. Inequalities are thus constructed, creating hierarchical employment segments and career paths, of greater or lesser quality, filled by people from different social profiles, which the segmentationist literature has identified in terms of the duality of the labour market, differentiating between a primary and a secondary segment. This idea has been raised, in general terms, in numerous contributions since the 1970s, including among many others Doeringer and Piore (1971), Rubery (1978, 2005, 2007), Gordon et al. (1982), Wilkinson (1981), Craig et al. (1982), Recio (1991), Grimshaw and Rubery (2005), Gibert (2011) and López-Roldán and Fachelli (2019).

Secondly, from comparative institutionalist theory, the societal effect derived from the role of institutions and the power relations between stakeholders is considered a fundamental issue for explaining the configuration and workings of the labour market. From this perspective, aside from the logic of conflict between capital and labour, we also need to consider the rules and standards that sustain education and vocational training systems, the welfare state and social protection systems, gender relations, organisation of families and homes, labour relations, behaviour in the workplace and business cultures, corporate governance and innovation systems. The interaction between these elements structures the observable inequalities in labour and employment. In this regard, we may speak of varieties of capitalism. In particular, the regulatory regime of each nation state establishes a specific framework for modulating the labour market and its effects in terms of labour inequalities, whereby it accompanies and reinforces, with greater or lesser emphasis depending on the employment model and the policies applied, inequalities and the segmentation of the labour market, heightening the risk of exclusion of some of the weakest workers, generating far from decent job conditions and even threatening the quality of jobs for the highest ranked groups. Hence, the contextual institutional elements offer specific explanations for the phenomenon of segmentation, avoiding overly simplistic universal theorisations of a phenomenon that can nevertheless be considered widespread across capitalist economies. Studies along such lines include those by Esping-Andersen (2000), Hall and Soskice (2001), Menz (2008), Vaughan-Whitehead (2015), Burrioni (2016), Del Pino and Rubio (2016) and Doellgast et al. (2018). Meanwhile, segmentation is dynamically expressed in terms of mobility

processes and career paths that also express processes of labour inequality (Miguélez and López-Roldán 2014; Verd and López-Andreu 2016; Martín Artiles et al. 2018).

Thirdly, the tradition of feminist socioeconomics has focused the study of segmentation processes in terms of gender inequality, broadening the perspective and breaking away from androcentric views focused on the productive sphere. From a broad vision of the concept of work, taking into account the interaction between the productive and reproductive spheres, and revealing the segregation and discrimination of women in terms of labour (Humphries and Rubery 1984, Bettio and Verashchagina 2009), the segmentation model has a strong capacity for explaining the mechanisms that underlie the generation of labour and social inequalities. The inequalities observed in work and employment between men and women are explained by the confluence of different elements: the sexual division of labour, the persistence of a social and cultural context of patriarchal dominance, the reproduction of the tendency among employers to devalue and segregate female labour, or the interconnections between the welfare and care systems, the regulation of labour and the way the labour market functions (Bettio and Plantenga 2004; Simonazzi 2009), as has been made apparent for Spain (Carrasquer et al. 2015). These developments serve to explain the different career paths of men and women (Borrás et al. 2012; Torns et al. 2013; Carrasquer and Amaral 2019), as well as the different gender impacts of the 'Great Recession' (Rubery 2014; González Gago and Segales Kirzner 2014; Kushi and McManus 2018; Sánchez-Mira and O'Reilly 2018).

These three core areas of segmentalist theory can also be framed in an analysis of the patterns and trends in changes in the global economy, as well as in the specific context of a territory's productive structure and level of economic development.

It is particularly in this regard that we contemplate the perspective of structural heterogeneity. This approach was introduced by Prebisch (1949) and formalised in the 1970s by Pinto (1970) and later PREALC (1978), and is still in force today in the conceptual framework of CEPAL (2012). This approach takes the perspective of historical structuralism to understand the economic and social workings of Latin American countries. According to this theory, in capitalist economies subject to an unequal, combined and dependent development model (the dominant one in Latin America), modern, high productivity production sectors, integrated into world markets, with similar labour organisations and relations to those of the most developed countries coexist alongside very low productivity production sectors that are mainly focused on the domestic market, linked to social subsistence needs and involving informal economic units or activities. The existence of an absolute surplus of labour and labour segmentation would be a consequence of these productive constraints whose corollary would be the segmentation of jobs in the labour market into subsistence activities typical of the secondary segment and formal jobs in the formal private and public sectors typical of the primary segment, and hence inequalities in living conditions that are persistent over time (Salvia 2012).

This social dynamic is expressed in the mechanisms for the selection, opening or closing of opportunities through economic agents and regulatory institutions at the level of each market. Labour inequality is structured around certain groups (young people, women, migrants, unskilled, etc.), as well as economic-occupational sectors

and segments that are affected by conditions of structural heterogeneity: non-professional self-employed workers, informal micro-units, social cooperatives, destitute jobs, etc. So, one of the sources of the inequalities that arise in the labour market is the incidence of a production structure that segments positions and, in turn, is the cause of its structural effects on different processes and dimensions that shape unequal living conditions.

Given certain initial conditions for social inequality and reproduction, particularly in the sexual division of productive and reproductive labour, the dynamics of the labour market's interaction with these initial conditions are expressed in its segmentation as a result of the interaction of four central elements: the socio-economic productive structure, business strategies for production and organisation of labour, the institutional structure that regulates social relations in terms of labour that shape a certain social model of employment and the social characteristics of the workforce.

We understand that to account for inequalities in the labour market, it is essential to verify the existence of a production structure that determines the characteristics of employment and the structure of the labour market. This socio-historically rooted factor is associated to productive forces and regulatory institutions, but implies accounting for a mechanism via which the segmentation of the labour market is configured, and which both structural heterogeneity theory in Latin America and non-orthodox theories on labour market segmentation have expressed. From this theoretical perspective, our general hypothesis, which we shall shortly be analysing for the comparative cases of Spain and Argentina, will establish, on the one hand, that there is no single market that adjusts supply and demand but that different hierarchical segments are configured depending on job quality and, on the other, in terms of employment, that we expect to find a similar general structure of the labour markets in Spain and Argentina.

3.4 Comparative Analysis of Labour Market Segmentation in Spain and Argentina

If we analyse both countries in terms of the social model developed in Chap. 2, where the labour relations model and the welfare model were interrelated as regulatory institutions to correct social inequalities from the pre-distributive or post-distributive point of view, we find that Spain and Argentina have two different models. Spain's is that of a mixed or semi-coordinated economy, characteristic of Mediterranean countries, while Argentina's is typical of Latin America, namely an informal uncoordinated economy. We now describe some of these specific features of the context of each country.

3.4.1 The Context of the Spanish Labour Market

The Spanish labour market has historically been characterised by large fluctuations in the volume of employment (Banyuls and Recio 2017), plus high levels of unemployment and temporary employment and hence labour segmentation, generating the social phenomenon of flexible employment (Prieto 2002; Miguélez 2004). Public employment policies have been implemented in a context of debate over the supposed rigidity of the labour market in terms of recruitment and the negotiation of wages. However, statistics show that it is actually a country that has maintained Europe's highest levels of atypical employment over time, due to the specificity of its employment model (Bosch et al. 2009). There is no ignoring the persistence of a production structure and certain business strategies that have generated a labour market with high rates of temporary work and unemployment (Fina and Toharia 1987; Banyuls and Recio 2017).

The Spanish employment model is identified as Mediterranean neoliberal (Banyuls et al. 2009) where different characteristics are combined within a socio-economic model resulting from rapid and profound changes in which structures and dynamics inherited from the dictatorship converge with major transformations that have been implanted in times of democracy. This model is the result of the convergence of various defining characteristics: a service productive structure with a predominance of small and medium enterprises, with particularly intensive use of labour, low qualifications and relatively low productivity; a production system that is isolated from the education system; Taylorist business practices, with cost-cutting strategies and external flexibilisation of labour management with scant interest in training; an economy that includes a relatively large amount of undeclared labour; a low number of large high technology companies; and union action mainly being limited to large companies and unable to operate in the broad network of small companies, even though the unions are well recognised and institutionally legitimated. All of this has led to and maintained high segmentation of the labour market and high levels of unemployment.

To this is added a weak welfare system, where, although we should also recognise that the state has improved its services and benefits since the establishment of democracy, the fiscal system and policies that restrict the public sector have yet to fully resolve, in comparison to the rest of Europe, the inequalities that this employment model generates and which has to be compensated by generous family support, with the effects that this entails when it comes to ending gender inequalities if a fair social model is to be defended in terms of the distribution of everyday time and activities.

In this power struggle, we should first note that Spain's production structure has always been characterised by the importance of labour-intensive low productivity activities. During modernisation, a cumulative process has occurred whereby the service sector has expanded at the expense of agriculture and industry on the basis of business policies promoting low-cost labour, flexible labour management and control of the workforce. Hence the growth in productivity has generally been very

moderate. The predominance of a broad network of small and medium enterprises has reinforced this strategy and largely explains the weak competitive position of many activities with little added value. Large companies, meanwhile, are concentrated in sectors such as banking, construction, tourism and public services, generating limited surpluses, little technological innovation and a weak position in the international economy.

Second, in times of democracy, labour relations have involved the major institutionalisation of trade unions and business organisations. This can be identified with a model that Hall and Soskice (2001), when discussing varieties of capitalism, call coordinated economies, where neo-corporatist structures to institutionalise social consensus exist alongside collective bargaining. In Spain, this neo-corporatism would be of a medium or mixed level, where tripartite social dialogue has typically been produced via external institutional mechanisms, focused on issues related to the labour market and social policy, adopting a strong distributive nature and having little impact on the formulation of general economic policies, and acting in an intermittent manner depending on the economic cycle and the policies of the party in power (Molina and Miguélez 2016). In the particular case of trade unions, general bargaining is legitimised, and unions have participated in different tripartite agreements throughout democracy, but they are too weak to guarantee compliance with these agreements, since their presence in small and medium enterprises is so limited. This situation dualises trade union action and reinforces the segmentation process, since the unions are strong in large companies, where jobs are predominantly of good quality, and weak in small companies, which are the ones that experience the effects of the different policies that are leading to segmentation (Alòs-Moner 2008).

Thirdly, we note that since the transition to democracy numerous labour reforms have sought to regulate the Spanish labour market. There was a major turning point in 1984 with the act that abolished the ‘causality principle’ that was typically included in temporary contracts. Since then, successive reforms have introduced measures to deregulate and flexibilise contracts and these have helped to bring the costs of temporary and indefinite contracts more in line, while also maintaining a high proportion of poor quality work without changing the preference among employers for temporary contracts (Toharia 2011). The general aim of the process has been to reduce labour costs, and this has discouraged innovation and qualified jobs, leading to stronger labour market segmentation. In addition to these partial reforms, there have also been marginal attempts to weaken the capacity for collective bargaining or limit unemployment benefits. This has especially been the case since the 2012 reform that decentralised and prioritised bargaining at the company level, giving employers a greater margin for discretion when differentiating labour conditions and inequalities (Cebrián et al. 2013; Martín Artiles et al. 2017; Alòs-Moner et al. 2017). The tension between the implementation of more liberal policies and resistance to the same has tipped the scales more towards neoliberal capitalism in line with international trends.

This tension has also been expressed in the construction of a welfare state that is limited by neoliberal policies aimed at reducing the role of the state in the economy

and society. However, the Spanish Mediterranean regime, rooted in its cultural patterns, with the indispensable provider role of families and ever-persistent gender divisions, has expanded considerably, although its social protection function has suffered the contradictions of that tension with cuts in public spending, a good part of which is concentrated on unemployment benefits and subsidies, with little investment in active employment and training policies, which are below the European average. Early school dropout, the limited weight of vocational training and high levels of underemployment of young people with a high level of education continue to be the touchstones of Spanish society. Meanwhile, attempts to reduce gender inequalities by balancing domestic and care work with paid work have been a slow process, especially in the private sector, although the highly widespread incorporation of women into the labour market means that the country is irreversibly headed towards increasing reduction of the gender divide. The effects that this situation will have on the future of the pension system, given the decrease in contributions and demographic trends, are another matter entirely.

In summary, we could speak of diverse and contradictory dynamics in a universal welfare system that is characterised, in relation to European levels, as being of low quality and low cost (Martín-Artilés 2008; Banyuls et al. 2009). The last 40 years have produced profound and rapid changes that have led to the modernisation of the country, but it is one where the structural dynamics and problems that reproduce social inequalities persist. It is a system whose weaknesses re-emerge and worsen in crisis situations such as the Great Recession of 2008, and the current phase of slow recovery has failed to get the country back to its pre-crisis levels.

3.4.2 The Context of the Argentinian Labour Market

In the last five decades, Argentinian society has experienced major on-going economic-financial instabilities, which have had regressive effects on the labour market, both in terms of job creation and the evolution of real wages and the amount of informal labour, among other aspects (Salvia et al. 2018). This labour market behaviour was not unrelated to the performance of the production structure, the macro-economy and labour institutions. The latter, in turn, has proven to be highly endogenous to changes in macroeconomic models and political-economic cycles and conjunctures (Bertranou and Casanova 2015).

It is in this context that we should understand the particular increase in poverty and social inequality in recent decades in a country that has a high potential for production and major competitive advantages for the production of primary goods on an international level. The structural heterogeneity of the labour market, its increasing segmentation and the formation of a large sector of surplus population taking refuge in informal activities (Bertranou et al. 2013), are persistent underlying factors of the regime of accumulation in Argentina. These are still distinctive aspects of the way the labour market works in the country, even despite the recovery and

formalisation of employment in each cycle of expansion (Salvia 2014; Salvia and Rubio 2019; Poy 2017).

In the last 30 years of Argentinian history, the labour market has acted in different and contrasting ways. In the late 1990s, not only did unemployment rise, but job quality deteriorated too, as a result of the increase in informal labour and unstable employment in the formal segment. Following the socioeconomic crisis of the start of the century (2001–2002), labour market indicators improved, unemployment fell and there was an increase in formal paid employment. However, from 2009, in a context of greater economic volatility, these improvements tended to stagnate, or even drop off, particularly following the crises of 2014–2016–2018, and partially regressive reforms to labour policies from 2016 onwards.

In the 1990s, in a context of structural reforms and economic liberalisation across almost the entire region, the demand for employment in the Argentine labour market was extremely un-dynamic, with significant increases in the levels of unemployment and unstable work. In this context, major reforms were made to labour regulations under the premise that greater contractual flexibility would boost the demand for employment, reduce labour costs and make businesses more competitive (Heckman and Pagés 2005; Marshall 2004; Neffa 2008). In terms of the regulation of labour, together with the creation of a limited unemployment insurance, the new regulations introduced fixed-term contracts, brought down severance costs and made them more flexible, endorsed unpaid forms of labour, promoted the decentralisation of collective bargaining, and also brought about changes in the labour organisation of companies without union mediation, and even sought to reduce contributions by employers to social security in order to encourage more flexible jobs. At the same time, a series of social employment and occupational training programmes were instituted for the unemployed in high-risk situations, to a large extent to reduce the social conflict generated by the restructure, closure and/or privatisation of state-owned companies (Salvia 2012).

In the 2000s, this concept was abandoned following the political crisis of the macroeconomic model in force during the period of neoliberal reforms. In the wake of the 2001–2002 crisis, in a context of strong economic growth and rapid recovery of the demand for employment, economic and labour policies aimed at creating quality jobs were put back on the public policy agenda. In a relatively short time, many of the reforms aimed at flexibilization that had been introduced in the previous decade were reversed. For example, flexible contracts were repealed, institutions linked to the setting of wages were revitalised and active policies for the protection of formal jobs were promoted (MTEySS 2009). The latter included measures to make it easier for workers to formally register, the recovery of state-managed labour inspections, heavier sanctions on companies that committed labour fraud, and special tax regulations to promote the registration of labour among small and medium enterprises, as well as the creation of special regimes for registering female workers in private homes and agricultural labourers (Tomada 2014; Panigo and Neffa 2009). As for wage policy, on the one hand, there was a revival of sector-level collective bargaining, which led to a general recovery of wage levels, together with a fairer wage structure (Palomino and Trajtemberg 2007; Lanari 2015), and on

the other there was the introduction of the *Salario Mínimo, Vital y Móvil* (Minimum, Vital and Mobile Salary—SMVM) as a central instrument of income policy, giving powers to a tripartite collective body (Panigo and Neffa 2009).

But following the exhaustion of the economic model by the end of its first decade, coupled with the international economic crisis of 2009, labour policies had to be reappraised, primarily to safeguard jobs against the risks of economic openness and its effects on the unemployment rate. In this new setting, among other measures, the government implemented mechanisms to avoid collective redundancies, and expanded direct subsidies to cover the wages of affected companies. It also re-introduced vocational programmes aimed at unemployed people in the most vulnerable social segments in order to provide them with a minimum income.

In general, post-structural reform policies had positive effects on the labour market and improved workers' living conditions. However, its scope was still limited to the formal productive sectors, which, despite the economic growth and measures to promote formally paid jobs, continued to represent only 50% of workers and less than 70% of salaried employees. For them, the regulatory framework limits unstable labour relations, provides full coverage in terms of social security, health and indirect wages, and guarantees collective bargaining of wages; i.e. the degree of labour protection received by these workers is relatively satisfactory. However, other workers in the Argentine labour market see none of these benefits. Whether they are employees of small businesses, freelancers or social cooperatives, workers in the informal sector get absolutely no labour protection or social security. The only help they get from the Argentine government comes via conditioned income programs, which complement the very low wages that they can earn in informal labour markets.

Undoubtedly, macroeconomic and sector-level policies are an important part in the process of creating and formalising jobs in the Argentine labour market. However, labour institutions and policies also play an important role in the performance of the labour market, although the former are still insufficient to achieve full productive employment for the existing supply of labour, while the latter operate efficiently, but only with regard to a partial and relatively privileged segment of the workforce. Therefore, informal labour is still the main problem in terms of job quality given the limited number of atypical forms of employment within the formal segment (Salvia 2012; Bertranou et al. 2013). Both economic growth and changes to the production structure are fundamental elements for fostering quality jobs in Argentina.

This coincides with a period in which, as a result of factors related to the economy or not, growth in levels of activity has decreased and become more volatile and heterogeneous between sectors. Likewise, despite some changes to the production structure, the sectors that are able to generate high quality jobs currently have very little dragging, while foreign restrictions (as at other moments of Argentine history) are a major limitation on the growth of sectors with the capacity to generate jobs in the domestic market (Coatz et al. 2015; De Miguel and Woyecheszen 2015).

3.4.3 *Analysis Model and Methodology*

In the comparative analysis of Spain and Argentina, from perspective of labour market segmentation and structural heterogeneity theory, we establish the general hypothesis that, on the one hand, there is no single market that adjusts supply and demand, but that different and hierarchized segments are configured, which depending on job quality are placed in two main groups: the primary segment and the secondary segment, where people are positioned unequally according to job conditions and such social characteristics as gender, age, immigrant origin and educational, as a result of the interaction between factors of supply and demand and a regulatory social model. On the other hand, we expect to find a similar structuring of labour markets in Spain and Argentina in terms of employment, in crystallization of labour inequalities resulting from structural and institutional processes that act as specific mechanisms in each social model, but which lead to similar general results in terms of the structure of inequalities in the labour market.

To test our hypothesis, we designed an analysis with a quantitative methodology that we present below. First of all, it is a static comparative study of the two countries with data for the year 2016 for the entire wage-earning population (72% of the employed population for Argentina and 84% for Spain). Labour survey data is used to examine the labour market from an employment perspective, i.e. contract conditions and the quality thereof, and we do not specifically capture the characteristics of labour from the demand side contextualised in an organisation of production and labour, with effective functions and qualifications that are observable in the micro-social realities of jobs. We thus obtain a macro-social snapshot of an aggregate structuring of the segmentation of employment. This is a measure of the phenomenon that is expressed in terms of the results or effects of segmentation processes. Other factors are involved, such as institutional aspects, sector patterns, the framework of labour relations, the link with the reproductive sphere and other meso-social matters, as we explained in our theoretical perspective, but these are not explicitly measured here. Those elements of our model are captured partially or indirectly.

Our labour segmentation model and its operationalisation are conditioned by the information available in the sources and by the need for comparable data between the two countries. Following the proposal formulated in López-Roldán (1996a) and López-Roldán and Fachelli (2019) indicators are distinguished from the points of view of both demand and supply, with a set of 8 dimensions that give rise to a total of 13 variables (Table 3.2). The dimensions that define the demand side are: security, as a dimension of job stability and instability; qualification, which differentiates formal occupational levels or professional categories;² the wage dimension, as an indicator of job quality; and, finally, various characteristics of companies that

²As an indicator of skills, we use the International Standard Classification of Occupations, which hierarchically measures similar characteristics of the tasks involved in jobs and the training (competences) required to perform them, together with the performance of supervisory functions.

Table 3.2 Dimensions and indicators of the employment segmentation model

Dimension	Indicators/variables
Labour market demand	
1. Security	Type of contract and duration: <i>Open-ended, >6 months, <6 months, informal</i> Type of workday: <i>full-time, part-time</i> Seniority in the company: <i>aggregation in months-years</i>
2. Qualification	Occupation: <i>Managers and professionals, technicians and administrative staff, skilled workers, unskilled workers</i> Supervision: <i>Management, middle management, person in charge, employee</i>
3. Salary	Salary deciles: <i>Decile 1 to Decile 10</i>
4. Characterization of the company	Sector: <i>Primary, 3 industries, construction, retail, transportation-communications, financial-professional, public administration, other services</i> Ownership of the company: <i>Public, private</i> Size: <i><5, 6–10, 11–49, 50–250, >250 workers</i>
Labour market supply	
5. Gender	Sex: <i>Male, Female</i>
6. Age	Age: <i>16–24, 25–29, 30–34, 35–39, 40–44, 45–49, 50–54, 55–59, >59 years</i>
7. Immigration	Nationality: <i>National, Foreign</i>
8. Education	Educational level: <i>Primary, Secondary, University</i>

For some variables, the categorization will differ slightly depending on the source of information in each country.

contextualise the framework of social and organisational relations in which jobs are offered: company size, sector and ownership. From the supply side, four dimensions of the workforce are considered: gender, age, immigration and education.

The data for Spain is taken from the *Encuesta de Población Activa* (Active Population Survey) published by the *Instituto Nacional de Estadística* (INE), which equates to the European Union's EU-LFS, considering a total of 30,037 wage-earning workers. For Argentina we use the fourth quarter of the *Encuesta Permanente de Hogares* (Permanent Survey of Homes) published by the *Instituto Nacional de Estadística y Censos* (INDEC), with a sample of 17,798 members of the wage-earning population.

From the methodological point of view we pursue a dual objective. On the one hand, we seek to compare the factors that structure inequalities in the labour markets of Spain and Argentina and to determine the degree of similarity or dissimilarity of labour segmentation between the two countries. On the other, we seek to obtain a variable for the segmentation of the labour market in each country and thus compare the degree of similarity or dissimilarity between the labour segments that emerge from the analysis. Formally, the idea is to obtain a typology of employment segments defined in the form of 13 original variables and 74 associated categories. To do this, we apply a typology-building methodology that we call structural and articulated (López-Roldán 1996b) which principally involves sequentially combining two multivariable analysis techniques: multiple correspondence factor analysis,

to analyse the relationship between the variables and synthesise them in a reduced set of factors of differentiation that define the factors that structure the labour market, and classification analysis, to group individuals into a number of employment groups or segments, the most internally homogeneous and the most heterogeneous from each other. In this process, the main factors obtained, synthetic and measured on a quantitative scale, are then used as classification criteria in the cluster analysis where a mixed method has been applied that combines Ward's method of ascending hierarchical clustering with an optimisation of the initial classification applying the mobile centres method (Lebart et al. 1997; López-Roldán and Fachelli 2015).

3.4.4 Results of Segmentation Analysis in Spain and Argentina

Table 3.4 in the Appendix shows the frequencies of the variables used in the analysis. The first dimension, that of job security, first considers the type of contract and its duration, where it is revealed that Spain has 15 percentile points more wage-earners with indefinite jobs than Argentina. This difference is explained, in particular, by distinguishing feature of the Argentine labour market, namely the existence of a large informal labour sector of as much as 24% of paid employment, hence a situation of generally unstable work and the absence of recognised rights. This lack of contracts together with 15% temporary jobs implies a higher level of contractual insecurity that this indicator reflects: 39% in contrast to the 24% for Spain.

In this first dimension we also consider seniority in the company, whereby being in the same job for between 0 and 1 year is similar (17%) in both countries. Argentina generally has a shorter-serving workforce, which is partly a product of a demographic effect, as it has a younger population than that of Spain, where 48% of workers have been in the same job for 5 years. In Spain, the proportion of the working population that has been in the same job for 4 years amounts to 70%. Thirdly, we considered a standard employment indicator, from the stability dimension, to be the type of working day differentiating between full and part time. In Spain, the percentage of full-time employment is somewhat higher, 83%, while in Argentina it is 78%.

As for the second qualification dimension, the data shows that the occupational pyramid is more biased towards the top in Spain and towards the bottom in Argentina, with greater polarisation in the case of Spain. Executives, specialists and administrators amount to 44% in Spain, while in Argentina the value is 26%. Meanwhile, skilled workers (with operational qualifications) amount to almost 50% in Argentina while the figure for Spain is 41%, in contrast to the greater weight in Argentina of unqualified salaried work: 27% as opposed to 14% in Spain. These profiles are complemented by an additional indicator in the qualification dimension that considers responsibilities for supervising other people's work. Spain has a greater degree of supervision (15%) than Argentina (5%).

On the matter of income, we have the aggregate information in deciles for both countries.

For the dimension that characterises the firms in which the labour relationships occur, we collect various variables that reflect the organisational and sector-level contexts of jobs. First, the distribution by activity sectors shows one of the most important differences between the two countries, which occurs in the dimension of employment by public administration. This is the largest employment subsector in both countries, but in Argentina it is almost 6 percentile points higher. On the contrary, the trade and financial-professional sectors are notably more important in Spain than in Argentina, being almost twice as big in the former. Industrial subsectors also bear greater weight in Spain, 16% compared to 13% in Argentina, as do other services. However, the construction sector is somewhat more important in the Latin American country.³ As a result of this sector-level distribution, the dimension of public ownership of companies is the same in both countries, grouping a quarter of employment. As for company size, according to the indicator of the number of workers, the distributions are fairly similar, with a greater weight of smaller companies with 5 workers or fewer, which concentrate almost 27% of the paid labour in Argentina and 18% in Spain. For the other percentages, there are no major differences between the two countries.

In relation to the variables that describe the offer of employment, there are several differences between the two countries. First, the gender variable in Spain is balanced between male and female wage-earners, close to 50% each, while in Argentina women represent 45% of the total salaried population.

The age distribution data reveals an Argentine labour market with a greater percentage in the youngest group compared to the late entry by Spaniards in the labour market. 13% of the Argentine workforce is in the 16–24 year age group, as opposed to just 5% in Spain. The case is the same in the two next highest age brackets, but from the age of 35 it is Spain that has the highest percentages, reflecting the greater ageing in its wage-earning population pyramid, although in the oldest age group the numbers level off or even revert slightly back the other way.

The nationality indicator reveals another feature of the labour supply, with a greater weight of foreign labour in Spain, 8% versus just over 5% in Argentina.

Finally, the information on levels of education shows the unequal distribution between both countries: a more expansive education system in Spain has led to a low percentage of the population only having a primary education levels and a higher percentage that reached the highest levels. Almost 31% of the wage-earning population has a university degree, while the value is just 14% in Argentina, with a notably high 33% of the working population only having a primary education.

It can thus be concluded that there are major differences between the Spanish and Argentinian wage-earning labour markets, with higher qualifications and more stable jobs in Spain than in Argentina. The question we now ask is how this set of indicators can be used to present factors of inequality in the labour market, and to

³Note that the Argentine EPH primarily collects information from the urban population and underestimates the weight of the primary sector, so its introduction causes the commented values to vary somewhat.

show which employment segments they occur in and the extent to which the two countries are similar.

3.4.4.1 Labour Segmentation Factors

In a first analysis we look to obtain the main factors of differentiation of the salaried workforce based on the interaction between the set of 13 chosen variables to express the dynamics of labour segmentation. These synthetic factors are obtained by combining the original categorical variables through application of a multiple correspondence factor analysis, with which we can parsimoniously reduce the data gathered by the initial multidimensional information on the active categories of the 13 variables that together define job characteristics, both from the points of view of demand and supply, to a few significant factors. As a result of our analysis, we find two main factors in both countries that explain 86% of the variance in the case of Spain and 88% in the case of Argentina. These two factors, or synthetic and significant dimensions of the information, express a similar general pattern of behaviour in both countries that we shall now comment on (see Fig. 3.3).

The first main factor accumulates most of the explanatory power of the information contained in the original variables: 71% in Spain and 72% in Argentina, and is a fundamental axis of labour segmentation for both countries with coinciding features relating to the opposition between, on the one hand, the profile of atypical poor quality jobs, i.e. the most insecure due to hiring on a short-term temporary basis, those based on informal labour relations, those worked part-time, involving young male and female workers who have been working for the least time in the company doing the lowest qualified jobs, without supervisory responsibilities and with low levels of education. These are therefore the jobs with the lowest wage levels in the labour market, typical of small, privately owned businesses, especially in the other services, construction and commerce sectors (also in the primary sector in the case of Spain). These jobs are found at the most unstable and devalued polarity of the labour market, where part of the native, youngest and least qualified population is positioned, but above all workers of immigrant origin.

In contrast, there are secure, good quality jobs, typified by indefinite contracts, full-time work and employees that have served the company for the longest. These jobs require medium and high level skills, and therefore include supervisory responsibilities and medium to high levels of education. Consequently, these are jobs with the highest salary levels. They mainly occur in medium and large companies, especially in the public sector, but also in industry and some services: public administration, education, health and transport-community. This is also the case with the financial and professional subsector in Argentina, but less so for Spain as it is at the centre of the graph attracted by the presence of features of the most insecure extreme. In turn, the labour stability that emerges from this polarity of the first dimension corresponds to the oldest segment of the workforce in both countries, as well as a predominance of the native population.

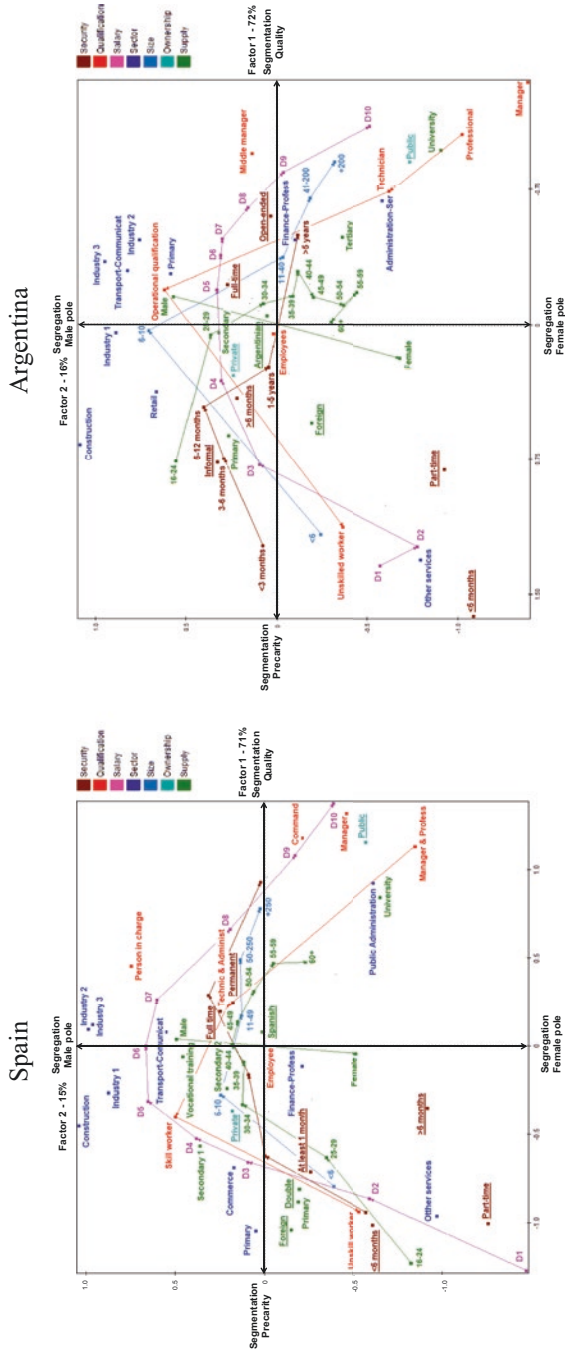


Fig. 3.3 The social space of labour market segmentation in Spain and Argentina. Source: Authors, based on EU-LFS 2016 and EPH 2016

We thus conclude the configuration of a principal factor of differentiation in the salaried population that we can identify as labour segmentation by contrasting a primary segment with quality, secure, qualified, better paid jobs against a secondary segment that is characterised by insecurity, low qualifications, poor pay and a greater lack of protection.

A second factor, with a much lower weight, of 15% in the case of Spain and 16% for Argentina, expands on the first factor to differentiate its intermediate positions from its extremes. This contraposition is shown in the factorial graph by drawing a parabolic point cloud to identify the well-known Guttman effect of correspondence analysis. At one end of the factorial axis we find the intermediate occupational levels of skilled or operational workers, which are particularly characteristic of private industrial, construction and transport industries. These features are shared by both countries, the difference being that in the Spanish case these are stable jobs while in Argentina they can also be informal.

At the other end of the second factorial axis, separate in the first, but occupying the same space from the perspective of the second, for both countries we find both safe and insecure jobs, high and low skill levels, high and low pay, public sector and other services. The confluence in this polarity of the second factor can be explained by its association with the gender variable, which is neutral in the first factor but in this second case expresses labour segregation: at the intermediate pole we mainly find men, with women at the extremes of the poles, i.e. polarised as much at the lowest occupational levels as they are the highest. There is also a notable association between full-time men and part-time women. The particularity of the Spanish case is that the contrast between medium and extreme levels coincides with the age distribution, with a contrast between intermediate ages and the younger and older groups. This contrast is not as clear for Argentina, and where younger and medium ages tend to be associated with the intermediate pole and older people are at the extremes. This opposition between intermediate levels and the remainder also relates to a specific segmentation factor, since it plays a part in establishing the distinction between the profile of the lower primary segment and the rest, and especially against the upper primary segment.

In summary, by means of the factor analysis we conclude that unequal positions are structured in the wage-earning labour market based on two main factors of labour differentiation, both in Spain and Argentina, and which we identify as a first principal axis of segmentation and a secondary one of segregation. We should stress that, using the same labour segmentation indicators in both countries, from the particularity of each social formation, situations of labour inequality arise that coincide in both content and magnitude.

We now use these results to consider how these factors of labour inequality are expressed in terms of groups of male and female workers who share the same profiles in this context, i.e. what job types or segments are configured. To do so, we apply a cluster analysis.

3.4.4.2 Types of Labour Segmentation

Taking as our classification criteria the two segmentation and segregation factors that emerge from the dimensionalización analysis, we proceed by performing a classification analysis to obtain a typology of labour segments for Spain and Argentina, which we do with four types of labour market stratification and which, as we shall see, enables us to typify social inequalities in the labour market both in dual terms and in the form of a triad of segments. Figure 3.4 shows the distribution of individuals by the typological groups to which they belong in each country. We shall now summarise their main features in the emerging hierarchical order from the lower to the upper segment.

For Spain, the first type clusters 15% of the cases with the most extreme secondary segment profile that we have called ‘lower’. It shares with the following type the low skill levels and job insecurity, and its defining feature is the high concentration of women (78% of the type) with the lowest level of income (59% are in decile 1), due in particular to the fact that 80% of the group work part-time. These are feminised jobs in small private companies, especially other services and financial-professional. They are generally filled by young people with a low level of education and a high presence of immigrants (17%).

The second type, with 24% of all wage-earners, also predominantly features unstable, low-skilled jobs in small private companies, typical of commerce, other services, construction, financial-professional and the primary sector, which is also where the lowest wage levels are, although more tenuously than in the previous case, distributed between deciles 1 to 5. These are labour relations without seniority in the company, filled by young people with low or secondary levels of education and with a greater presence of women (53%) and foreigners (15%).

The third type, with 33% of salaried workers, covers the characteristic jobs of the lower primary segment, i.e. stable full-time jobs filled by skilled workers and technical-administrative staff in private companies mainly in the industry, construction, commerce and transport-communications sectors, who have worked for some time for their medium or large companies. They receive medium income levels, between deciles 4 and 8. These places are mainly filled by males (75%) with secondary and vocational education levels, between 30 and 54 years of age, with a low presence of immigrants.

Finally, the fourth type represents 28% of wage-earners and is classed as the upper primary segment. It offers the best working conditions: security, high skills, supervisory responsibilities, high salary levels and seniority in the company. These are especially characteristic of large companies and public administration (70%). These wage earners tend to be the oldest native people, aged 45 years and above, with a greater presence of women (57%) and high education levels (75% have university degrees).

For Argentina, the first type represents 14% of paid work, and as with Spain typically involves unstable jobs with the lowest income. As the lower secondary segment, it brings together low-skilled jobs in the other services sector in small private companies that are filled by women (90%), in part-time (70%), temporary (59%) or

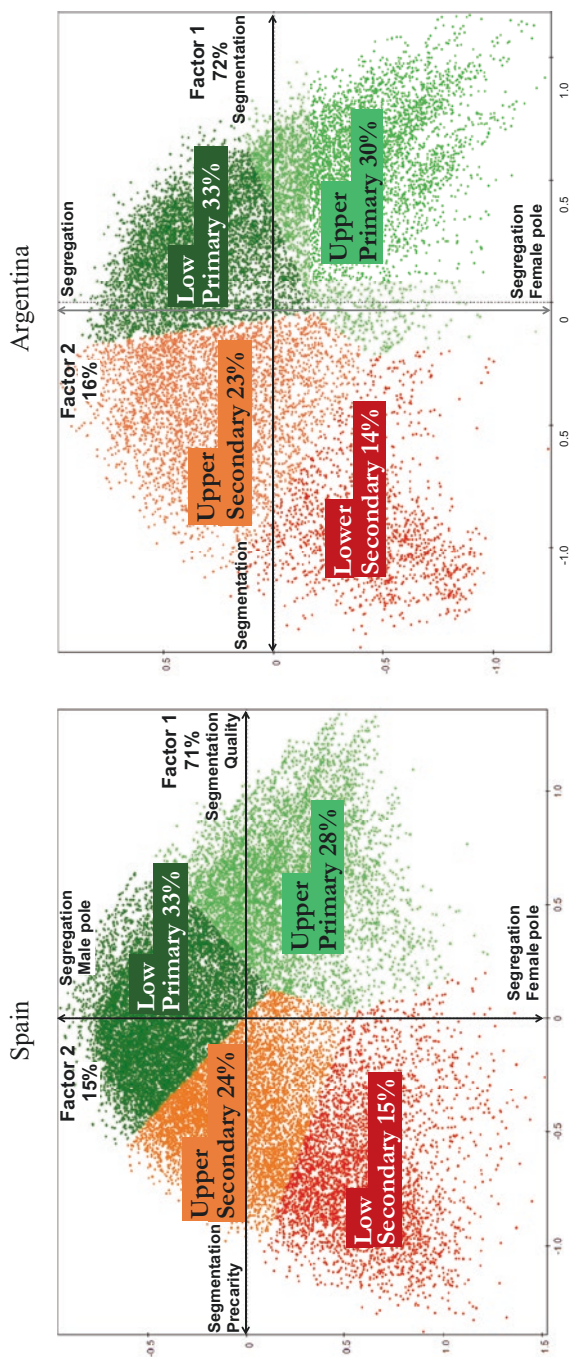


Fig. 3.4 Employment segmentation typology in Spain and Argentina. Source: Authors, based on EU-LFS 2016 and EPH 2016

informal (36%) conditions. Like the same type in Spain, there is a prominent presence of persons of immigrant origin, but it differs in terms of age, for in Argentina this segment is not typically young, but tends to polarise the very young and the very old.

The second type, with 23% of cases, identifies, as in Spain, the upper secondary segment, with an absolute dominance of insecurity and low skills: 59% informal labour, 19% temporary contracts, 42% unskilled labour and 52% operational qualification. Correspondingly, they have low salaries that move between deciles 1 and 4. Unlike Spain, there is a predominance of males (68%) and employment in small, private construction, commerce and also industrial sector 1 companies, in some cases with some seniority in the company. These employees are essentially young people with low levels of education.

The third Argentinian type represents 33% of salaried workers, and as in Spain is classed as the lower primary segment. It also employs indefinite (87%) full-time workers with operational qualifications (78%) in private industry 2 and 3, commerce, transport and communications companies, which tend to be medium-sized or large. However, seniority in the company is not a prominent feature as it is in Spain, which is a factor that is distributed similarly across the whole of the salaried population. But it is located in the medium income levels, between deciles 5 and 8. It is also similarly male dominated (80%), with a predominance of secondary education and intermediate ages.

Finally, the fourth type corresponds to the upper primary segment with a weight of 31%. Its profile is similar to its Spanish counterpart in identifying the highest quality jobs: indefinite contracts, specialist or professional skills, the highest income, and the greatest seniority in the company. It also tends to relate to large companies with a predominance of employment in public administration and support services (79%), together with the financial-professional sector. It also tends to include natives from 35 years of age with an even greater predominance of females than in Spain (63%), and with a high level of education. This latter feature differs from Spain in terms of composition, for in Argentina the segment is divided between 38% with university degrees and 36% with a *terciario* (associate's) degree.

These results therefore verify the high degree of similarity between the structures of the Spanish and Argentinian labour markets, with a typology of labour segments that typifies inequalities between paid employment in a similar manner, even in terms of magnitudes. Table 3.3 shows the four types that emerged from our analysis and that we have identified as the primary segment, separating the upper from the lower, and the secondary segment, also distinguishing between upper and lower levels. This division of salaried labour into four types also reveals the segmentation of the labour market in dual terms, grouping the two primary and two secondary segments, or in terms of a triad of categories combining the two secondary types, as shown in the table. These realities have emerged from looking inside each country, considering their own profiles and the relative positions of each labour context. But what is most relevant is the confluence of labour segmentation dynamics in both countries, with the same general features in their results and the emergence of very similar segments that identify and stratify labour inequalities.

Table 3.3 Distribution of employment segmentation typology for Spain and Argentina according to different number of segments

Typology with 4 segments	Spain (%)	Argentina (%)	Typology with 3 segments	Spain (%)	Argentina (%)	Typology with 2 segments	Spain (%)	Argentina (%)
Upper primary	28	30	Upper primary	28	30	Primary	61	63
Lower primary	33	33	Lower primary	33	33			
Upper secondary	24	23	Secondary	39	37	Secondary	39	37
Lower secondary	15	14						

Source: Authors, based on EU-LFS 2016 and EPH 2016

3.5 Conclusions

In the analysis presented herein, we have been able to verify the existence of a common general pattern between the structures of the Spanish and Argentinian labour markets in terms of segmentation, as proposed in our hypothesis. We confirm the configuration of four labour segments, expressible in the form of a triad or dichotomy, and which respond to the profiles described in the segmentationist literature. Thus, two axes are established that divide the wage-earning population. A principal axis of segmentation separates quality employment from instability, a dimension that respectively differentiates the profiles of the primary and secondary segments. A second axis of division introduces us to the segregation of labour by sectors associated with the gender dimension, where male, intermediate skilled, blue collar jobs in industry are contrasted against jobs filled to a greater extent by women, who are polarised between the most highly skilled, white-collar work, especially in the public sector, and unstable, unskilled service work.

The four-segment typology is observed both in Spain and in Argentina with very similar percentile distributions and, above all, described by very similar dominant profiles. In both cases, we have also observed similar labour market structures in terms of both the supply and demand of labour. It is important to note that both Spanish and Argentinian segmentation are the relative expression of the realities in each territory, hence the grouping reflects very similar characteristic traits despite the differing levels of development and social regulation. Their occupational and educational structures do most certainly differ, and informal labour is a particularly distinctive phenomenon in Argentina, and in one case the regulatory social model is uncoordinated and in the other it is semi-coordinated, but despite these different socio-productive contexts, the structures of the inequalities in the labour market share factors of differentiation and there are many common elements to the way labour is stratified in both countries.

These results encourage a more in-depth examination of this phenomenon and should guide future research by extending such case studies to a wider range of

European and Latin American countries. We appreciate that the hypotheses that have guided our research require further analysis and are subject to later evidence and corroborations that we shall be undertaking in future studies. Indeed, we are already working on a comparative analysis that also incorporates Italy and Chile (Fachelli et al. 2019) where we have been able to corroborate similar results for the four countries. So it will be interesting to ask how far the results achieved thus far are confirmed in a broader comparison of countries, or if, on the contrary, different segmentation models arise. To do so, it will be important to more explicitly incorporate the factors related to the regulatory social model, looking in greater depth at both the comparative institutional elements of labour regulation and labour models, and at the welfare state and association with the social organisation of reproduction. This may produce explanations for unequal living conditions and provide diagnoses that can help to guide public policies.

The labour market is a privileged area of socioeconomic organisation for the study of inequality, especially in the contemporary era, which is so characterised, as we have seen, by such major heterogeneity of labour conditions in comparison with the period of standardisation that was so typical of Fordism and mass manufacture. In our analysis we have focused on the wage-earning population, but the heterogeneity of labour and working conditions would be even more evident even if we were also to consider self-employment or quasi-subordinate work that, especially if skilled, satisfies the need for flexibility in the growing demand for services, in a phase of transition to the tertiary economy, and which is destined to be flooded by the use of digital technologies and become increasingly more global.

Meanwhile, the comparative analysis of the two countries studied, taking into account their differing degrees of economic development and productive structures, levels of informal labour, as well as the different demographic structures and levels of educational of the employed population, seems to confirm the hypothesis of convergence or limited differences in terms of the inequality between the two countries, even though these inequalities are still they expanding, or as strong as ever, within their national contexts. As the data is not longitudinal, nor presented in historical series, we have obviously not been able to assess changing trends, but instead have provided a snapshot of the stratification of labour and jobs from a comparative perspective. Future research will need to introduce a more dynamic perspective in order to analyse changes over time and also in terms of career paths in order to better capture and explain labour segmentation processes. In our static comparative study we have observed a similar segmentation structure in the two countries, which again confirms the theories of labour market dualism, with internal divisions too, interacting with factors both of labour supply and demand that evidence the correspondence between the primary and secondary segments of the labour market and certain socio-biographical characteristics of employees. In fact, our analysis integrates the dimensions of 'inequalities of conditions' and of 'inequalities of opportunities' linked to the characteristics of workers, such as sex, age, level of education and immigrant origin. The evident inequalities in the labour markets of both economies are the result of the categorisation, discrimination and generation of hierarchies of labour that continue to perpetuate in our societies.

Going back to the questions raised in the introduction, we could say that labour inequalities originate from the types of capitalism and social organisation that are used in the division of productive and reproductive tasks. The similarities found between the two countries therefore transcend the particularities of a given stage of economic development or the structural model of the economy. Naturally, tax, economic and labour policies and the welfare state play a decisive role in correcting and reducing inequalities, as shown in the previous chapter. Segmentation, instability and under-employment are not new phenomena in either country. The persistence of labour segmentation and the consolidation of a large secondary segment, a large number of whom endure poor labour conditions, mean that it is a structural phenomenon. It is a pressing reality that requires major reforms to prevent and eradicate these extreme situations and to create decent work with guarantees of autonomous, non-deprived social life.

The struggle against labour market segmentation is an explicit goal of European Union policy, included in the Treaty on the Functioning of the European Union, and is part of the proclamation of the European Pillar of Social Rights, through which the EU has reaffirmed its commitment to guaranteeing improvements to living and working conditions throughout Europe. The European Union's labour policy establishes the creation of more and better jobs as one of the main targets of its Europe 2020 Strategy. The latest guidelines for 2018, and according to the European Parliament, explicitly state the need for "Better functioning of labour markets (with a specific focus on labour market segmentation)" in the context of the European Employment Strategy, where it also seeks to increase the demand for labour (job creation, labour taxes and wage setting); improve labour supply and skills (including young people and long-term unemployment) and promote equity, combat poverty and foster equal opportunities for all.

The economic crisis and the fact that social and employment policies are mainly the responsibility of national governments have led both to the reproduction and the worsening of inequalities generated in the labour market, mainly marked by policies aimed at flexibilization, the diversity of responses and labour realities throughout the European Union (Eurofund 2019). In the case of Latin America, employment policies are exclusively national and, in general, although they deal with similar problems with their economic and labour structures, they have tended to reduce the inequality with respect to European countries.

Both in one territorial context and the other, an analysis of inequality in the labour market and its expression in terms of segmentation lead us to consider certain general recommendations for public policies. The complexity of the phenomenon of inequality in the labour market requires these public policies to be designed from different fields and perspectives, transcending the strictest scope of employment policies in order to consider both pre-distributive and post-distributive policies, social policies, education policies, gender policies and industrial policies. Thinking in the long term, the ability and willingness to imagine structural reforms with other coordinated policies, public and private investment, and of an economic, social and employment order, has become essential in order to reverse the inefficient and unequal production and labour realities that are persisting over time. Such a change of course must also necessarily contemplate bargaining and agreement processes between social agents.

Appendix

Table 3.4 Frequency distribution of employment segmentation variables. 2016 salaried population employed in Spain and Argentina

Dimension	Spain			Argentina			
	Variables	Frequency	%	Variables	Frequency	%	
Demand variables							
1. Security	Type of contract and duration						
	Open-ended	22,472	75.6	Open-ended	10,885	61.2	
	At least 1 month	2957	9.9	–			
	<6 months	2580	8.7	<6 months	1788	10.1	
	>6 months	1714	5.8	>6 months	888	5.0	
	–			Informal employment	4226	23.8	
	No data ¹	(314)	–	No data ¹	(9)	–	
	Seniority in the company						
	<1 year	5260	17.5	<3 months	1394	7.9	
	2–3 years	3773	12.6	3–6 months	782	4.4	
	4–10 years	7080	23.6	6–12 months	890	5.1	
	11–20 years	7171	23.9	1–5 years	6013	34.1	
	+20 years	6753	22.5	>5 years	8542	48.5	
				No data ¹	(176)	–	
	Type of workday						
	Full-time	25,082	83.5	Full-time	13,378	77.8	
	Part-time	4955	16.5	Part-time	3817	22.2	
				No data	(603)	–	
	2. Qualification	Occupation					
		Manager & Professional	6282	21.0	Professional	1506	8.5
		Technician & Administrative	6998	23.4	Technician	3089	17.4
Skill worker		12,343	41.4	Operational qualification	8358	47.0	
Unskill worker		4226	14.2	Unskill worker	4845	27.2	
No data ¹		(188)	–	No data ¹	(134)	–	
Supervision							
Employee		25,121	84.5	Employee	16,865	95.3	
Person in charge		1912	6.4	–			
Middle manager		2113	7.1	Middle manager	536	3.0	
Manager		584	2.0	Manager	296	1.7	
No data ¹		(307)	–	No data ¹	(53)	–	

(continued)

Table 3.4 (continued)

Dimension	Spain			Argentina		
	Variables	Frequency	%	Variables	Frequency	%
3. Salary	Salary deciles					
	Decile 1	2949	9.8	Decile 1	1632	9.2
	Decile 2	2832	9.4	Decile 2	1285	7.2
	Decile 3	2904	9.7	Decile 3	1371	7.7
	Decile 4	3017	10.0	Decile 4	1585	8.9
	Decile 5	2906	9.7	Decile 5	1984	11.1
	Decile 6	3086	10.3	Decile 6	1454	8.2
	Decile 7	2991	10.0	Decile 7	471	2.6
	Decile 8	3074	10.2	Decile 8	1735	9.7
	Decile 9	3163	10.5	Decile 9	1299	7.3
	Decile 10	3115	10.4	Decile 10	1316	7.4
			No data	3668	20.6	
4. Characterization of the company	Activity sector					
	Primary	809	2.7	Primary	185	1.1
	Industry 1	1494	5.0	Industry 1	1088	6.2
	Industry 2	1895	6.3	Industry 2	393	2.2
	Industry 3	1380	4.6	Industry 3	806	4.6
	Construction	1454	4.8	Construction	1170	6.7
	Retail	6302	21.0	Retail	2274	13.0
	Transport- Communications	2129	7.1	Transport- Communications	1387	7.9
	Finance- Professionals	3536	11.8	Finance- Professionals	1003	5.7
	Public Administration	8872	29.5	Administration-Ser	6163	35.2
	Other services	2166	7.2	Other services	3040	17.4
				No data ¹	(245)	–
	Ownership of the company					
	Public	7199	24.0	Public	4348	24.4
	Private	22,838	76.0	Private	13,450	75.6
				No data ¹	(240)	–
	Company size					
<6 workers	5270	17.5	<6 workers	4767	26.8	
6–10	2132	7.1	6–10	1679	9.4	
11–49	6757	22.5	11–40	2684	15.1	
50–250	5014	16.7	41–200	2255	12.7	
>250	4428	14.7	>200	2632	14.8	
No data	6436	21.4	No data	3782	21.3	

(continued)

Table 3.4 (continued)

Dimension	Spain			Argentina		
	Variables	Frequency	%	Variables	Frequency	%
Supply variables						
5. Gender	Sex					
	Male	15,383	51.2	Male	9707	54.5
	Female	14,654	48.8	Female	8091	45.5
6. Age	Age					
	16–24 years	1456	4.8	16–24 years	2380	13.4
	25–29 years	2388	8.0	25–29 years	2404	13.5
	30–34 years	2959	9.9	30–34 years	2285	12.8
	35–39 years	4251	14.2	35–39 years	2497	14.0
	40–44 years	4662	15.5	40–44 years	2202	12.4
	45–49 years	4491	15.0	45–49 years	1813	10.2
	50–54 years	4385	14.6	50–54 years	1624	9.1
	55–59 years	3569	11.9	55–59 years	1241	7.0
	60+	1876	6.2	60+	1351	7.6
7. Immigration	Nationality					
	Spanish	27,700	92.2	Argentinian local	14,482	81.4
	Double nationality	709	2.4	Argentinian province	2400	13.5
	Foreign	1628	5.4	Foreign	909	5.1
				No data ¹	(6)	–
8. Education	Educational level					
	Primary	1448	4.8	Primary	5942	33.5
	Secondary first stage	8124	27.0	Secondary	5894	33.2
	Secondary second stage	7027	23.4	Tertiary	3510	19.8
	Vocational training	4187	13.9	University	2394	13.5
	University	9251	30.8	No data ¹	(59)	–
Total		30,037	100		17,798	100

(continued)

Table 3.4 (continued)

Dimension	Spain			Argentina		
	Variables	Frequency	%	Variables	Frequency	%
	Source: INE, EU-LFS, annual data for 2016. 1. Categories treated as illustrative with random assignment by low frequency (1.9% or less). After cleaning, of the 74 categories, 66 are considered active. 2. The grouping of sectors can be consulted in the EU-LFS methodological information. In particular, Industry 1 is: food, textiles, leather, wood and paper; Industry 2: extractive, petroleum refining, chemical, pharmaceutical, rubber and plastics industry, and Industry 3: construction of machinery, electrical equipment and transport equipment. Industrial installation and repair.			Source: INDEC. Encuesta Permanente de Hogares, second quarter of 2016. 1. Categories treated as illustrative with random assignment by low frequency (1% or less). After cleaning, of the 74 categories 65 are considered active. 2. The grouping was carried out based on CAES 1.0. It was homogenized with the classification of Spain and the different items are marked below: Industry 1: idem Spain. Industry 2: Idem Spain + Glass. Industry 3: Idem Spain + Metal Fab. Fab. Gas, electricity and steam. Administration: Public Adm. And Support Services. Other services: Water, sewage and waste management; Accommodation and catering services; Domestic Employers. 3. Amount for salaries/wages, family salary, overtime, other bonuses and tickets.		

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Chapter 4

Education and Inequality in Finland, Spain and Brazil



José Saturnino Martínez García, Eriikka Oinonen, Rafael Merino, and Graziela Perosa

Abstract Finland, Spain and Brazil are three very internally complex and heterogeneous realities, with contradictions and permanent reforms to their education systems. In a first quantitative approach each country can be placed in a continuum of the education system that goes from most successful in terms of reaching a high level of education all across the population, in conditions of equity and facilitating youths' incorporation into the labour market, to least successful, with Finland and Brazil occupying either end of the spectrum respectively and Spain occupying an intermediate situation. Although there are differences, they share certain tensions in their respective education systems. On the one hand, about the conception of education, ranging from more utilitarian, human capital theories, to the more humanist and civic-minded perspective. On the other hand, the challenge of comprehensiveness between an academic and a vocational path. In addition, there is also the challenge of improving the education level of the population while also improving equality. The tensions differ from country to country, since their education traditions and cooperation and conflict strategies between the education agents, with

J. S. Martínez García (✉)

Departamento de Sociología y Antropología, Universidad de La Laguna,
Santa Cruz de Tenerife, Spain
e-mail: josamaga@ull.es

E. Oinonen

Research School of Social Sciences and Humanities, University of Tampere,
Tampere, Finland
e-mail: Eriikka.Oinonen@uta.fi

R. Merino

Grupo de Investigación en Educación y Trabajo, Universitat Autònoma de Barcelona,
Barcelona, Spain
e-mail: Rafael.Merino@uab.cat

G. Perosa

Escola de Artes, Ciências y Humanidades, Universidade de Sao Paulo, Sao Paulo, Brasil
e-mail: gperosa@usp.br

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varying levels of resources and different alliances with political actors vary, as does the social consensus.

Keywords Education inequality · Educational systems · Brazil · Spain · Finland

4.1 Introduction

We have selected three countries with very different social and educational situations; these are Finland, Spain and Brazil. Finland is a country with a longstanding tradition in providing public education, with an advanced economy and an education system that has been a worldwide benchmark since the standardised PISA evaluations. Spain is a country of greater economic backwardness, and although it has experienced rapid economic growth in recent decades, the economic downturn of 2008 affected it especially. In turn, Brazil's economy is growing strongly, but it has started at a very low level and has huge territorial dispersion. Until relatively recently, its education system had not reached broad sections of the population, and it still has many problems both reaching all social strata and from the point of view of equality.

Despite the considerable differences in the three countries, there are a number of common elements. On the one hand, in all three there is a clear discourse in favour of education, guided by the theories of human capital, which see education as a resource. This discourse can be seen to a greater or lesser extent to be counteracted by the discourse that sees education as a source of citizenship. There are also similarities in terms of equity, either by promoting public education, albeit in different ways, with greater intervention by the state in the education system, regulating private centres with public funds or guaranteeing access quotas for students from the most popular sectors.

The generic trends in the educational debate are present in each country, but they take different forms, considering their historical, economic and social situation.

This chapter provides a general presentation of the difficulties of conducting comparative studies in education. Below we present internationally comparative data that serve to locate the three countries chosen for comparison. Subsequently, we perform a more in-depth study of the educational situation of each country.

4.2 International Comparison of Education

The comparison of education systems presents serious challenges and difficulties. First, the comparison of societies themselves has epistemological difficulties stemming from the selection of the unit to be compared. Based on the size of the nation state, the political-administrative unit of the state became the unit to be compared.

It is important to remember that precisely the construction of the national education systems contributed to the consolidation of the nation states and to the creation of the citizenry who legitimised these states. The exportation of this model to countries colonised by the Europe a powers also led to the exportation of the cultural models on which education was based (Torres 2017).

In the educational field, more difficulties arise for the comparison. Although certain structural trends are shared, such as the rise in education rates, the construction of education systems has a historical, cultural and “societal” context (Maurice et al. 1982; Lendaro 2012) which means that each education system has its own characteristics that are difficult to grasp for those people not educated in a national system. Part of the difficulty of immigrant children and young people’s integration in receiving countries is related to the foreignness of the cultural, organisational and didactic parameters of the education centres. For example, the presence and quantitative or qualitative importance of private education depends on this historical-cultural context. Another point of difficulty is that education systems are not static. Educational regulations and reforms change, and as such, a time-based comparison must be added to the spatial comparison. Education reforms, however, can be consistent with international guidelines (Green et al. 2001), as we will see below. Another difficulty lies in the implementation and recognition of the different education levels. Although a certain consensus has been reached based on the International Standard Classification of Education (ISCED), the differences between compulsory and non-compulsory levels, or between academic and vocational studies, mean there are still grey areas in the comparisons.

If the simple exercise of comparing education levels entails huge difficulties, comparing the degree of equity or the contribution to the social reproduction of the different education systems is even more complex, since the different social structures and the different reproduction or social mobility strategies of the families must be added to the choice of schools. There is global consensus that primary education must be universal and provide all students with basic skills, regardless of class or gender. At the top of the educational pyramid, university has gone from being an elitist institution for the training of ecclesiastical officials and later politicians and business owners to an institution of middle classes that is increasingly concerned with equal access (Martín 2010). In secondary education very different responses for the connection between primary and upper education can be observed, depending on the traditions of the different countries. Some authors indicated this debate about the function of secondary education, such as Durkheim in France (Durkheim 1992) or Dewey in the United States (Hyslop-Margison 2000). The construction of a secondary education segmented between classic and academic paths on the one hand and modern and vocational paths on the other was related to the class structure that was being established in the capitalism of the end of the nineteenth century and beginning of the twentieth century (Ringer 2003). More recently, the European debate was established, classifying the education systems as “tracked”, “linked” and “unified” (Raffe 2003). The “tracked” systems have a secondary education divided into an academic path and a vocational path, usually with a very early selection of students. This selection contributes to the reproduction of social positions.

This is the system in Germanic countries, with very effective vocational training and a pronounced differentiation between centres. The “unified” systems respond to comprehensive reforms made in different European countries and in the US during the twentieth century, which delayed the age at which students choose between different paths and offered a shared curriculum. The Nordic countries took this model the furthest, within the well-known model of a strong welfare state, with redistributive and egalitarian policies. The “linked” systems are in intermediate situations, often with comprehensive lower secondary education and a higher secondary education divided between vocational and academic paths, although with “bridges” (possibilities of changing) between both paths. In general, the academic path is more prestigious than the vocational paths, which are avoided by the middle classes and by the segments of working classes who have pronounced social mobility strategies.

As stated above, educational reforms and in general the educational policy lead to changes in the education systems that take into account the comparison with other countries. There are two very clear examples of this “benchmarking”. The first is the European Union and its 2020 goals, with indicators to share on early school drop-out or girls’ access to technical careers. European convergence is also discussed a lot in higher education, with the European Higher Education Area (EHEA) and the European Credit Transfer System (ECTS), and in professional teaching, with the application of the European Credit System for Vocational Education and Training (ECVET). The second example is the well-known PISA study conducted by the OECD. Here there is a change of paradigm; convergence is no longer sought after through education organisation, but through the results of the learning. Analysing and discussing this change of paradigm is beyond the scope of this chapter, but the ranking or classification of countries according to the score obtained in the different tests has been introduced in the international agenda. Although officially the goal of copying the best is not being pursued, and certainly, the goal of compared education was never to define the best system (García 1986), what is certain is that in recent years Finland has seen an increase in the visits of experts and political actors from many countries to try to unveil the keys to success of the Finnish system with the explicit intention of importing these key elements to the national systems.

A paradigmatic example of the exportation of a successful model is that of the Germanic dual vocational training. Praised by many as a benchmark in the fit between education and employment, often the most superficial part is imported, which is that students do a considerable part of their training in companies, but the conditions facilitating this training are not imported (Köhler 1994), leading to fallacy 1:1 (Euler 2013): thinking that educational systems can be exported without taking into consideration the economic, cultural and institutional conditioning factors.

The fact that comparisons in the educational field are difficult or have undesired effects such as the ranking (for some it is a desired effect) does not mean that they are not a source of knowledge and analysis. This chapter presents a comparison between Europe and Latin America based on two axes, with all the precautions and

limitations. The first axis will be international, based on the analysis of a selection of indicators related to equity; indicators for which there is information available, indicators of access to the different educational levels and indicators of results such as the PISA tests or qualification rates. Using the database, the maximum number of countries from Europe and Latin American will be entered, and a time-based series will be reconstructed from 2000, to see the potential impact of the economic recession in Europe at the end of the first decade, and of the economic transformations the South American continent has undergone in these two decades.

This first axis will be essentially very descriptive, since, as mentioned above, exhaustive knowledge of the educational system of each country is required to analytically interpret the results. For this reason we have introduced the second axis, of a national nature, in which the debates, policies and educational reforms that have taken place in three specific countries, Finland, Brazil and Spain, will be analysed in depth to improve their positions in international competition and to develop international cooperation strategies that contribute towards improving educational equality.

To close the chapter, some conclusions are developed about the comparison of the education systems of different countries as well as a proposal for a comparative research agenda that minimises the risks and maximises the potential of educational comparison.

4.3 Historical and Economic Context

The three countries are experiencing an upward trend in the GDP per capita in purchasing power parity (Fig. 4.1), but with highs and lows as a result of successive economic downturns. Spain felt the effects of the oil crisis later than Finland, as the

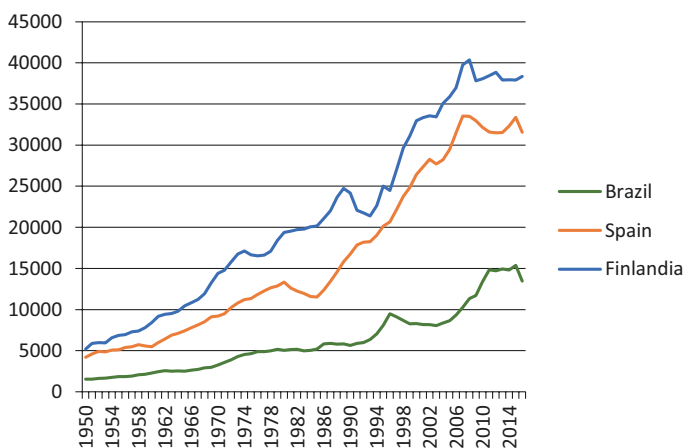


Fig. 4.1 Evolution of GDP per capita in purchasing power parity dollars (1950–2016). Source: Maddison Data Base Project (2018)

rise in the price of hydrocarbon was postponed due to political instability, and in Brazil no effect was directly observed. Prior to the 2008 recession, there was a considerable increase in the GDP per capita in the three countries, with a period of rapid growth in each country. The return to pre-recession levels has not occurred in Finland or Brazil, and Spain is demonstrating an unstable recovery.

4.3.1 Educational Level

Among the young adult population, from 25 to 34 years of age, Spain and Finland are consistent with the international averages of the OECD in the proportion of students in higher education (in Spain this includes university and higher level cycles of vocational training), around 40%, while Brazil stands at minimum levels, at a distance from the OECD levels, at a little above 10% (Fig. 4.2). Spain stands out from the other OECD countries in the large proportion of students who do not study beyond lower secondary education (the Compulsory Secondary Education (ESO), as their maximum qualification) and the low proportion in higher secondary education (*Bachillerato* and mid-level vocational training), standing at around one third of the young adult population.¹ There is also a great difference with Finland (5%) at this level, which is one of the countries with the lowest proportion of young adults in the lowest education level of those recorded (lower secondary education). In the case of Brazil, the proportion in lower secondary education is more similar to Spain.

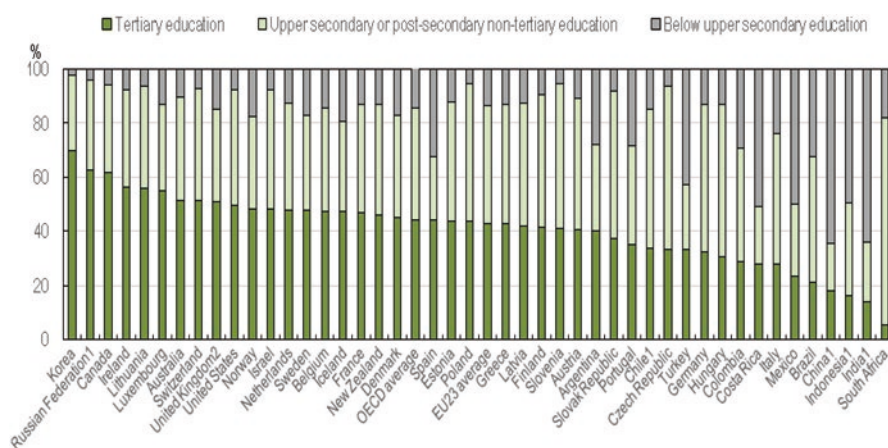


Fig. 4.2 Percentage of population aged 25–34 years, with education below Lower Secondary Education, with Upper Secondary Education and with Tertiary Education. Source: OECD (2019)

¹This is possibly due to the fact that access to education levels after the ESO requires the ESO graduate qualification. Likewise, the qualification of mid-level vocational training does not give direct access to the higher-level vocational training (Martínez and Fernández 2017; Martínez and Merino 2011).

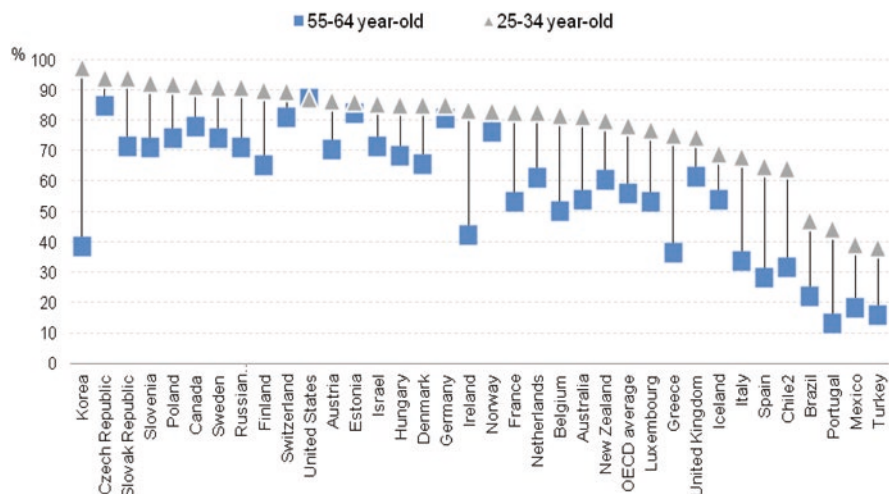


Fig. 4.3 Population with tertiary education in 2007, percentage by age group. Source: OECD (2009)

This situation has a very different historical evolution. In Fig. 4.3 we observe that the situation in Brazil has remained stagnant, by comparing the population aged between 25 and 34 with the population aged between 55 and 64 in 2007, while Spain is one of the OECD countries to have most improved, after South Korea and Ireland. In turn, Finland follows a similar progression to the OECD average. The educational levels of young adults have improved in the last decade, and it is important to note the case of Brazil, which seems to have started to take off, after its secular stagnation (see Table 4.3 in the Appendix). There is also an inverse gap in education, since the education level reached by women tends to be higher than that of men.

4.3.2 PISA Results

The average results in the countries participating in PISA between 2000 and 2015 stand at very similar levels in reading competency (Table 4.1). In the case of Spain, the differences are not statistically significant, while in Brazil there is a slight improvement, and in Finland a worsening (Table 4.2).

In general it is observed that the countries that have improved in PISA are those that began with very low competence levels and whose economic situation improved intensely in the first decade of the millennium (Rowley et al. 2019). The trend towards stability, which is observed in the majority of the countries, does not coincide with the worsening in skills in Finland. A statistical effect of regression towards

Table 4.1 Correlations between results in reading literacy between 2015 and 2000

		2000Score
2015Score	Pearson correlation	0.910**
	Sig. (bilateral)	0.000
	N	41

Source: Authors elaboration

**The correlation is significant at the 0.01 level (bilateral)

Table 4.2 Evolution of reading skills in PISA

Country	2018	2015	2012	2009	2006	2003	2000
Brazil	413	407	407	412	393	403	396
Finland	520	526	524	536	547	543	546
Spain	*	496	488	481	461	481	493
OECD	487	493	496	493	489	494	493

Source: OECD, various years

*No data available for Spain.

the average appears to be observed (the most advantaged or disadvantaged tend to move towards average values).

4.3.3 *Unequal Opportunities in PISA and Social Origin*

If we compare the unequal opportunities in science competences between 2006 and 2015, we do not observe statistically significant differences in Finland and Spain, as occurs with the majority of the participating countries. But in Brazil there has been a 4% reduction in unequal opportunities, as can be observed in Fig. 4.4.

As regards the effect of economic inequality (measured by the Gini index) on the educational results, although some authors highlight its importance (Baudelot and Establet 2009), it appears to be a hasty reading of the data. Graph 5 shows the relation between the two indicators. A clear trend cannot be observed, especially if we separate the OECD countries from non-OECD countries. The Latin American countries are notable for their high level of economic inequality, especially Brazil, while inequality in Finland is quite low and in Spain it stands at the average of the OECD countries, but it is considerably high for an EU country. The correlation between the score in reading and economic inequality for the OECD countries is due to the anomalous behaviour compared to Turkey, Mexico and Chile, with very high levels of inequality for the OECD and low scores in reading.

4.4 Education in Finland

Education has played a pivotal role in the development of independent Finland, the Finnish society and welfare state. On the one hand, mass education was part of the rationalistic ideology of modern society. On the other hand, education was

considered as a social right, and as a service provided by the state to its citizens (Blanco and Oinonen 2019).

The education level of Finland's population has risen steadily since 1917, during the decades of independence. In the early years of independence, the challenge was to guarantee primary education to all children. The Compulsory School Attendance Act came into effect in 1921, and accordingly, 6 years of compulsory education applied to all children aged 7–13. In 1920, around 70% of 15-year-olds were literate but the number of pupils in primary schools rose quickly after the act came into effect. By the mid-1930s, 90% of children aged 7–15 received schooling and, gradually, all children of school age were in education. In the late 1950s, 2 years of civic school were added to primary education, which then consisted of 8 years. In this system, in fourth grade, pupils applied for admission to secondary school, which opened the doors to further studies such as the matriculation examination. Those who were not admitted to secondary school or whose parents could not afford or did not want to educate their children, stayed in primary school (Statistics Finland 2019).

The increasing wealth and standard of living of families, and the rapid structural change from an agrarian to an industrial and service society meant that parents increasingly wanted their children to receive better education than before and young people needed to be educated to find their place in the changing labour markets. Consequently, by the 1970s, already 60% of the age group went on to middle school, that is, the lowest grades of secondary school (Ibid.).

A law on the basis of the education system was enacted in 1968, and the comprehensive school was established. The idea of a comprehensive school for all was based on the underlying values of the Nordic welfare state ideology: social equality, collective responsibility, solidarity and equal opportunities. The reform of comprehensive education created the basis for uniform, consistent and high-quality education for all, regardless of their social origin, status and place of residence. Everybody in the same cohort received uniform, free education for 9 years after which they could continue either to upper secondary school and then higher education or to vocational education (Blanco and Oinonen 2019). Currently the statutory school age covers the 7–16 age group, and a person cannot be exempt from it. In the early 2000s, pre-primary education was reformed and, as a result, all 6-year-old children are entitled to receive pre-primary education during the year before their compulsory education starts (Statistics Finland 2019). Furthermore, the government has made a proposal to the parliament to raise the age of compulsory education from 16 to 18. The act is expected to be in force in 2021.

Secondary school attendance was rare until 1920. Less than 10% of the age group went to secondary school and most of them were children from affluent urban families. By 1960, around 40% of the age group went to secondary school and an increasing number of the pupils were children of parents with only compulsory education. In the early 1970s the number of children who started secondary school rose to 60%. Consequently, attendance in upper secondary general school, i.e. higher grades of secondary school, rose quickly. In 1960, around 20% of the age group went to upper secondary school whereas 20 years later the corresponding percentage was 50. In the 2000s the annual number of entrants to upper secondary

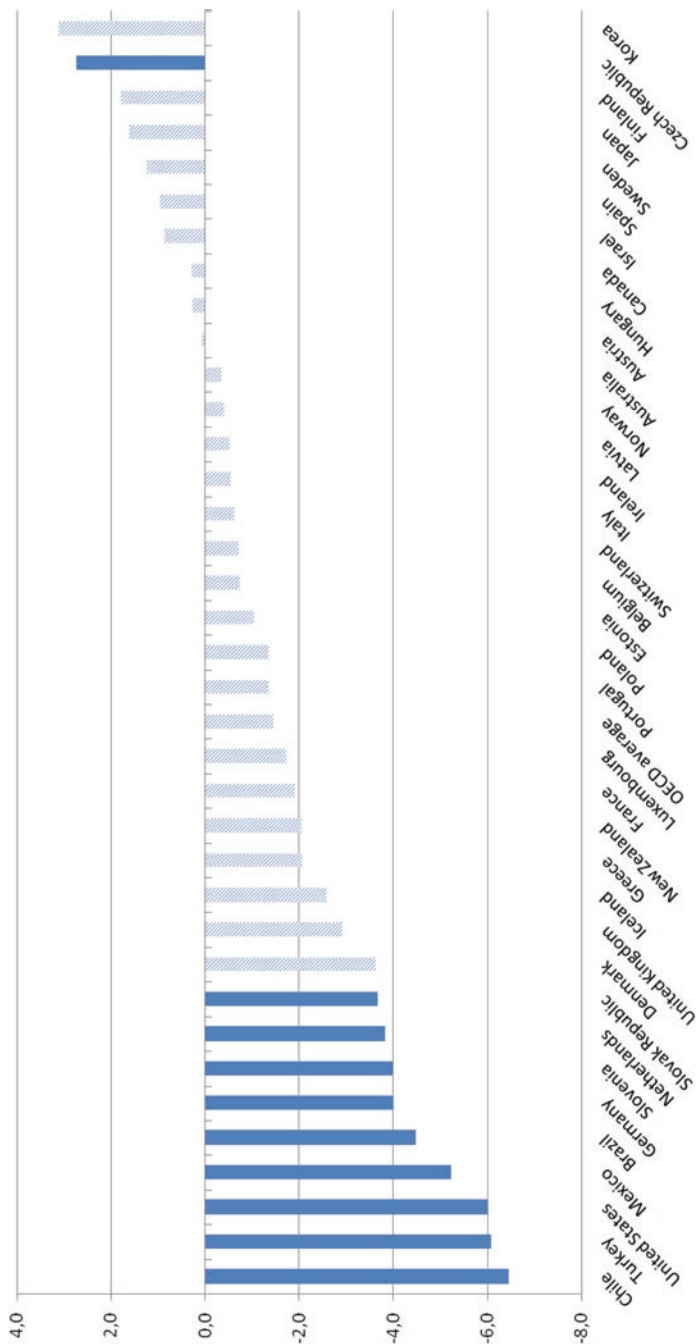


Fig. 4.4 Percentage of variation in science performance explained by students' socio-economic status, 2015–2006. Note: Only solid color rectangles are statistically significant. Source: OECD (2016)

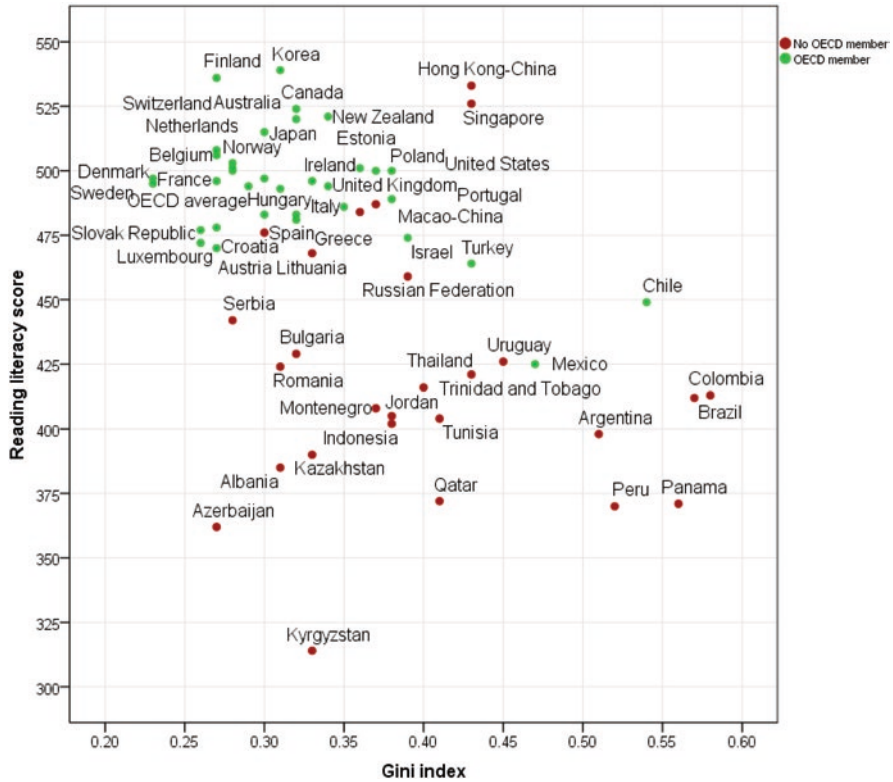


Fig. 4.5 Relationship between reading literacy and Gini index (economic inequality), differentiating between OECD countries and the rest. Source: OECD (2010)

general school has exceeded 60% among 16-year-olds (Statistics Finland 2019). Besides the general increase in education level, women’s education level has exceeded that of men. 1947 was the first (peace time) year when the number of women who passed matriculation examination exceeded that of men. Today, nearly 60% of the pupils who pass the matriculation examination are women (Ibid.) Naturally, this was also reflected in higher education.

Higher education in Finland dates back to 1640 when the first university, the Academy of Turku, was founded. It was moved to the new capital Helsinki in 1827 and renamed as the Imperial Alexander University in Finland and University of Helsinki, from 1919. The University of Helsinki remained the only university in the country until the early twentieth century. Since the late 1960s and 1970s, the expansion of higher education both in terms of student numbers and the geographical spread of new institutions occurred. Expansion continued in the 1990s when a new sector of higher education, Universities of Applied Sciences, was established. The aim was to increase the level of know-how of the workforce and to facilitate the change from secondary education to higher education (Antikainen 2006; Blanco

and Oinonen 2019; Välimaa 2018). Universities also opened satellite campuses, called university centres, in towns without a university of their own (OECD 2017). Currently in Finland, there are 13 universities, 11 of which are public universities (with free tuition for Finnish students) and 2 of which are foundation universities with free tuition for Finnish students and students from the EU and EEA member states. There are also 23 Universities of Applied Sciences (OKM 2019a).

Until the real expansion of higher education in the 1960s, universities were elite institutions, as indicated by the student numbers. In 1900, there were 2500 students at the University of Helsinki. In 1920, there were 3600 students in all the universities together. In 1950, the number of students in universities in Finland had exceeded 10,000. The 1960s was the turning point in Finnish higher education. In 1960, the number of university students was 20,000 but by the end of the decade the number had tripled to 60,000 (Statistics Finland 2019). Today, 41% of 25–34-year-olds hold a tertiary degree. The figure is below the OECD average largely due to the selective admission system compared to many other OECD countries (OECD 2019.)

Women's attendance in higher education has a longstanding tradition in Finland. Since 1885, women have been able to attend university and their numbers increased quickly. By 1907, 21% of all students were women. Compared to other European and Nordic countries, the proportion of female secondary school graduates and university students was high in Finland (Blanco and Oinonen 2019; Välimaa 2018). After the Second World War, the number of women in higher education grew substantially. Today, women complete nearly 60% of all university degrees in Finland (OECD 2019).

Vocational education has also increased in Finland. Although vocational colleges were already established during the late nineteenth century, the act on vocational schools was passed in 1958. Vocation school could be attended after primary school. Vocational education has undergone continuous changes and developments over the past decades. Currently it takes 3 years to obtain a vocational qualification. Recently apprenticeship training and competence-based skills examination has been emphasised in the Finnish vocational training system (Statistics Finland 2019).

4.4.1 Neoliberal Turn in Education Policies

Neoliberal discourse started to influence the Finnish social and education policies at the beginning of the 1990s. The universal comprehensive school was accused of 'levelling' students, not recognising and fostering the potential of gifted students, and of its inability to meet the needs of the information society and ever-increasing global economic competition. The demand for 'freedom of choice' in schools emerged alongside the idea of the education system as a service aimed at enhancing the economic competitiveness of the country. Ideas of new public management, continuous assessment and accountability were adopted in education policies during the 1990s (Tervamäki and Tomperi 2018). However, Finland's enormous success in PISA assessments starting from 2001 subdued the heavy criticism of the

comprehensive school system (Rinne and Järvinen 2010). As the PISA-fever has subsided, voices demanding a more structurally efficient and flexible education system that better meets the needs of changing labour markets are increasingly louder.

The former Prime Minister Juha Sipilä's centre-right government (2015–2019) started extensive and fast-moving reforms in the Finnish education system. According to the government programme Finland, a land of solutions (VNK 2015), the focal aim of the education policy was the so-called digital leap that is modernising digital learning environments, approaches to pedagogy, and fostering connections between education and working and business life. One of the original flagship initiatives of Sipilä's government was the Reform of Vocational Upper Secondary Education (VET), which came into effect in 2018. It aims to effectively reorganise vocational education to be demand-driven, competence-based and customer-oriented (OKM 2019b). The VET reform is defined by the same catchwords and leading principles that are central to the PM Sipilä's government's education policy as a whole, and at all levels of education. From preschool to university, education and training must provide individual learning paths that flexibly and swiftly respond to the needs of future work life that requires new kinds of competences.

Like in most countries, in Finland, higher education and especially the university sector have been most severely affected by the neo-liberal tide in education policies (Lindberg 2013). In line with the wider higher education reform in the European Union, the Universities Act (558/2009) that came into effect in 2010 was built on such principles as transparency, participation, accountability, effectiveness and coherence. Universities were no longer treated as government accounting offices. Consequently, universities' financial and administrative authority strengthened, and they became separated from state bureaucratic structures. Nevertheless, the state still holds strong financial control over universities' affairs. According to Timo Aarrevaara, academic freedom (emphasised in the act) has shifted towards greater economic freedom rather than freedom of research, teaching and learning (Aarrevaara 2010).

The need for structural reform has become a dogma particularly in the Finnish higher education policy, even though many researchers and education experts have questioned its rationality, grounds and current measures. The demand on universities to enhance their effectiveness (shorter duration of studies, students' quicker transition to work life, enhanced collaboration between universities and business, more profiled division of labour between universities, etc.) is linked with tightened funding. Paradoxically, higher education institutions (as well as upper secondary education institutions) are expected to perform more and better with fewer resources. Furthermore, a large proportion of previously basic funding has been converted into strategic, competitive funding. The consequence is that education policy reforms are no longer long-term development schemes but short-term projects leading to stop-go policies (Lindberg 2013; Tervämäki and Tomperi 2018). This, and the fact that current education policies appear to be based on a strong belief that employers and enterprises are better able to steer education and training than schools, teachers, pedagogical specialists and researchers, has triggered discussion about the state and future of social and educational equality in Finland.

4.4.2 *Education and (In)equality*

Over the past 50 years, the Finnish education system has been quite successful at providing educational opportunities for all. This, however, does not mean that inequalities have disappeared. Until recently, social mobility has been common in Finland thanks to the universal and free education and to an educational system in which students can move from vocational education to university studies and vice versa. Lately, however, the rise of education level has halted while, at the same time, both education level and choice of educational careers appear to be increasingly hereditary in Finland (Keski-Petäjä and Witting 2016). In fact, teachers, rectors, councillors, professors and researchers, as well as social workers, have observed that social stratification in Finland is increasing along with the neoliberal turn in the education policy (Kirjavainen and Pulkkinen 2017; Vettenranta 2015).

Market oriented (neoliberal) education policies and reforms emphasise personalised learning paths and expect students—young and adults alike—to be increasingly self-guided and self-directed in their studies. Not all students have the ability to individually self-direct their education careers successfully. Actually, there are studies indicating that a large number of students (at all levels of education) hope for more structured teaching [e.g. Amisbarometri 2015 (2017)]. The critics emphasise that ‘freedom to choose’ policies should be accompanied with proper guidance and counselling resources to ensure that education reforms do not jeopardise equal opportunities for education and training, work career and well-being (see e.g. Rinne and Järvinen 2010; Tervamäki and Tomperi 2018). Due to severe budget cuts in the education sector, adequate resources for education institutions to provide personalised guidance and counselling are not available. Under these circumstances, it is expected that those who have personal and social resources, capabilities and support from home, family or circle of significant others will benefit from ‘freedom of choice’ and do well. However, those who have challenges, be they in learning, in language skills, cultural competences or social support will find it equally if not more demanding than before to make their way in the education system and later in their working life.

There are significant differences, for example, in attitudes towards education, in learning opportunities and learning outcomes between boys and girls, between original population and immigrants, and between students in vocational education and general upper secondary education. The feminisation of education has been a public concern for some time in Finland. According to statistics, boys are more likely to choose vocational rather than general upper secondary education than girls after compulsory education. Males are also more likely than females to drop out of education (Rinne and Järvinen 2011). Consequently, the majority of university graduates are women in all fields with the exception of natural sciences, where the gender division is fifty-fifty, and information and communication technology (ICT) and technical sciences where a minority of graduates are female (Statistics Finland 2018). Gendered career choices in education are also reflected in segregated labour markets. Even though Finnish women are, generally speaking, better educated than

men, the proportion of women in managerial positions is slowly rising (Koivunen 2015).

The latest development in Finnish education policies has raised a lot of public discussion and concern. Sometimes the critics of current policies are labelled as those resisting change. It is clear that the education system must develop according to the changing world, but the question is how and on whose terms. Market oriented education policies have presented business and commerce as experts to steer and plan education. This has led to a rather one-sided view of the skills needed in the future to ensure economic growth and well-being in Finland. The emphasis is placed on mathematics, natural sciences, technology and ICT, leaving humanistic and social scientific subjects aside (Tervamäki and Tomperi 2018).

From an international perspective, Finnish education institutions appear to be equal in standards of education and professional skills of teachers and staff. Regardless of recent changes, the effects of social origin, status and place of residence on educational opportunities in Finland are slight compared to most countries and the general education level of Finnish people is high. The Prime Minister Antti Rinne and coalition government published their strategic programme Inclusive and Competent Finland—a socially, economically and ecologically sustainable society in June 2019 (VNK 2019). Rinne's coalition government and the new coalition government led by Prime Minister Sanna Marin (from 10.12.2019) plans to revive education and science by stopping cuts and increasing funding. In addition, the new government plans to increase the compulsory education age from 16 to 18. How these policy changes influence the education level, know-how, well-being and equality of people in Finland remains to be seen.

4.5 Educational Inequalities in Spain

The debate on educational equality/inequality in Spain has a long way to go, both academically and politically. Since unprecedented educational growth began in the 1960s, much later than in other European countries, the school system has been subject to a strong tension between the expectations the different actors have of education and the capacity of the school institution to respond to these expectations. In social terms, school investment was used by the working classes as a social mobility strategy, and by the emerging middle classes as the key strategy for maintaining their social position. The elites responded by extending the educational pyramid to sustain their relative position.

In the 1970s and 1980s there was a broad consensus on the need to provide schooling for all children and adolescents in the 6–16 age group. Whether or not they would study the same curriculum was another matter, as will be discussed later. But schooling rates also began to grow in the pre- and post-compulsory levels, which introduced the question of inequality at these levels. In the 16–18 age group, school drop-outs were, and continue to be, more present among lower class children, which distances them from access to higher education and leads them to a

precarious labour market. Partly because of the pressure of the European Union's 2020 targets, the decline in what is now called early school leaving is a political objective that generates strong consensus in the educational community and in the political sphere. Another question is how to reduce this drop-out, curiously called premature, because it seems that normative schooling has to be extended to 18, 20 or even 24 years. It is not on the Spanish political agenda to extend compulsory schooling until the age of 18, as in some European or Latin American countries where it was introduced some time ago. The role of vocational training as a key strategy in reducing early school leaving will be discussed below.

The pre-compulsory level is also the subject of debate in academia and politics. There is already enough literature (Elango et al. 2016) pointing to a high correlation between early schooling and better outcomes at the end of compulsory education, as well as a lower propensity for risk behaviours. In Spain, the 3–5 age group has become practically universal, and the debate focuses on the 0–2 age group. The former has grown considerably in recent years, and in the current debate about the formation of the government in Spain, the extension and especially the public funding of this stage has been raised. The growth of what in Spain is called early childhood education has satisfied the demand of families with qualified jobs and high purchasing power, without entering too much into the educational quality of the centres. Working-class families have more traditional patterns, such as the withdrawal of the mother from the labour market or the use of community networks, with grandparents as caregivers for the youngest children. Increasing public funding for childcare facilities would render access to these facilities more equal.

Access to university is one of the focal points of the discussion on equity in the education system. In three generations, Spain has gone from having 5% of each cohort in university to 40%, which has generated wide debate on the widespread increase and/or democratisation of university. This widespread increase has two dimensions: the loss of educational quality due to the number of students per classroom, and the devaluation of qualifications. It has long been said in numerous forums that Spain has “too many” university students, but it is not clear how to reduce university admissions in a way that is not regressive from a social point of view, nor is it at all clear that wage devaluation is important enough to discourage middle-class and lower-class young people from going to university and seeking a supposedly better qualification in vocational training (Martínez 2017). With regard to democratisation, although it is true that there has been an increase in access to university for young people from lower classes, in recent years the difficulty maintaining the access rate has been highlighted, due to the economic downturn that began in 2008, which has led to an increase in university fees and a reduction in the average amount of scholarships, although it is also true that the opportunity cost has decreased due to the recession itself.

In order to understand the mechanisms of social inequality in access to different levels of education in Spain, we must take into account the centuries-old distinction between public and private schools. Due to the particularities of the social and political history of the country, the presence of the church in the field of education has been and continues to be very important. In compulsory education, there are three

types of centres: (a) publicly owned centres, financed by the state and managed directly by the various educational administrations; (b) state-subsidised private centres, which are privately owned centres, i.e. managed by private actors, mostly religious orders, but financed by the state to ensure the free compulsory stage; and (c) private centres, which are managed by private actors and financed exclusively by families. Needless to say, the latter are highly selective centres, some are the headquarters of educational multinationals (French secondary school or German school) and many have a conservative educational orientation, for example in the segregation of boys and girls.

In general, private charter schools are concentrated in middle-class urban areas, and in the poorest areas there is practically only public schooling. This leads to a key aspect of educational inequality, which is urban and school segregation. In cities such as Barcelona, the rates of urban segregation are very high, which means that the social composition of educational centres depends very much on the environment in which they are located. But there is also school segregation within the same territory, in which public schools educate the population with fewer economic or cultural resources, such as the population of foreign origin or cultural minorities. The question of how to reduce school segregation, especially at the local level, has been on the political agenda for years, but the redistribution of pupils classified as problematic is not easy when there is a deep-rooted culture of school choice that justifies precisely the existence of selective private schools. However, this great social segregation of educational centres is not accompanied by a great segregation from the point of view of competences; on the contrary, Spain is a country with a low level of segregation by competences between centres (OECD 2016). This invites us to think that the quality of schools is rather homogeneous and that the differences in results between private and public schools are due to the different socio-economic and cultural composition. The quality of the school infrastructure, the homogeneous processes of teacher training and the control of the Ministry of Education over the curriculum, could be producing an education that is rather homogeneous in terms of quality, didactics and content.

The presence of private providers in higher education had been symbolic until two decades ago. The university expansion of the 1980s and 1990s was mainly channelled into public centres, increasing enrolment and the number of centres, even in small cities far from the big capitals. However, from the first decade of the twenty-first century onwards, there has been a significant increase in the supply of private centres, both undergraduate and postgraduate, which has meant a social segmentation of university education. Beyond the private providers, there is debate about the privatisation of the public university, in a double sense: the management of higher education centres, increasingly oriented in business terms of accountability, and the subordination of curricula to the needs of the labour market. This point will be developed later in the analysis of education policies.

In addition to access, another focal point of educational inequalities is school performance. Traditionally these results were measured with notes and qualifications. Since 2003, with the appearance of the PISA report, there has been a paradigm shift towards the measurement of competences. In comparative terms, it is

easier to measure competencies than grades and degrees, which depend on the educational design of each country. It is known that the PISA tests measure competencies in mathematics, reading and science from a questionnaire answered by a sample of 15-year-old boys and girls. Of all the analyses carried out, two results can be highlighted for the Spanish case. The first is that Spanish students are below the OECD average. Although the distance from the average is small, the fact that it is located in the lower part of the ranking has had a very strong and negative impact on Spanish public opinion and the political agenda. The second is that there is a certain level of equity in the results; in other words, the distance between upper- and lower-class students (or socioeconomic status, in PISA terminology) is smaller than other reference countries such as Germany and the United States. It has also been criticised that the negative point of this egalitarianism is the excessive mediocrity of the results, and that the Spanish education system does not encourage excellence. Despite the success of this argument, what really happens is that students with a low social background achieve better results than in other countries, while those with a high social background have worse results, which explains both equity and the lower-than-average outcome.

One of the effects of the publication of the successive PISA reports has been to look for the countries with the best scores, especially Finland, and the formula for increasing performance in competences and for improving excellence. But the focus has been almost exclusively on the internal part of the education system, such as didactics, curriculum, teacher training and school management. Very little attention has been paid to the factors that explain much educational inequality, such as school segregation or the social structure itself.

In addition, notes and qualifications continue to be very important in Spain. Moreover, there is not a very strong correlation between results in PISA competencies and the degree that certifies passing compulsory school. For example, while the outcomes of competencies in PISA have remained stable throughout the economic cycle, early school leaving has a strong pro-cyclical behaviour, due to the fact that it varies in inverse function to youth unemployment. (Martínez 2019). The results of many investigations have shown that there is a considerable distance between grades depending on the economic and cultural capital of the families, and that even with equal grades, educational expectations are lower in lower-class families, and the propensity to drop out of school is lower in middle-class families, even if they have low grades.

The inequality of results translated into qualifications affects a field that is also subject to strong social inequalities: incorporation into the labour market. Despite all the discourses on the devaluation of qualifications and the distance between training and the needs of the productive system, all the statistics yield three persistent data: unemployment rates decrease as the educational level increases, the wage return increases with the educational level, and the over-qualification rate is relatively small. Of course, the economic downturn of 2008 has had a negative impact on these three indicators, but the gap between graduates and unqualified young people has widened (Martínez 2015). A relatively positive impact of the recession has been the increase in school retention or re-entry into the system, especially in

vocational training, by lowering the opportunity cost. And indirectly, the misnamed “NEET” group (youths who are not in Education, Employment, or Training) has reduced; a definition that has become a conceptual category and subject of public policies, in spite of its many conceptual and practical limitations (García Fuentes and Martínez 2020). But this category includes from lower-class girls who voluntarily or involuntarily withdraw from the labour market to middle-class boys and girls who take a sabbatical year, so it does not seem reasonable to use it as a sociological category or as a basis for the definition of public policies. In addition, statistics tend to overestimate the quantity of the phenomenon and the youthfulness of the collective.

Vocational training is deserving of a separate chapter regarding the transition from school to the labour market. Designed precisely as an interface between training and employment, vocational training in Spain has evolved due to tensions in both fields: the fit with the education system and the link with the labour market. As regards the fit with the education system, until the 1980s professional training had a very subsidiary character compared to academic training, and the selection between the two paths was made at the age of 14. In the 1980s, the idea of comprehensive secondary education came to the fore, after more than 20 years lagging behind the Nordic countries where the unified curriculum was most successfully applied up to lower secondary education. One of the most widely used arguments in favour of comprehensive reforms was precisely that early selection promoted the reproduction of social inequalities, and that highly segmented systems between baccalaureate and vocational training tended to reproduce initial class positions. The implementation of the comprehensive reform from 1990 onwards was very convulsive, for political and educational reasons. In the political field, the reform was driven by a social-democratic government that had an absolute parliamentary majority but encountered opposition from the conservative right that maintained a selective and meritocratic view of the education system. The political and social left was also opposed, seeing that the reform fell short of eradicating social inequalities through education. In the field of education, it soon became clear that a common curriculum is a very laudable objective, but difficult to apply in the educational practice of schools, due to the combination of three factors. First, a large proportion of the secondary teaching staff did not want or could not manage the new curriculum and the new didactic orientations derived from constructivism. Second, the dimension of young people who could not or did not want to study the same as all young people up to the age of 16 was not foreseen. Third, the majority expectation of families was that compulsory secondary education should prepare for the baccalaureate, and therefore the selective dimension prevailed over other pedagogical or social considerations. All of this led to “streaming” practices, the separation of groups by levels and curricular diversification, by means of facts in educational centres and by means of legislation in conservative government periods, which is why in Spain we can speak of a limited comprehensive secondary education. These imbalances led to an increase in education and in the inequality of educational opportunities by social origin (Fernández-Mellizo and Martínez 2017).

Another controversial point was the fit of vocational training with upper secondary education. With the idea of dissociating school failure from vocational training and increasing its prestige, even putting it on a similar footing to the baccalaureate, the 1990 reform imposed the same requirement for access to both the baccalaureate and vocational training: the diploma/graduate in secondary education. Higher vocational training for secondary school graduates was also created as an alternative to university. In practice, the image of the baccalaureate was reinforced, and inequalities in educational opportunities increased, since with increasing academic requirements, lower-class youth have fewer options (Martínez and Merino 2011). In recent years, there has been an increase in the number of connections between systems recovering from school failure and vocational training, which reinforces the image of the second path of vocational training but reduces the inequality between being inside and outside the education system.

In the labour and productive field, one of the main objectives of any educational reform is to bring professional training closer to the needs of companies and the productive fabric. In the reform of the 1990s, two important innovations were introduced in this vein. The first was curriculum design, which focused on specific competencies in the production or service sectors. The second novelty was the introduction of workplace training, or in-company internships, as it is popularly known. Although the Spanish business fabric has for centuries been distanced from the initial training of workers, data from some research point to a relative success in the placement rates and in the rates of adaptation from training to the labour market (Martínez García 2016). At the time of economic expansion the placement rate was so high that it was a reason for dropping out of school. For the management of the practices, collaboration networks have been created between training centres and surrounding companies, with the active involvement of the chambers of commerce. But even so, the discourse of the complaint about the inadequacy of vocational training has not diminished. Since 2012, dual vocational training, clearly inspired by the German model, has been promoted. It could even be said that more than inspiration it is a matter of directly imitating the Germanic model, even if only the device and structure of the training is copied, without copying the administrative, working and cultural environment. Some recent research is yielding uneven results from dual training in Spain, as it is only being developed in very specific sectors, multinational automotive companies or agro-industry, and is also very selective with the students who enter, so a higher placement rate would have more to do with this selection of students than with the benefits of the dual training model.

4.6 Brazil: A Maxi Educational Inequality

In the last 20 years, sociological and demographic studies have documented remarkable progress in enrolment rates in the Brazilian education system. This expansion began in the 1970s at all levels of education, from early childhood to higher education. As a consequence, as in other countries, there has been an increase in the

education of the Brazilian population (Hasenbalg and Silva 2003; Arretche 2015). Under the influence of the human capital theories of the 1960s, education, or rather the level of education, became the object of study for economists, influenced by the theory of human capital. From an instrument for the promotion of citizenship, education is now conceived as an instrument for the economic development of the country (Almeida 2008).

In a predominantly agrarian country of continental size, the main educational challenge of the 1960s was to reduce illiteracy and ensure access to primary school. In large Brazilian cities, access to school had become a reality since the early decades of the twentieth century. In rural areas, schools were scarce and required long walks. There was a shortage of schools, well-trained teachers and high failure and drop-out rates. In general, these conditions did not facilitate access to school for the poor, who live both in the countryside and in the big cities.² The establishment of compulsory education in the national territory took a long time to materialise (1934) and the generalisation of access to basic education was even later (1990). These are milestones in the slow construction of the education system in the country which contribute towards explaining the late development in comparison with the countries of Western Europe and some Latin American countries, such as Argentina, Chile, Uruguay, etc. (Almeida 2017).

Today, 96.5% of Brazilian children between in the 7–14 age group are enrolled in school. Despite remarkable progress in recent decades, access to early childhood and secondary education is far from satisfactory. 54% of children in the 4–6 age group (Schwartzman and de Moura Castro 2013) are enrolled in nursery school. The national net secondary school enrolment rate reached 56.9% in 2015. To grasp the evolution of access to the final qualifications of the education system, we must bear in mind that in 1980, the same rate was only 14%. In part, national school enrolment rates remain low today because of the strong regional inequalities characterising the country. This is contrary to the more developed regions of the south and southeast to the north and northeast of the country. In Pará, the country's northern province, by 2015, 44% of the population aged 15–17 was in secondary school. In the same year, in São Paulo, a rich province in the south of the country, 73% of young people of the same age enrolled in this level of education. Therefore, national averages hide very different situations that vary significantly between different regions of the country and between different social groups.

For the Brazilian generations born up to the 1970s in the lowest extracts of the social structure, the absolute priority was work and survival (Linhares 2008). Secondary schools were scarce and for a long time were in the hands of private companies and concentrated in the big cities. Primary school failure rates, in turn, contributed to dropping out of school before reaching secondary school (Costa Ribeiro 1991). In 1985, when Brazil sought to deepen its democratic experience

²Even the cost of shoes was an additional difficulty for poor people living in the cities and countryside. Studies on the history of Brazilian education document this reality well. Hygienist principles guided the management of the Brazilian state. In this context, the barefoot child was seen as a potential transmitter of diseases. Consult, for example, Silva (2018).

after the military dictatorship, policies were implemented to curb school failure. These pedagogical devices that led to the decline in school failure have become conditions for international agencies, such as the World Bank, to provide funds. As expected, when failure rates declined, dropout rates also declined. This led to the influx of a larger contingent of young people into secondary school. According to IBGE (2020), in 1980, the net rate in national secondary school was 14.1%. In 2000, the same rate jumped to 33.3%. As a result, the formation of greater demand for higher education doubled in the 2000s.

4.6.1 A Triple Segregation

However, expanding access to Brazilian schools was not enough to reduce educational disparities, as it was done through very unequal school structures. Among the objective and symbolic subdivisions of the Brazilian education system, one of the main ones is the segmentation between public and private education. Official statistics, although imperfect, serve to scale the problem. Even today, approximately 80% of the Brazilian school population is enrolled in public schools. However, this 20% of students from private schools ended up occupying 60% of seats in prestigious Brazilian public universities. In careers such as medicine, engineering and law, the proportion of private school students was even higher. Unlike Finland, in careers leading to teaching, school competition for entrance exams is less severe, resulting in a more popular student audience. Recent educational policies, such as the Quota Law (2012), sought to change this situation by instituting a reserve of half of the places in federal public universities for public school alumni. These educational policies of recent years have contributed towards reducing educational inequalities, although they have not been sufficient to eliminate them. Numerous studies recognise that the social position of families, geographic origin, gender and skin colour condition access and orientation within the Brazilian education system, from primary school to higher education. The possibilities of transition from one school cycle to another are extremely unequal if we look at the quartiles of income of the school population (Montalvão and Arnaldo 2014).

In Brazil's large urban centres, this reality is even more evident. There is a strong social and school segregation similar to that observed in many other cities of the world (Oberti 2007; Merle 2012). This school segregation reflects the distribution of social inequalities in the geographical space of the cities within the school. In Paris and Barcelona, the composition of the students of each school varies according to the neighbourhoods. This situation gave rise to the combination of residential and educational strategies of middle-class families and elite groups.

In the Brazilian case, the same phenomenon can be observed, significantly amplified by the financial-based segregation operated by private education. The demand for private education consists predominantly of middle- and upper-class families in large urban centres. In addition to this double social and school segregation, recurrent in so many other national contexts, in the Brazilian case there is also

segregation at the academic level. School performance is much higher in private education compared to that observed among non-critical students in public schools. For example, in the city of São Paulo, of the 200 schools with the highest performance in the National High School Exam (which corresponds to secondary school), only nine are public schools (Perosa and Dantas 2017). With few exceptions,³ it appears that Brazilian private schools, although quite heterogeneous, have the monopoly of school excellence in the country (Almeida and Nogueira 2002). Even if we consider that the parallel universes of public and private schools are internally heterogeneous, when one observes the distribution of grades in the National Secondary School Examination (ENEM) at the end of secondary school, the performance of private school students is much better than the performance of public school students. A minority of public secondary schools, to which access is mediated by selective entrance exams, presents the best school performance in the ENEM. Even so, they only represent 5% of the highest performing secondary schools in the country.

Brazilian public schools are home to families with fewer economic and social resources. These school structures suffer serious problems: teachers with low salaries, double or triple work shifts, large numbers of students per class. In the vast majority of cases, especially in large cities, such teaching units operate in three shifts of four to five hours in the mornings, afternoons and evenings. They bring together students between the ages of 7 and 14 and sometimes include students between the ages of 15 and 17 in the same school buildings. In the evening (from 7 p.m. to 10:30 p.m.), secondary education and adult education structures are held, even today, and are decisive for the reduction of illiteracy levels in the country and for the resumption of early interrupted education. Very unfavourable teaching and learning conditions predominate, the effects of which are felt in school performance. This is in stark contrast to the protected universe of private schools.

Historically, private education in Brazil grew with the arrival of Catholic religious orders, mainly from Europe. Thanks to Brazilian legislation and at that time, the state subsidy, huge educational efforts were made, aimed at ensuring the material survival of these orders in the country (convents, seminaries and private schools). This movement began at the end of the nineteenth century and in the first decades of the twentieth century. At that time, denominational schools and secular private schools run by European immigrant groups (Italians, Spaniards, French, Germans, etc.) gave rise to a solid school market, in which monthly fees can reach 1000 American dollars per month. The supply of private schools is rich and varied, with secular or religious schools, bilingual schools, with considerable variations in the pedagogical framework. They provide a tailor-made education that varies according to the economic and cultural resources of the different elite fractions (Nogueira 1998; Almeida 2009; Perosa 2009).

³The exceptions correspond to public secondary schools that hold an entrance examination and therefore select their audience from the school and social point of view (Basilio 2016).

In the case of Brazil, the core subjects for all students finish prior to entering secondary school (aged 15). Vocational schools were phased out in the public sector, partly because of criticism that it was a lower education than regular secondary school. Today, vocational training at secondary level is dominated by private initiative and schools run by employers' associations. This vocational training enjoys great prestige among the families of the popular groups and tends to be avoided by young people with higher incomes and education levels (Tomizaki 2007; Schwartzman and de Moura Castro 2013).

Finally, public vocational training schools are today limited to Federal Institutes (IF), distributed across the country. To enter these vocational training institutes, students must sit school exams of varying degrees of selectivity depending on the location of the establishment. The Brazilian provinces have similar public and free vocational schools, of a good educational level, but they are quite selective. Part of the vocational training at secondary level is dominated by private initiatives and schools managed by employers' associations. This vocational training is renowned among working class families and it must be avoided by youths with levels of higher education (Tomizaki 2007; Schwartzman and de Moura Castro 2013). In general, vocational education has lost its prestige and the aspiration to go to university has become standardised. In this regard, the existence of a mass of private education establishments offering low-cost night courses, and sometimes distance courses, contributes to the hope of entering higher education. It is important to note that in a country whose population has a relatively low education level, despite the notable progress made, the rate of return of the higher education diploma is quite high (Almeida and Ernica 2015).

4.6.2 Higher Education in Brazil

Higher education in Brazil can only be understood in the context of the long history of the country that dates back to the condition of slave colony until the end of the nineteenth century. More recently, between 1960 and 1970, the country experienced strong economic growth combined with growing social inequalities. In the 1990s, a neoliberal agenda prevailed in the country (privatisation, precarious working conditions, reduction of the state, etc.). In this decade, however, there was widespread school education and control of inflation, a necessary condition for growth in the following years. The decade of 2000, on the other hand, was marked by the arrival to power of progressive and singularised political forces, and by years of economic growth combined with the reduction of social inequalities. That was until 2014, when the country entered a deep economic recession due to strong political conflicts that culminated, politically, in the dismissal of President Dilma Rousseff. The economic recession meant social inequalities have grown again (Carvalho 2018).

The impacts of social inequalities on educational processes are widely recognised in specialised literature. As Christian Baudelot and Roger Establet (Baudelot and Establet 2009) argue, all over the world, without exception, student

achievement is associated with the socioeconomic level of their families. However, the intensity of this phenomenon varies substantially. In Finland, South Korea and Japan, this intensity is discrete.

Historically, Brazilian higher education was destined to the elites. Unlike the Spanish colonisation, which established universities in its colonies from the sixteenth century onwards, the Portuguese Crown prohibited the installation of universities in Brazil (Cunha 2016). At that time, a policy of granting scholarships to Brazilians who were entitled to enter the University of Coimbra was chosen.⁴ Sixteenth-century Spain already had eight universities. In comparison, Spain had a much higher literate population than Portugal. While Madrid could send teachers to the colonies without the risk of compromising its own universities, the same was not true for Portugal (Cunha 2016). Without attempting to reconstruct this long-term history, it is important to mention at least two waves of enrolment growth in higher education.

The first wave of expansion of higher education took place between 1960 and 1970, with an increase of 500,000 university students in the country. In Brazil, as in other countries of the world, these years were also characterised by the feminisation of the student population (Barroso and Mello 1979; Baudelont and Establet 1992). That number doubled again between 2000 and 2010. Its main characteristic was the arrival of women to university, in general, concentrated in “female careers”, such as education, psychology, nursing, etc. The second wave of expansion in access to higher education in Brazil increased the entry of young people from families with low socioeconomic levels, thanks to an expansion programme in public universities that took place between 2003 and 2014. Many of these new universities were created in the north and northeast, far from the big cities, with the objective of promoting the access of segments of the population who until now had not been able to access university. Since 2012, the Quota Law has been in force, which reserves 50% of the places in federal universities for students from public, low-income, black and Indian schools.

Although the expansion of Brazilian higher education was remarkable in the twentieth century, after a movement to spread global education, enrolment rates are still far below those of other countries, including Latin American countries. Between 2000 and 2010, Brazil’s net rate of access to higher education doubled. However, it started from a very low level and even after the progression of the last three decades of the twentieth century and the 2000s, in 2018, the net rate of access to higher education in Brazil was 18.7%, being quite unequal among the different regions of the country. If we look at the distribution of these rates among social groups, the maximum inequality characterising the country’s education system becomes even more evident. The evolution of enrolment rates among the population between 18 and 24 years of age indicates that, in 2001, 20% of the population with the lowest income represented only 0.5% of enrolment in higher education, reaching 4.2% in

⁴When the Portuguese arrived in Brazil, Portugal had only two universities, the University of Coimbra (1290) and, later, the University of Évora (1559) (Cunha 2016).

2011, and among the richest 20% in the same period, this rate went from 22.9% to 47.1%; similarly, the proportion of private sector enrolment was also much higher: this sector represents 75% and the public sector only 25% (INEP 2012).

According to UNESCO, in the last decade, Brazil has improved the proportion of the population between 25 and 34 years of age with higher education by 10 percentage points, from 11% in 2008 to 21% in 2018. Unprecedented educational policies developed in the 2000s, combined with a period of economic growth and reduction of inequalities, help to understand the greater investment by young Brazilians in extending schooling. The Quota Law (2012), on the other hand, by reserving half of the places in federal public universities for public school graduates, the population with the lowest socioeconomic level and blacks contributed significantly to reducing educational inequalities, although they still remain quite high.

4.7 Conclusions

To conclude, we present a brief summary of the educational results of each country and a general comparative assessment.

Since the early twentieth century the education level of Finnish people and particularly women have risen constantly. Today, women's educational level exceeds that of men and the majority of students in higher education and of university graduates are women. Compared to other European countries and other Nordic countries, women's attendance in higher education has a longstanding tradition in Finland.

The principal idea in the Finnish education policy has been to provide education to all regardless of their social origin, place of residence or gender. Educated citizens have been seen as a fundamental factor in nation building, development and modernisation of the society, a source of societal and individual well-being and as a producer of economic competitiveness.

The Finnish education system has been very successful. People in Finland are among the most educated people in the world. An average person in Finland is expected to undertake around 20 years of education, which is 3 years more than the European average (Statista 2019).

However, neoliberal tides in education policies have generated concerns about the equality of education in Finland. First, education level and choice of educational careers have become increasingly hereditary resulting in a halt in social mobility. Second, market-oriented education policies and reforms that emphasise personalised learning paths and expect pupils and students to be self-directed in their studies combined with severe budget cuts has increased inequalities among pupils and students. Not all have equal abilities to be self-directing and there is not enough personalised support for those who have challenges in learning, in language skills, cultural competences or social support. Significant differences exist in attitudes towards education, in learning opportunities and outcomes e.g. between boys and

girls, between original population and immigrants and between students in vocational and upper secondary education.

In the Spanish case, some fundamental questions are pointed out in the debate on educational policies in the management of social inequalities. It can be said that the political debate is situated in two axes, which we can call the axis of quality versus equity and the axis of citizenship versus human capital. To express it in schematic terms, the left-wing political and social bloc would commit to equity and citizenship, and the conservative socio-political bloc would commit to quality and human capital. Although with many nuances, which are beyond the scope of this text, these are the fundamental debates that also govern international bodies such as the OECD and the European Union, and the reforms and educational proposals emanating from these bodies. Some voices suggest that equity and quality can be achieved at the same time, but in practice demands for educational quality implicitly or explicitly lead to a reduction in equity at different levels of the education system. It is also true that there is no consensus on what equity and quality mean, let alone how they are measured. But in general, when equity in access is emphasised, for example, in the university, it is assumed that overall results may fall, which is one of the quantitative indicators of quality. And when higher quality is demanded in schools, it is implicitly or explicitly assumed that they have to be more selective, at least from the point of view of skills. It can be seen that quality and equity are not trade-offs, but they go hand in hand (OECD 2016). This is due to the fact that the weight of social origin is still so high that when the performance of students of low social origin is compensated, the average of the population improves, without affecting students of high social origin (Martínez 2017).

The second axis is the updated version of the school tension derived from the tension between capitalism and democracy, which has already been highlighted by thinkers such as John Dewey and the neo-Marxists Bowles and Gintis (1976) in the United States, or Carlos Lerena (1986) in Spain. The intersection between the social function (learning in a democratic, participatory and formally egalitarian context) and the economic function (learning for productive and selective performance based on capabilities) crosses educational policy debates, from basic education to higher education. Lower secondary education is where tensions and contradictions are most concentrated, since it is the link between basic and higher education in which students are obliged by law to remain in a unified school. But the liberal discourse of entrepreneurship and non-cognitive skills as new labour demands is permeating basic education. And at the university level this tension has generated student movements complaining about the progressive privatisation of university education, especially with the application of what is known as the Bologna process in the second half of the first decade of this century. However, it is paradoxical to claim for the university a space protected from knowledge not contaminated by spurious and materialistic interests, and at the same time increase concern for the future of the graduates, a future in which young people with less social capital will have fewer opportunities.

In a country like Brazil, made up of enormous geographic distances and a high concentration of income, the inequality in education has been historically very high.

This inequality has grown more since 2016, when the country plunged into a strong economic recession.

Since the 1980s, with the fall of the country's military regime, several educational policies have been applied with some success. The generalisation of access to primary school in the national territory was undoubtedly the first, as well as the increase in the compulsory school age, which since 2016 has been changed to 6 years. As a result, improvement can be observed in the main educational indicators of the country: reduction of illiteracy and the failure and dropout rates, increase in the educational level of the population and growth of the secondary school population. Educational inequalities lie less in the old division between "educated" and "uneducated" (Ringer 2003) and mainly in the orientation within the educational system. Leaving school to work, looking for a professional course or entering higher education are decisions that are far from being distributed randomly throughout the social structure.

The problems are complicated in secondary education and with considerable variations from the north to the south of Brazil. School dropout and work priority persist. The school offer in secondary school is guaranteed by public and private schools with quite uneven academic performance. In the big Brazilian cities, a segregation situation prevails: social and geographical, school and academic. Even vocational education is offered by very heterogeneous public and private institutions. There is porosity between professional and university education, accompanied by an overvaluation of the diploma of higher education. Many young people turn to good public vocational schools to prepare to enter higher education.

The rate of young people with higher education almost doubled between 2008 and 2018 and today 21% of the population aged 25–34 have higher education. This rate varies greatly between the north and the south of the country. However, the increase in access to Brazilian higher education is due less to these educational policies aimed at promoting greater educational equity and more to the privatisation of Brazilian higher education. This is because more than 80% of higher education students in Brazil are enrolled in university centres, colleges and private universities. Public higher education is scarce. In 2015, 24% of university students were studying at a public university (Perosa & Costa 2015). The great majority of young people access private higher education, composed of institutions maintained by large business groups or smaller colleges that attract the student population by offering evening courses, educational credit and, in many cases, thanks to distance learning.

The population with the lowest financial resources is targeted by private higher education, and their qualifications are strongly devalued in the labour market. The Brazilian case teaches that educational inequalities can be reduced as a result of educational policies clearly aimed at promoting equity. They are willing to mobilise all means and instruments to offer equal tools to young people for competition in the education system. More collective and solidarity-based forms of school competition have been reinvented, the greatest example of which was the Quota Law (2012), which allowed many children of domestic workers to have access to the most prestigious higher education diplomas.

The three countries selected show us three very internally complex and heterogeneous contexts, as well as contradictions and permanent reforms of their educational systems. In a first quantitative approach each country can be placed in a continuum of the education system that goes from most successful in terms of reaching a high level of education all across the population, in conditions of equity and facilitating youths' incorporation into the labour market, to least successful, with Finland and Brazil occupying either end of the spectrum respectively and Spain occupying an intermediate situation. Despite these differences, the three countries share certain tensions in their education system. On the one hand, the conception of education, ranging from more utilitarian, human capital theories, to the more humanist and civic-minded perspective. On the other hand, the challenge of comprehensiveness; in other words, the balance between a homogeneous education and a diversified education, between vocational training and a more academic path. In addition, there is the challenge of improving education while also improving equality.

The tensions differ from country to country, since their education traditions and cooperation and conflict strategies between the education agents vary, with varying levels of resources and different alliances with political actors.

Lastly, the global perspective of the three countries also serves to observe the level of discussion and variation in the consensus about the education system over time. Brazil represents an initial phase, with some setbacks, which, for example, have already been overcome in Spain (during the Franco dictatorship). Finland stands as an extreme case of an example to follow to reach the maximum education levels. However, it also demonstrates that the conquests and wide consensus attained by citizens can also be destabilised by educational reforms that introduce individualised principles instead of continuing to underscore criteria of collective equality criteria.

Appendix

Table 4.3 Trends in educational attainment at age 25–34, by gender (2008–2018)

	Below upper secondary						Upper secondary or post-secondary non-tertiary						Tertiary					
	Men		Women		Total		Men		Women		Total		Men		Women		Total	
	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018
Notes	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)
OECD																		
Australia	18	12	17	9	18	11	45	44	36	32	40	38	37	44	48	59	42	51
Austria	11	12	14	11	12	11	58	52	51	44	55	48	31	36	34	45	33	40
Belgium	20	16	14	13	17	15	44	44	37	32	41	38	36	41	48	54	42	47
Canada	10	7	6	5	8	6	42	40	30	25	36	32	48	53	63	70	56	62
Chile		16		13		15		53		50		51		30		37		34
Colombia		33		26		30		42		41		42		25		33		29
Czech Republic	5	6	6	7	6	6	79	68	74	53	77	60	16	26	20	41	18	33
Denmark	22	20	20	13	21	17	45	41	40	31	43	38	32	39	40	56	36	45
Estonia	17	15	13	9	15	12	53	51	45	37	49	44	30	34	42	54	36	44
Finland	12	11	8	8	10	9	59	56	44	42	52	49	29	34	48	50	38	41
France	18	14	16	12	17	13	45	43	39	37	42	40	36	43	45	51	41	47
Germany	14	14	15	12	14	13	63	55	60	54	62	55	23	31	25	34	24	32
Greece	30	15	19	11	25	13	45	50	48	38	47	44	25	35	32	51	28	43
Hungary	15	13	14	13	14	13	66	62	58	50	62	56	20	25	28	37	24	31
Iceland	31	24	26	14	28	19	40	37	36	29	38	34	29	39	39	56	33	47
Ireland	19	9	12	6	15	8	43	39	36	34	40	36	38	52	52	60	45	56
Israel	15	9	10	6	13	8	49	53	41	36	45	44	36	38	49	58	42	48
Italy	35	27	27	21	31	24	49	51	49	45	49	48	15	22	24	34	20	28
Japan																		
Korea	3	2	2	3	2	2	41	34	38	22	40	28	56	64	60	76	58	70

(continued)

Table 4.3 (continued)

	Below upper secondary						Upper secondary or post-secondary non-tertiary						Tertiary					
	Men		Women		Total		Men		Women		Total		Men		Women		Total	
	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018
	Notes (1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)
Latvia	24	16	14	9	19	13	55	54	49	37	52	46	21	30	37	54	29	42
Lithuania	16	8	10	5	13	7	50	45	41	30	45	38	34	47	50	65	42	56
Luxembourg	22	13	20	13	21	13	44	35	38	30	41	32	35	52	43	57	39	55
Mexico	65	51	65	49	65	50	19	27	19	27	19	27	17	23	16	24	16	23
Netherlands	20	15	16	11	18	13	43	42	42	37	43	40	37	43	42	52	40	48
New Zealand	23	15	19	12	21	13	m	45	m	37	m	41	m	40	m	51	m	46
Norway	18	20	13	15	16	18	45	39	32	29	38	34	37	41	55	56	46	48
Poland	8	7	6	4	7	6	66	59	55	42	61	51	26	34	39	54	32	44
Portugal	60	36	47	22	53	28	23	39	24	34	23	36	17	26	30	44	23	35
Slovak Republic	5	8	6	8	6	8	79	62	73	47	76	55	16	30	21	45	18	37
Slovenia	9	8	6	4	8	6	68	63	56	43	62	54	22	30	38	53	30	41
Spain	39	38	29	27	34	32	26	24	26	23	26	23	35	38	45	50	40	44
Sweden	10	19	8	15	9	17	55	40	46	30	50	35	35	40	46	55	41	48
Switzerland	8	8	11	6	10	7	50	43	53	40	52	42	42	49	35	54	38	51
Turkey	54	40	66	45	60	43	29	27	20	21	25	24	17	33	14	34	15	33
United Kingdom	19	17	20	13	20	15	38	35	35	33	37	34	42	48	44	54	43	51
United States	14	9	10	6	12	8	49	47	44	40	47	43	37	45	46	54	42	49

Table 4.3 (continued)

	Below upper secondary						Upper secondary or post-secondary non-tertiary						Tertiary								
	Men		Women		Total		Men		Women		Total		Men		Women		Total				
	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018	2008	2018			
Notes	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)			
OECD average	21	17	18	13	19	15	49	46	43	36	46	41	31	38	40	51	35	44			
EU23 average	20	15	16	12	18	14	52	48	46	38	49	44	28	36	38	50	33	43			
Partners																					
Argentina	m	32		m	24		m	33		m	31		m	34		m	45		m	40	
Brazil	54 b	37	47 b	28	50 b	33	37 b	45	41 b	47	39 b	46	9 b	18	13 b	25	11 b	21			
China	4	m	63		m	64		m	19		m	18		m	18		m	18			
Costa Rica	62	54	54	48	58	51	16	21	17	21	16	21	23	25	29	31	26	28			
India	5	m	58		m	64		m	26		m	22		m	16		m	14			
Indonesia	1	72 b	48	75 b	51	73 b	21 b	37	17 b	31	19 b	34	7 b	14	8 b	18	8 b	16			
Russian Federation	1	m	5	m	3		m	39		m	27		m	56		m	70		m	63	
Saudi Arabia		m		m			m		m		m		m		m		m		m		
South Africa	28	21	25	15	27	18	68	74	71	79	70	77	3	5	4	6	3	6			
G20 average		m	27		m	26		m	40		m	37		m	35		m	41		m	38

Source: <https://doi.org/10.1787/888933976365>, OECD (2019)

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Chapter 5

Digital Revolution and Sociocultural Change



Fausto Miguélez, Jordi Planas, and Paulina Benítez

Abstract The title of this chapter refers to how current developments in technology are not just one further innovation of the industrial era, but will lead to decisive changes in production methods, markets, labour, consumption and, to a considerable extent, personal and social relationships. But these changes will be happening within the economic and political framework of the period prior to digitalisation and will persist in the globalisation of the economy. These pages will focus on what we believe to be key issues: changes to business and work, changes to the education and training of people in general and the active population in particular, and certain activities that will have a profound effect on the way we communicate and relate to each other.

No technological innovation, not even this one, exists and acts in isolation from the socio-political framework. Therefore, it is also important to analyse the policies and strategies that might lead the digital economy in one direction or another, towards an increase in inequality or in welfare. Going further, what our analysis does not cover is how the digital revolution could be of great help to curb the climate crisis, with changes in energy production, mobility, construction and protection of the environment, provided there is political will and consequent action.

Keywords Digital revolution · Lifelong learning · Work changes · Sociocultural changes · Technology

F. Miguélez (✉)

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: Fausto.Miguel@uab.cat

J. Planas

Grupo de Investigación en Educación y Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: Jordi.Planas@uab.cat

P. Benítez

Departamento de Trabajo Social, Universidad de Concepción de Chile, Concepción, Bio Bio, Chile

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5.1 Introduction: The Role of the Digital Economy and Policies to Universalise Its Positive Effects

The digital economy, together with the digital revolution (the so-called fourth technological revolution), is here to stay. It is a process that began several decades ago and that shall continue for many more. This economy will coexist alongside the traditional economy, although the former will use increasingly more digital instruments. This has been the case with all technological changes ever since the first industrial revolution. By ‘digital economy’ we mean that which is mainly based on such instruments as the internet, robotics, big data and artificial intelligence, and which partly dematerialise the economy and partly base the production of goods and services on these digital skills and tools. It is so strong that to a greater or lesser degree it will eventually permeate most economic activities and many other aspects of everyday life.

Some research (Frey and Osborne 2013) has raised alarms by pointing out that in many countries more than 40% of jobs are at a high risk of disappearing in a few years due to the emergence of the digital revolution. A few years later, other studies (Arntz et al. 2016) reduced this destruction, for OECD countries, to percentages of no more than 12%. The differences have to do with the methodology used: the former analyse the basic tasks of professions while the latter refer to the basic tasks of jobs, which leads to the assumption that digital technologies transform jobs by replacing certain tasks with others. From further research (Deloitte 2015) it can be deduced that new fields are appearing in human activity and everyday life that are giving rise to new jobs and new occupations, mainly in the broad services sector. All of these will be affected to some degree by digitalisation, and it is difficult to make any accurate predictions in this respect.

The digital economy will have a major impact on business organisation and employment: it will eliminate some jobs and create others, and to a varying extent all kinds of jobs will be affected in some way. The conditions will not necessarily be better, and they may become worse. The reason is that technological innovation occurs, as it always has done, in a specific context of social-labour relations that may be more or less regulated, and which is both national and global. This conditioning of social relations is what leads us to believe that social and political action can somehow guide the technological revolution to ensure that it is beneficial, because it is not a blind force. However, globalisation will make socio-political intervention more complex at the level of each country. The digital revolution will also influence everyday life (leisure, consumption, lifestyle, education and training, mobility, homes), of course again not mechanically, but in a way that can be governed, if people are properly prepared, to ensure that it contributes to better rather than impoverished lives. This chapter therefore pursues two goals: to evaluate how, hypothetically, this economy, basically in the fields of employment and everyday life, will evolve in the ten countries of Europe and Latin America that we compare, and what political and social instruments can influence said evolution to ensure that welfare becomes more widespread.

Society and politics can influence the digital economy in two ways: on the one hand, by deciding on the use and distribution of the financial surplus generated by technological change and on the other by improving the labour market, both in terms of demand (companies and administrations) and offer (workers and people) and improving living conditions. In the former case, there is need to design tax reforms and welfare policies to redistribute the surplus and for administration to play a key role in modernising the country's productive structure: technology, energy, stimulation of small and medium enterprises, and the blurring of regional differences and digital divides (by gender, age, class and region). In the latter case, people need to be prepared for work and for life, with a different kind of education both initially and also in terms of lifelong training. Also with regard to the offer, issues that need to be addressed include working hours (reducing them if the general system is more productive), structural unemployment, which will be high, the guarantee of workers' rights, and the possibility of representation for workers in digital-based companies and administrations that will be organised in radically different ways. Digitisation will influence many other aspects of everyday life and social relationships, and society will therefore need to work hard to prevent exclusion.

One characteristic of the digital revolution, with respect to the past, is that asynchrony will increase, as it has done in previous revolutions. This refers to the differing rates at which the supply of and demand for work evolve, due to people living longer lives and the stage of those lives also being prolonged; on the one hand, schooling and training prior to or during access to employment, independence from the family, reproduction and care for dependent persons, active presence in the labour market, other life experiences; on the other, the speed of the changes that condition the demand for work (technologies, globalisation, organisation of production). In other words: the speed at which labour is reproduced is much slower than the changes to production and the distribution of goods and services (Vinokur 1998).

5.2 Methodology: Advantages and Limitations of a Comparison Between Countries

What we intend to do in this text is to address the issue of the digital revolution and socio-cultural change in a comparative manner between European and Latin American countries involved in the INCASI project, five from each continent (in Latin America: Argentina, Brazil, Chile, Mexico and Uruguay and in Europe: Spain, Finland, France, Italy and the United Kingdom). And from three angles of observation: (a) business, employment and everyday life, (b) the relationship between education and work and (c) consumption and social relations.

To do this we propose a dual strategy. On the one hand, to avoid speculative views of the future, we shall begin from the changes affecting the future that began years ago and are still happening today, for which we shall have to identify, for each of the topics, those aspects that we have already lived and that we know about, and that we believe foretell what might happen in the future, considering that the digital

revolution already began several years ago, but could get faster in the near future. On the other hand, the comparative nature of the text will require identification of the indicators of those anticipatory behaviours and events that we discussed in the previous section and that are available in a comparable manner. To do this, we must turn to publications of these indicators by international organisations where, albeit partially, European and Latin American countries are represented, i.e. OECD and ILO publications. The advantage of a comparative approach is that we are speaking of the countries involved in the INCASI project and aiming to capture their heterogeneity, while the main challenge is to reduce that heterogeneity to a small number of quantitative indicators for which, moreover, in some cases, we have no recent statistical information with which to compare.

Our goal is modest. We merely seek to collect some indicators on the set of countries considered. These indicators should allow us to make some progress with comparison of the digital revolution and socio-cultural change in different countries. In short, the work we present in this text has been conducted in three stages: (1) Identification of the phenomena that foresee future changes in the digital revolution and social change in the three aforesaid areas, (2) definition of the indicators we can use for comparison between countries and identification of the sources that could provide information on them and (3) a comparative assessment based on the aforesaid that can offer clues as to the diversity of processes in different countries, even though the comparison is based on a limited sample.

5.3 Changes to Businesses, Employment and Everyday Life

5.3.1 In Businesses and Employment

Faced with the challenge of the digital revolution, Spain obtains good results for internet connection and electronic administration, although with territorial differences, particularly between urban and rural area, with regard to the formers. But the country's position is weak in terms of qualified human capital in digital skills and in the use of digital technologies by small and medium enterprises, particularly in purchases and sales (*Índice de Economía y Sociedad Digital -DESI- 2018*; Ministerio de Industria, Energía y Turismo 2017; Ministerio de Hacienda y Administraciones Públicas 2016). Nor do small and medium-sized companies perform particularly well for training in ICT skills, which shows that they do not use them much in their activity. Here lies the great problem and the great challenge for the future, because these amount to more than 95% of the companies in the country, meaning that Spain appears weakly equipped to face the challenges of the digital revolution. Other EU countries that we analyse, like Finland and the United Kingdom, are in a better position, while Italy is in a worse situation and France is in a similar one. We do not have similar indicators for Latin American countries, although those used in Sect. 3.2 lead us to assume that these countries, perhaps with the exception of Chile in some aspects, are more poorly positioned than European countries.

This must be taken into account to understand the changes that are taking place in companies, partly as a result of technological innovation, partly due to changes in organisational methods. It is leading to smaller production and service centres, although large companies continue to increase in size, and to some extent there is a blurring of formerly clear boundaries between sectors and subsectors, leading to multi-sector companies. But, as far as employment is concerned, digitalisation is giving rise to two types of transformation (Lopez Sintas et al. 2018). The first is that routine jobs are replaceable by robots, which can work alone or do so in the company of humans. This routinisation is advancing from manual tasks to more intellectual ones. Lladós (2018) presents highly illustrative data in this regard, comparing Spain with the EU average to show how the former exceeds the European average in manual tasks and personal care and services, as well as in routine work, but is below average in intellectual, educational and coordination tasks, as well as in ICT, which represents a risk for medium-term employment. Latin American countries may well be closer to Spain than the European average, but we do not have comparable data. The second refers to the organisation of labour, i.e. the coordination of the work done within the company, and relations with suppliers and customers, who are being partly replaced by digital platforms, which in turn outsource to smaller companies, examples being Uber, Amazon, Glovo, Deliveroo and Airb&b. This is happening both in the European Union and in the global economy, although the differences have a lot to do with the technological might and strategies of small and medium enterprises in each country. The presented changes can influence employment in the ways mentioned in the introduction, i.e. destruction, creation and transformation, but there are notable differences by country, mainly related to the productive structure: if it is less technological, there may be a greater risk of human labour being replaced by robots or connections to online systems. But at the same time, we also need to take into account the strategies employed by companies, since in certain cases (e.g. Spain and Latin American countries), the low wages and high flexibility of labour (heightened in Latin America by informal work) in comparison to many other European countries may mean that robotisation is not profitable, at least not for the time being.

The risk of job loss, measured by various indicators (Table 5.1), differs among the countries that we are comparing because the digital revolution is advancing at different rates, although all of them are conditioned by their position in the global economy, since they are not only competing with technology, but also with other labour costs, tax regimes and other factors.

Only the last available year has been used in order to eliminate, as much as possible, the effect of the economic crisis on EU countries, since almost all of them (the exception is unemployment in Spain) are returning to the 2008 rates. However, two conclusions can be drawn from these indicators: that poor quality jobs (underemployment, informal employment) are the norm in many countries, with or without digitalisation, although the latter is much more frequent in Latin American countries; and that the risk of loss of the most routine jobs (unemployment, which is higher among people who perform low-skilled tasks and, in part, underemployment) is high in all Latin American countries, Spain and Italy, probably due to their

Table 5.1 Risk variables of job loss or precariousness, 2018

	Under-employed people	Unemployment rate			Informal employment ^a	
		Total	Men	Women		
Uruguay	20.4	8.0	6.5	9.7	Uruguay***	33.2
Chile	21.7	7.2	6.8	7.9	Chile***	28.3
Mexico	11.4	3.3	3.3	3.4	Mexico***	52.2
Argentina	19.2	9.5	8.5	10.8	Argentina***	48.1
Brazil	24.3	12.5	11.1	14.4	Brazil***	37.5
Spain	24.8	15.5	13.6	17.6	Latin America & Caribbean**	49.0
Italy	22.8	10.2	11.1	14.4		
France	19.5	9.2	9.1	9.2	European Union **	13.2
UK	11.5	4.0	4.0	3.9		
Finland	18.2	7.8	7.9	7.6		

Under-employed: working part-time or, working full-time, would like to increase their working hours

Sources: Unemployment rate, ILOSTAT (2018). Informal employment: ** Philippe Mercadent. The transition of the informal economy through an integrated approach, V Seminar on informal economy (data relative to 2016), Sept. 2017, ILO; *** ILOSTAT: (non-agricultural population) Chile 2017, Mexico 2017, Argentina 2018, Brazil 2013, Uruguay 2013

^aRecent studies measure informal or submerged employment, in terms of GDP, not of employment. See the publications of Leandro Medina and Friedrich Schneider (2017), Shadow economies all over the world: new estimates for 162 countries from 1999–2007 Leandro Medina and Friedrich Schneider (2017). Shadow Economies Around the World: What Did We Learn Over the Last 20 Years? (special reference to European countries), IMF Working Papers, n° 18, 2017

Table 5.2 Robots per 10,000 employees in the manufacturing industry (2016)

Italy	185	Mexico	31
Spain	160	Argentina	18
Finland	138	Brazil	10
France	132	Germany	309
UK	71	South Korea	631

Source: International Federation of Robotics (2017)

productive structure as well as their subordinate position in the globalisation process, which increases the risk of routinisation. However, poor employment and unemployment are sources of low salary costs, and therefore entail a lower risk of effective robotisation.

Beyond the experts' predictions about the risk of job loss, we have a relative indicator of the possible risk, namely the number of robots (Table 5.2) in the different countries, and therefore of effective robotisation entailing the loss of real jobs.

The manufacturing industry, and in particular the automobile industry, represents only a small number of the jobs in most countries, which explains why the figures for Germany and South Korea (630 robots/10,000 workers) are so high in that sub-sector. The low number of robots in the UK is particularly striking, probably due to its decline in vehicle manufacturing. In Latin American countries, robotisation is

probably less profitable for the time being due to the low wage costs. We should also note that in countries like the UK and Finland, digitalisation is transforming jobs, especially in services, where robotisation is making fewer inroads. Another aspect to consider is digital platforms, which destroy stable employment inside and create unstable employment outside (in the same city, the same country or in another), so-called ‘independent workers’. There is very little data on the topic. According to Cañigueral (2019), the number of professionals working independently in such companies has grown in Europe by 45% since 2005. In Spain, the growth is even greater, 51%.

Digitisation can improve certain jobs and make others worse. Among the latter we have ‘riders’, but this can also be the case of many other ‘independent workers’ who work for low pay due to the strong competition, which in some professions can be global, and perform a variety of different tasks, particularly in services and working remotely. However, employment in the ICT sector tends to be a solid indicator of job improvement in countries where the digital economy is making advances. According to recent OECD data, employment in the ICT sector in 2015 was 3% for all OECD countries, 1.8 in Spain and 0.5 in Mexico. Argentina and Chile are below that figure, the UK is above it (OCDE 2015). The qualification requirements for such work will increase in the coming years (CEDEFOP 2015), although they will not always lead to quality jobs (salary, contract, hours) as was verified by a recent study in Spain (Alós 2019).

Many of the publications on employment in the digital revolution highlight the impending loss of current jobs, but they under-emphasise the creation of new jobs and the transformation of others. In any case, it is not enough to only refer to the possible future. We must also take into account what is already happening, because we are already in the digital revolution that destroys, creates and transforms jobs. We shall examine the evolution of employment in the last 15–20 years in three countries: the United Kingdom, the United States and Spain. Between 2000 and 2015, the United Kingdom (Deloitte 2015) gained more than two million jobs, with a decrease in low-skilled and a large increase in skilled ones, particularly in services. The United States (McKinsey 2019) is at all-time record employment levels. Jobs are particularly more numerous in education, health, trade, personal services and entertainment. Spain (*Encuesta de Población Activa*) created three million jobs between 2000 and 2007, lost four million with the crisis and since 2014 has regained three million. But these jobs are mainly being created in traditional sectors such as low-skilled services and construction, with little technological potential. It is in terms of productive structure that the three countries differ, and this is where modernisation needs to happen.

Poor jobs and unemployment will continue to be the real threats, even if robotisation is halted. The former may not disappear with digitalisation,¹ because competitiveness has become more and more global. Regarding the latter, there is a risk that

¹ Spain is the EU country with the most workers on digital platforms (Pablo G. Bejerano, *El País* 29 August 2019), mostly in highly unstable working conditions.

it will be high in periods of transition, but it could then drop due to the creation of so many jobs linked to education, health and social services, environmental care, leisure and culture. So, today, in developed countries, low wages would seem to be a greater threat than unemployment in the near future. We should also note that the requirements for qualified employment are not exclusively linked to ICT (Information and Communication Technologies) companies and high level digital skills. It could also be required in services like education, health, social services and other services that will clearly need a basic level of digital skills, but that will be substantially based on other ones (Alós 2019).

5.3.2 Everyday Life and Technologies (Internet, Mobile Phones, Digital Networks)

An analysis of the advance of information and communication technologies (hereinafter ICT) in the public arena means examining the effect on the modes of production that they have enabled, their consumption by people and households, and how they have affected their daily lives. This section will address the major social changes brought about by the digital and technological transformations that have occurred in the world by examining the penetration of internet, mobile telephones and social networks to verify the use or consumption of technologies by individuals and households, confirming the rapid, dynamic and large-scale dispersion of these in the countries analysed.

In the early 2000s, the development of digital technologies led to the technological convergence of the internet, smartphones and the emerging social networks (Rainie and Wellman 2012). To avoid semantic confusion, this chapter refers to the latter as ‘digital networks’ rather than ‘social networks’ as they are commonly known. The aforesaid technologies have produced countless changes to the lives of the people who carry them and to the homes that use them, as is so evident today.

The convergence of these technologies has meant that a sizeable proportion of interpersonal communication is now conducted via digital media due to the decreased restrictions in terms of time and space and an increase in interactivity (Wolton 2000). This means people can be in permanent communication due to the reduction of barriers to interpersonal communication in terms of both time and space, and this communication is both instantaneous and asynchronous.

The result was not only technological but also socio-technological, due to the mass adoption of technologies in relatively short periods that were designed for people to be able to access in everyday contexts. The internet has provided people with a greater capacity to communicate and access information because it has increased their ability to connect with other people and groups. Smartphones have given them the possibility of permanent communication, whereby they can access the information they need and make contact with people and groups of interest.

Table 5.3 Percentage of individuals using the internet in the following countries, 2000–2015

Countries	2000	2005	2010	2015
Argentina	7.04	17.72	45.00	68.04
Brazil	2.87	21.02	40.65	58.33
Chile	16.60	31.18	45.00	76.63
Mexico	5.08	17.21	31.05	57.43
Uruguay	10.54	20.09	46.40	64.60
France	14.31	42.87	77.28	78.01
Finland	37.25	74.48	86.89	86.42
Spain	13.62	47.88	65.80	78.69
Italy	23.11	35.00	53.68	58.14
United Kingdom	26.82	70.00	85.00	92.00

Source: <https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx>

Table 5.4 Mobile phone subscriptions per 100 inhabitants, 2000–2015

Countries	2000	2005	2010	2015
Argentina	17.51	56.60	138.47	142.43
Brazil	13.23	46.12	100.07	125.18
Chile	22.29	65.46	116.82	130.65
Mexico	13.84	43.45	77.89	85.54
Uruguay	12.37	34.73	131.49	150.53
France	48.74	78.53	91.68	103.45
Finland	71.87	100.21	156.36	134.92
Spain	59.32	96.94	109.83	110.07
Italy	73.74	121.58	156.82	147.37
United Kingdom	73.71	108.60	121.20	121.18

Source: <https://www.itu.int/en/IU-D/Statistics/Pages/stat/default.aspx>

Via the digital network, which is basically a web-based service in which people can create a public or semi-public profile within a delimited system, they can also create lists of other users with whom they wish to share a connection, browse that list of connections, and see what other users are doing within the system (Boyd and Ellison 2007). *Facebook, Instagram, Twitter, WhatsApp, Flickr, Tumblr* and many other digital networks have provided people with a simple way to manage social ties and to move among larger and less compact groups, with access to a greater diversity of social relationships (Rainie and Wellman 2012). The data in Tables 5.3 and 5.4 shows how people adopted all three technologies in particular countries.

The internet spread rapidly in a relatively short time in all countries. Although it did not cover the entire population, the proportion of the population that had the service grew a little more than twofold in Finland and Italy, and grew fivefold in Brazil.

Mobile telephones underwent significant growth in the period. For all countries analysed, except Mexico, the entire population had coverage by 2010, and the

uptake continued to rise through to 2015. The significant penetration of mobile phones² fully expresses the relentless expansion of digital technology, while leap-frogging meant that not only was the technology attracting new users, but many who had never had landlines directly became mobile telephone users.

The evolution of digital networks in the analysed countries, as shown in Fig. 5.1, describes the presence of *Facebook* in the 2008–2019 period and *Twitter* between 2009 and 2019. The methodology used to capture data for the period is *Google Trends*, and we show the number of mentions of *Facebook* and *Twitter* in the search engine. The data in the tables is normalised to 100%, so the maximum value is one hundred, and the remaining values are adjusted proportionally.

The data on digital networks shows how *Facebook* emerged from 2008 and *Twitter* from 2009. The *Facebook* digital network was adopted in a similar way in all analysed countries. The cycle began with constant growth users until reaching a maximum proportion that at times exceeded 90% in some countries. In Chile, it is noted that the penetration began in March 2008, once the network had been made public and open all around the world that year. The characteristics of the development strategy allowed the import of technological goods with low tariffs, so a large number of digital items for personal use were made available for consumption by the population. Acquiring them meant having access to *modern goods, which are consumed in advanced countries* (Mayol and Ahumada 2014).³ In Brazil, *Facebook* was incorporated in 2010, for that country had a very similar digital network of its own called *Orkut*⁴ that was widely used, being replaced by *Facebook* in 2010 and 2011.

Twitter appeared in 2006. Its trajectory was similar to that of *Facebook*, but in much smaller proportions. In just a few years, it expanded rapidly to reach a maximum number of users, around 5% in Latin American countries, and between 10% and 12% in the set of European countries analysed.

In summary, the data shows that the process of adoption of the analysed digital technologies was relentless rather than gradual, involving a constant convergence of technologies, with specific differences between countries in the period. Digital networks appeared in waves and users were able to access a number of them and use them in complementary manners. In 1997, they arrived in people's everyday lives around the world when *Six Degrees* appeared on the internet. The following decade brought *Fotolog* in 2002; *Linkedin* and *MySpace* in 2003, *Flickr* in 2004, *YouTube* in 2005, and *Twitter* in 2006 (Boyd and Ellison 2007), all available on users' mobile phones. So, by 2010 the convergence of the aforesaid technologies had been consolidated, and they were part of people's everyday lives. Later in this chapter, we shall look in depth at the social consequences of these changes.

²Regarding mobile telephones, the 2018 Latinobarómetro report (p. 76) noted that “the possession of cell phones and Smartphones has broken the digital divide by delivering access to social networks”.

³In Mayol and Ahumada (2014).

⁴This network existed between January 2004 and 30 September 2014.

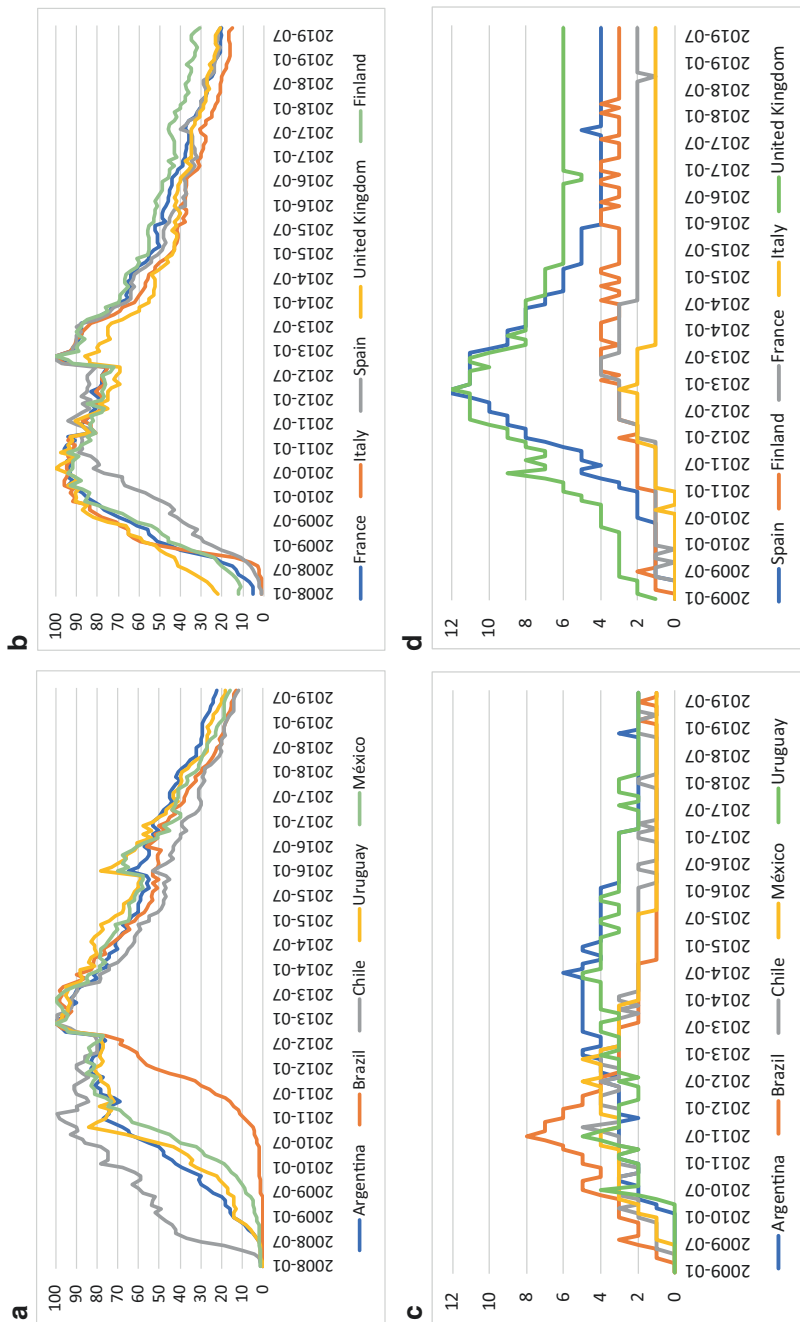


Fig. 5.1 Evolution of Facebook and Twitter 2008–2019. (a) Summary of the percentage of Facebook users in Latin American countries. (b) Summary of the percentage of the Facebook users in European countries. (c) Summary of the percentage of the Twitter users in Latin American countries. (d) Summary of the percentage of the Twitter users in European countries. Source: Own elaboration based in Google Trends (Choi and Varian 2011)

5.4 Society's Possible Response to the Fourth Technological Revolution

5.4.1 *What Policies and Regulations Are Desirable in Relation to Employment?*

The answer to the challenges of the digital revolution must come from companies and society as a whole; the former by creating adequate and quality jobs, the latter through political interventions and changes in lifestyles both in relation to the productive system and with respect to people's education, as well as reforms and regulations that continue to guarantee rights and achieve the inclusion of those at risk of exclusion. Two types of intervention are needed: those that can be carried out by administrations and those that come from the relationships between actors in the labour market (social dialogue, negotiation). Several kinds of action are required of administration: support for the modernisation of the productive structure by investing more in R&D&I, support for the digitalisation of small and medium enterprises, increasing energy transformation, promoting economic sectors with a future, and so on, all of which would help to create more skilled jobs. Public policies can also improve the quantity and quality of essential public services, whereby jobs would also be of better quality. It is also essential to invest in education and training and bring it more in line with the digital era.

Investment in R&D&I (Table 5.5) is essential in order to modernise the productive structure, adapting it to the new parameters of the digital revolution. The European Union stated in 2010 that it is crucial for investment in this area to reach 3% of GDP by 2020, when summing public and private investment. 2017 data shows (European Commission 2018) that the average such investment in the European Union is only slightly over 2%, with only Germany, Denmark and Sweden having reached 3%. Spain is still far behind, and has fallen back during the crisis period, and that is not a good sign. The Commission feels that one instrument to achieve this goal is the doubling of public investment, something that Spain has not done either. The compared Latin American countries, with the exception of Brazil, are far from that recommended percentage, and this will undoubtedly hinder the transformation of their productive and employment structures even more than in Spain (Table 5.5). Public policies are another key

Table 5.5 Investment in R&D&I/GDP in the countries studied (2017)

Uruguay	0.41	Spain	1.21
Chile	0.36	Italy	1.35
Mexico	0.49	France	2.25
Argentina	0.53	UK	1.79
Brazil	1.27	Finland	2.76

Sources: Europe EUROSTAT 2019, World Bank 2017 Eurostat updated March 2019: EU. World Bank: Mexico (2017), Argentina (2016), Chile (2016), Brazil (2016), Uruguay (2016)

factor in these countries. The State can play a clear role in this drive towards a new economy (Mazzucato 2015), with stronger action, especially with regard to small and medium enterprises (Miguélez et al. 2019).

Another aspect of capital importance, in terms of productive structure, is the change of energy model, which is shifting quickly from fossil and nuclear energy to renewable energy. This is essential in the face of an even greater challenge than that of technology, the climate crisis, and this is an issue that digital technology itself could actually help to prevent. There are notable differences between countries in terms of the use of renewable energies, as can be deduced from the data for 2015 in the following Table 5.6 (World Bank 2016). More Latin American countries than Europeans, except Finland, are close to reaching a level at which alternative energy is more widespread than fossil and nuclear forms. This could be an advantage for the former and should be an incentive for the latter.

The proportion of employed managers, professionals and technicians in a country may be an approximate indicator of job quality in the upper primary segment, derived from both a technologically consistent productive structure that is open to digitalisation and quality public services (Table 5.7). Once again, the data suggests differences in quality between the countries of the European Union, led by the

Table 5.6 Renewable energy consumption/total, 2015

France	13.50	Argentina	10.04
Italy	16.52	Brazil	43.80
Spain	16.25	Mexico	9.22
United Kingdom	8.71	Uruguay	58.02
Finland	43.24	Chile	24.88

Source: World Bank (2016)

Table 5.7 High educational levels and quality of employment

Employed with advanced educational level 2018	Percentage	Employed with advanced educational level 2018	Percentage
Uruguay	12.5	Spain	42.9
Chile	18.7	Italy	21.7
Mexico	23.42	France	40.7
Argentina	22.56	UK	43.7
Brazil	21.90	Finland	44.0
Employed: Managers, Professionals, Technicians 2018	Percentage	Employed: Managers, Professionals, Technicians 2018	Percentage
Uruguay	22.4	Spain	33.9
Chile	26.2	Italy	36.8
Mexico	19.8	France	45.9
Argentina (2017)	24.7	UK	49.0
Brazil	23.8	Finland	47.9

Source: ILOSTAT (2018)

United Kingdom, and Latin America, where Chile is slightly above the rest. Spain and Italy are in intermediate position between the two continents. There is also a highly notable difference between the countries of both continents as a whole for the higher education indicator, with Uruguay in a particularly weak position. Italy is on a similar level to Latin America. There is a notable deficit in education in these countries in the face of the challenges of the digital revolution. However, the high educational level of Spain, where universities have boomed in the last two decades, has not led to a higher percentage of quality jobs than the European Union average, due to a more traditional productive structure and an abundance of low-skilled and poorly paid jobs in public services (Alós 2019; Banyuls and Recio 2012). This is another indication that technological innovation and high education levels depend on the socio-economic context and government policies.

It is worth asking whether administrations are obliged to implement new regulations to deal with the appearance of many jobs that lack guarantees in terms of hours, contracts, pay and bargaining, an area where social dialogue and bargaining can complement the ways in which problems are tackled and resolved. Although there has been little empirical research in this regard, there was a recent study in Spain (Miguélez et al. 2019), in which experts and social actors almost unanimously defend the need to regulate these new types of job, often held by 'independent workers' (digital nomadism, whereby people can use computers to work from anywhere in the world; on-call, with no set number of hours or wages; collective work, crowdworking). Two different kinds of proposal are suggested, namely social dialogue and modification by Parliament of the Workers' Statute. Not only trade unionists, but also most experts and most significantly business owners, are in favour of new 'independent workers' continuing to have the right to negotiate their working conditions.

The new economy will pose other challenges, in which policies must play a role, such as the possibility of reducing the working day that, apart from social and personal benefits, could have a positive influence on the economy by increasing the time that people have for engaging in other activities, such as culture, leisure, learning new skills, and so on, which would boost employment. It is also likely that the pace of technological change will increase structural unemployment. Dealing with this may require, as many experts believe and as many experiences are showing, the guarantee of a minimum income to certain groups, and this income could be unconditional or conditional to training or activities useful to the community. The latter was especially predominant in the answers to the questionnaire used in the aforesaid study (Miguélez et al. 2019).

All these policies will ultimately need funding, which will mean reviewing tax systems. Should robots pay taxes on the profits generated by digitalisation, and on the profits generated by multinational companies in any country in which they are present and not only where they are registered for tax purposes, which may be a semi-tax haven? Traditional tax systems are mostly based on the income of people employed in the country and the profits of companies based in the same. The digital economy could change this framework, and political debate can be expected to shift in the direction of certain changes that have already been made by the European

Parliament, albeit without, for now, the Commission's proposed taxation on robots having achieved its objective. There is also on-going debate on the issue of green taxes, which are essential in order to halt the climate crisis.

5.4.2 A New Concept of School and Education Is Required

The asynchrony of people living longer and the rapid technological and social changes described in the introduction to this text already requires today, and will do even more in the future, a new kind of school and education system. In order to deal with the changes in the relationship between education and work that this asynchrony entails, we need to create a new concept of schooling and training, along with changes to the functions and organisation of the institutions that support it. There are two main changes: (a) the concept of education as a lifelong process and (b) a focus on "initial schooling" to lay the foundations and provide the instruments in an irreversible manner to ensure that lifelong education is viable for all.

One of the first phenomena that require attention is that in order to keep up with the many changes to work and life that people are going to encounter throughout their lives, education must be viewed as a life-long process. This will be a complex process and the result of non-linear educational experiences, with people entering and leaving School, or learning while working, and doing so flexibly throughout their whole lives. Within this complex process, digital technologies will play a greater role as ways to learn and will penetrate the other forms of education based on virtual learning, such as MOOC (Massive Online Open Courses). Both the face-to-face and strictly virtual forms of schooling will be fully affected by technological change and will generate 'micro-learning' supported by internet access and the educational use of that access.

Both the speed of the change in what we must learn and of the way we will learn it will imply that, in terms of management, both school and other forms of education will need to forego the pretension of 'anticipating' what the labour market is going to require in the medium and long term, as we have been trying to do so very ineffectively for decades (Planas 2014). Given the uncertainty of the precise requirements of the labour market, we must flexibly manage school and training systems by combining a solid initial education with refresher mechanisms to meet whatever labour demands might arise in the future, throughout people's active lives. We are faced by the phenomenon of 'myopia', the farther ahead we look to understand the requirements of the labour market, the hazier our view becomes. And to continue with the analogy, because of the speed of technological change we will need increasingly more powerful diopters and we simply do not seem to have strong enough lenses for the purpose. This phenomenon of 'myopia' means we can only anticipate the needs of the labour market in the short term or, at most, in some fields, in the medium term.

As Hampt and Woessmann (2017) note, based on the results of the PIAAC survey, education focused on specialisation to meet the demands of a given time is

“bread for today, but hunger for tomorrow.” In the abstract to their paper they write: “It has been argued that vocational education facilitates the school-to-work transition but reduces later adaptability to changing environments. Using the recent international PIAAC data, we confirm such a trade-off over the life-cycle in a difference-in-differences model that compares employment rates across education type and age. An initial employment advantage of individuals with vocational compared to general education turns into a disadvantage later in life. Results are strongest in apprenticeship countries that provide the highest intensity of industry-based vocational education”.

Given this phenomenon, we must distinguish between two types of learning: basic, which is preferably acquired in the early stage of people’s lives (childhood and youth) and in which, at least until today, general schooling has played a decisive role, and continuous training, which is based on that basic education. The main goal of the former is the long-term objective of learning the basics, the skills and the knowledge that will serve us to learn the new skills and knowledge that the technological and social change will require of us in the short term, throughout our adult lives. These changes will also require the school system to allow people to come in and out of school during their active lives, with their school learning overlapping or coinciding with other jobs, or while exercising domestic and care duties. This will imply that schools, especially at their higher levels, will need to make their institutional structures more flexible to allow for this (Conseil National du Numérique 2016).

Today, neither schools nor companies, nor the ways in which reproductive tasks are organised, are flexible enough for such an approach to be viable for people. School and training itineraries are too complex. Very few countries have addressed this issue in their legislation, even fewer schools allow for it and although numbers are growing, few companies encourage it.

Regarding the kinds, contents and functions of education, the current panorama is characterised by the need to understand that education is, already today, but even more so tomorrow, the result of the co-production of a multitude of educational spaces in a wide variety of moments in people’s lives: school (of various types, including virtual schools), work (paid and unpaid), the many spaces of non-formal education, internet ... And in combinations that cannot, a priori, be predicted or standardised.

With the experience of recent decades one thing seems clear, the capacity to access lifelong education depends largely on the education (of all kinds) received during the compulsory education period. Lifelong learning was sometimes viewed as a way to make up for deficits in initial education and to compensate for the inequalities in early schooling, but the reality today very clearly shows that the phenomenon actually works the other way round. The people who most access lifelong education are those who had more and better initial education. So rather than compensating for differences in initial education, lifelong learning increases them, as the people who more easily and more frequently access it are those that received more and better initial education.

It also seems reasonable to imagine that, as occurred with the surplus of previous technological revolutions that was used, among other things, to develop and

implement compulsory schooling for everyone, a large part of the economic surplus that is generated and will be generated by technological change should be used to sustain early education and lifelong learning policies. That is provided there is the political will to do so, as there was when implementing education for all in the last century.

Getting early schooling and education to really be a sufficient starting point to guarantee lifelong learning is a priority challenge today if we are to prevent deficits in the former from leading to social exclusion.

Responsibility for this new type of lifelong schooling will require the intervention of many actors, at least, the State, in its multiple forms and levels, companies, families and individuals. There are three basic questions that must be answered in order to organise the different kinds of lifelong learning: Who decides the purpose of education other than that in the initial stage? Who pays? Who puts in the time? Policies and the available public resources will have to help find the answers to these questions.

As for who decides the purpose of additional learning, there are clearly three key decision makers: (a) companies according to their needs, (b) people who need to refresh their knowledge, or refocus their careers by changing companies or even sectors and (c) the state to support its policies of all kinds.

The experience of recent decades tells us that whoever decides on the training that workers need (the actual worker, his/her company or the State) will influence (albeit not decisively) the answer to the other two questions: Who pays? Who puts in the time?

As a general trend, we might suppose that whoever decides would have greater responsibility for assuming the costs, both of the education and of the time. But in practice whoever assumes the costs both in money and in time is decided politically through public policies that offer support when it is companies or individuals who decide (noting here the role of the European Social Fund in Europe). In a fair number of European countries there is an individual right to lifelong education, part of the costs of which are borne by the people. But the individual right to lifelong education also receives support from businesses in many countries through the agreements reached via 'collective bargaining' at the sector or company level. Examples in this field are manifold and sometimes very old (such as '150 Hours' in Italy in the 1970s, half a century ago).

The previous paragraphs imply that the central function of initial education, in a period of uncertainty, is to provide the instruments to access lifelong learning. It should be, as it has been, the basis for access to further educational activities. Focusing this basic function on initial education will imply making changes to the contents, methods and forms of this education.

We shall now make a comparison between the countries included in this study. As available indicators for comparability we propose the following.

Level of Education of the Adult Population (25–64 Years) Broken Down by Sex

Although initial school education still needs to be improved, the function of basic education has been and still is largely assumed, *de facto*, by the school system.

Table 5.8 Educational attainment population from 25 to 65 years old. 2010

	ES	FI	FR	IT	GB	AR	BR	CL	MX	UY
Total population										
Primary	30.1	28.7	19.2	19.9	15.9	41.9	37.0	22.0	34.4	48.9
Secondary	41.7	39.3	54.8	61.7	55.6	45.2	39.3	57.0	38.7	40.1
Tertiary	25.7	31.6	24.4	12.1	28.3	12.5	11.3	18.1	17.7	9.4
Female population										
Primary	32.5	28.8	22.0	22.5	17.1	42.3	35.8	23.3	35.3	47.6
Secondary	39.0	36.3	51.8	56.7	54.6	43.4	39.5	55.6	37.6	39.5
Tertiary	25.2	34.4	24.7	12.5	28.1	13.0	12.5	17.9	16.5	11.2
Male population										
Primary	27.6	28.6	16.2	17.5	17.1	41.6	38.1	18.7	32.8	50.1
Secondary	44.6	42.6	58.0	66.8	55.3	47.2	39.4	60.0	40.4	41.1
Tertiary	26.2	28.7	24.3	11.7	27.5	10.4	10.0	18.8	19.1	7.5

Source: Barro and Lee (2013)

We observe that a population's level of schooling is a good indicator of: (a) the danger of robotisation of jobs, which is inversely proportional to the level of education of the workers who do them (Arntz et al. 2016); (b) people's ability to learn new things through access to continuing education in any of its forms; (c) a higher educational quality of the jobs they do and (d) a greater capacity to incorporate technological change into their work (Lladós 2018). For these reasons, a country's level of initial schooling is, albeit a simplification, one of the comparable indicators of its ability to assume the changes in the school-education system that new technologies will require.

With respect to the countries in the INCASI project, the comparable information on their level of schooling for 2010 is the following Table 5.8.

We can take this data as an indicator of the capacity or not of countries to adapt to technological change (the greater the schooling, the greater the capacity to adapt) and it reveals that overall, European countries are better placed than Latin American ones to deal with the technological changes we are experiencing and that are on the way. But among Europeans, the data suggests that Italy has lower figures for higher education and that out of the population as a whole, men are better positioned than women.

Percentage of Young People Who Do Not Reach the Level of Compulsory Education

Following the analysis by Arntz et al. (2016) a particularly relevant figure for comparison is the percentage of the population that does not reach secondary education, which is currently the minimum considered compulsory in all countries. Those who do not reach this level are those who are at the most extreme risk of doing automatable work and who will have the greatest difficulties readjusting to fill the new jobs that will appear, and hence face a significant risk of technological changes leading them to social exclusion.

Percentage of the Active Population that Performs Continuing Education Activities in One Year by Age and by Previous Level of Schooling⁵

Taking into account the statement made in the OECD report “*Adult learning can play an important role in helping adults to develop and maintain key information-processing skills, and acquire other knowledge and skills, throughout their lives. It is crucial to provide, and ensure access to organised learning opportunities for adults beyond initial formal education, especially for workers who need to adapt to changes throughout their careers*”, another indicator of a country’s capacity to adapt to the impending technological and social changes is their population’s ability to access continuing education. The first thing we notice here is the lack of information on access to continuing education in most Latin American countries. The 2013 PIAAC survey only included Chile and the 2017 survey only featured Mexico, but the results of the latter are not yet available.

The overall data of the 2013 PIAAC survey indicates that 17% of the population of the OECD countries that participated in the survey aged between 25 and 64 received either formal or non-formal education in the 12 months prior to the survey, although a larger proportion, 24%, would have liked to have done so. The educational activities that they had done in this period, despite being from the same source, were both formal and non-formal. Most of these were non-formal but 11% were formal, both combined with non-formal education and not. This data shows that adult education is gaining ground in huge proportions, albeit very differently between countries. From 70% in Finland, the figure drops to 25% in Italy, with 50% of people aged 25–65 years in countries like Spain and Chile having done educational activities. Respondents give two reasons for not having received more continuing education: (a) time (working hours and time dedicated to the family) and (b) cost of continuing education activities. Both factors are subject to public policies and funding that could facilitate access to continuing education, as is currently the case with the European Social Fund, although it is manifestly improvable.

As stated previously, we do not have data for most Latin American countries so we are unable to assess the possible differences between the INCASI project countries.

Educational Premium of Higher Levels

The ‘educational premium’, i.e. the increase in income depending on whether one reached higher education or not, is reflected in Table 5.9 in which there is no data for Argentina or Uruguay because they are not included in the OECD 2017 report.

This data, in addition to showing the already noted polarisation of income in Latin America, indicates that one of the factors of that polarisation is level of schooling, and more acutely than we observed in Europe. When combining the polarisation of income with that of school, we can foresee that the effects of the digital revolution on social exclusion are likely to be much greater in Latin American countries.

⁵ We do not have ‘finer’ comparable information on continuing education, such as the number of hours or the type of training.

Table 5.9 Relative earnings of workers, by educational attainment (2015) (25–64 years-old with income from employment; upper secondary education = 100)

	ES	FI	FR	IT	GB	AR	BR	CL	MX	UY
Below upper secondary	71	99	80	77	76	nd	62	68	61	nd
Post-second non-terciary	114	115	nd	nd	Nd	nd	nd	nd	nd	nd
Short-cycle tertiary	nd	120	131	nd	124	nd	nd	142	130	nd
Bachelor's or equiv.	nd	122	138	nd	151	nd	235	264	196	nd
Master's, doctoral or equiv.	nd	164	205	141	181	nd	449	472	371	nd
Total terciary	153	137	154	141	153	nd	249	237	202	nd

OECD Education at a glance 2017. *nd* no data

This data leads us to consider that the promotion of both initial and continuing education and both formal, non-formal and informal education should be a priority objective for countries in both continents, but most intensely in Latin America in order to exploit the benefits of technological change and avoid its negative effects.

5.4.3 *Elements for Understanding the Sociocultural Change that Will Come with the Technological Revolution*

It was previously found that the convergence of internet, mobile phones and digital networks was consolidated at the beginning of the decade in all the countries analysed. Would this technological convergence lead to sociocultural change? And if so, how? And what is its scope? Indeed, the convergence of technologies did lead to sociocultural change, as the analysed data reported. People adopted these technologies en masse and in doing so interpersonal ties have become digitally mediated. Technology users generated, it could be said, a ‘digital copy’ of their social relationships on digital networks, which has led to alterations to the informal structure of society, corresponding to the web of social networks formed between the individuals that make up a society.

The alteration of the informal structure of society includes: (a) a *small world* structure⁶ (Milgram 1967; Watts 2006), i.e. a network with a high degree of grouping and the need for few random links to cover any network, no matter how large; (b) a reduction in the barriers of time and space, which means information is transmitted much more rapidly; and (c) increased interactivity (Wolton 2000). This entailed a large number of social phenomena being enhanced and/or acquiring new force due to the alteration of that structure of society, including the reconstitution of

⁶This is an important aspect because not all networks are the same. It would be wrong to claim that all personal nodes are interrelated in the web, and that they therefore all communicate with each other. The differences in structures are associated with the phenomena that generate them. For example, networks with preferential links to financial phenomena. There are also regular or ordered network structures, disordered or random networks, small world networks, and others.

social ties in the family, school and other settings due to these technologies (Winocur 2010). Because people were able to recompose their social networks, either by re-forging social ties that had been lost over their lives, and/or by adding new ties associated with their personal interests, this process involved the creation of new social ties, or simply expanding those that people already had (Diani 2011). When digital networks made it possible to maintain a greater amount of ties, and communicate with them faster, it also became feasible to establish and maintain new social ties in the digital space.

The union of the technological and the social occurred through the digital mediation of interpersonal ties, referring to how all or part of the relationship between two individuals is made digitally via those technologies, offering users new capabilities but also producing new risks, for digital networks have been questioned due to the spread of intentionally false news. Likewise, digital network providers are criticised for the difficulty keeping data private and the filtering of information. They increasingly violate so-called net neutrality, according to which all content must circulate freely on the internet, at the same speed and under the same conditions (Martel 2015: 401). Similarly, people today receive a greater amount of information than in previous times, and so network providers have turned to algorithms, i.e. organising information by filtering it, such that the relative importance of information can be guided. To this we can add network monitoring by national governments for purposes of control and repression.

At this point in the decade, this alteration means that the physical-virtual dichotomy no longer holds (Wellman 2001; Rheingold 2004; Pleyers 2018). As the physical network, or social network, is digitally 'copied' in the virtual network, people can use direct interaction with the physical world and/or the interactive capacity of the digital world as it suits them. So today, homes and workplaces are more intertwined than in previous times, and the link between the private and public spheres in which people live is also much tighter (further background in Rainie and Wellman 2012). The local (i.e. national) sphere has been strengthened, despite what is being said about the consolidation of predominantly homogenised and global social relations, typical of the first wave of digital networks in the last decade. This is because even though the possibility of creating global links in the digital space has arisen, communication is mainly made with local contacts. People's basis of collective action is still the communities (netdom) in which their personal lives unfold (White 2009). Thus, "Digital issues are territorialised phenomena, the Internet does not abolish traditional geographic limits, does not dissolve cultural identities, nor does it smooth out linguistic differences: it consecrates them" (Martel 2015: 21).

As Voss and Williams (2009) noted, the decrease in state intervention in countries' economies that reduced the protection of the population's interests paradoxically happened at the time as an increase in civil society's potential for organisation, which was reflected by the increase in social movements around the world.

In consideration that technologies link their users with a broader context, in which their users draw on a personal and social history that constitutes the basis for their use of technology (Proulx 2001: 1), it is observed that in different national

contexts, with very different idiosyncrasies and governments, collective actions, movements and social mobilisations of similar characteristics emerged, involving mass protests and demonstrations, and messages that spread rapidly.

2011 witnessed numerous collective protest actions in different countries, examples being Egypt, Tunisia, the United States (Occupy Wall Street), the *15M Indignados* in Spain, and the protests by Chilean university students. Authors have particularly highlighted the mass gatherings of protesters, the vast repertoire, horizontality, the spread of messages across digital networks (*Twitter*, *Facebook* and *blogs*) and smartphones used by protesters, whereby they have been dubbed the *2.0 Revolution* or the *Facebook Revolution* (Fuchs 2012). Castells (2015) claims that the horizontality of these networks favoured cooperation and eroded the need for formal leadership. Fuchs (2012) questions the idea of a social movement without a leader, and argues that the movements that year used ICT to direct protesters' actions through suggestions and instructions. Popovic (2016), writing on the events in Tahrir Square in 2011, stresses the importance of the work that Egyptian revolutionaries had been doing for years. Numerous authors include the use of ICT by protesters and their groups in their explanations. They have even suggested that they played a key role in strengthening democracy. But this is a controversial relationship, as was made clear by the discussion between Clay Shirky and Malcom Gladwell on the demonstrations in Iran in 2011 (Shirky 2011). Shirky claimed that ICT dramatically improved the ability to share, cooperate and act together, which leads to a change of era. Gladwell argued that the use of ICTs involves a high risk because they are built on weak ties, while it is strong ties that support digital activism. This debate proposed the main perspectives on the matter, and they are still valid today.

In the following years, in different national contexts and with different social demands, new actors were mobilised. The *Yo soy 123* student movement broke out in Mexico in 2012, in Brazil in 2013. More recently in Argentina in 2015, the *Ni una menos* movement in opposition to violence against women broke out, followed in 2018 by the social movement around the proposed voluntary interruption of pregnancy bill. In the same year, France had its 'yellow vests movement' (*mouvement des gilets jaunes*). And in 2019 there were other social movements⁷ in Ecuador over oil and in Peru over corruption, while Spain had the Catalan independence 'process'. As we write this chapter, there are mass protests in Chile⁸ against the increased cost of public transport in the capital city. This example includes all the illustrative characteristics of digital mediation in interpersonal ties, whereby it is mainly self-convened, involves massive social participation; and demonstrations in many different places at the same time. It is decentralised, yet it is presented to the public in a coordinated manner, even though it may sometimes appear to be out of control. And

⁷https://elpais.com/internacional/2019/10/26/america/1572112346_368643.html

⁸<https://www.elmostrador.cl/noticias/2019/10/26/sin-escenarios-ni-locutor-ni-discursos-el-pueblo-le-dio-un-mandato-a-la-politica/>

all this is happening in the face of perplexity among public authorities, and is putting traditional social intermediaries in a very difficult situation.

In sum, the implications of the ongoing changes mean that technological convergence has led to major socio-technological change as people adopt the internet, smartphones and digital networks en masse. In doing so, they digitally mediate interpersonal ties, thereby altering the informal structure of a society that acts as a support for various social phenomena by introducing new elements and new dynamics that require something other than traditional social intermediaries (political parties, unions, neighbourhood organisations, student bodies, etc.) who have usually only viewed these technologies as a means of communication. But they actually constitute the most efficient, most robust and fastest means to disseminate information, ideas and influence by digital word of mouth, and grant the possibility to generate ‘bottom-up’ collective actions due to the preponderance of the local within the web through which messages are transmitted and retransmitted, i.e. information is transferred from one individual to another inside the network. How does this happen? In order for a message to be retransmitted, it must mean something to the person who transmits it, and also to their ‘friends’ in the network who receive it. If this happens to ‘friends’ and to ‘friends of friends’ then the message will soon be passed all around the network due to the structural characteristics of the ‘small world’.

5.5 Conclusions

In the society that has been emerging over the last 10–15 years, the digital economy has become increasingly more hegemonic in terms of business activities and organisation, jobs and, little by little, people’s everyday lives. It will not advance at the same rate in all countries and the whole of society will not be covered. That is why comparisons between countries make sense, as we have done in this chapter, as well as examining differences between men and women, educational differences and others. But digital technologies are developed in a specific social context, so interests, strategies, associations, and cultural, social and political traditions will play a role in their evolution. We have sought to summarise all these possible conditions for the advance of new technologies and their consequences for the people in terms of what we have called policies (regulations, public resources, government actions, strategies of social actors, as well as the role of both formal and informal education). But we have also examined some of the real everyday practices of the people.

The Advancement of Technological Innovation and Its Consequences

We first looked at companies and employment. The data indicates that internet connection has grown very substantially in all countries. However, small and medium enterprises still make less use of its possibilities for purchases, sales, accountancy and organisation, and many workers have limited STEM (Science, Technology,

Engineering and Mathematics) skills. The issue of STEM, which is viewed as a need for everyone and as an indicator of the skills that everyone will need in the future, is not at all clear for non-technological occupations, which will be the majority of those that will be created using the economic surplus. This certainly raises the risk of routine jobs that are substitutable by technology, if the cost of the substitute technology is lower than the cost of human labour. In addition, technological innovation is not synonymous with good salaries and conditions, the case of 'riders' being a good example. The history of technological innovations, especially in the most recent years, does not suggest that we need to fear an ostensible loss of jobs, but there may well be a sharp downturn in their quality, even in the most developed countries, and they will undergo remarkable transformation. Digitalisation will be responsible for the latter aspect, and globalisation for the former, as it involves competing with the whole planet and very different working conditions. And this is what is going to happen unless there are regional, national and even global policies to prevent it.

As for everyday life, increased use of the internet and smartphones means big changes in communications, relationships, leisure, shopping habits and so on, and spectacular growth has been recorded in all countries from 2005 onwards. However, there are differences between Latin American and European countries, with the latter at an advantage with two exceptions, namely Chile, which is considerably ahead of other Latin American countries, and Italy, which is below the European average. There has also been a spectacular increase in the use of social networks, again with differences between the two blocks of countries, especially for Twitter. But it should be noted that progress here is ambivalent, for although the radius of relationships can dramatically increase, these can be highly superficial. People are able to communicate their thoughts to many more other people, but we are also being exposed to fake news, deception and identity theft.

In the field of education and training, we should highlight the importance of a high level of education in the face of advances in digital technologies. The differences between countries are notable, not only between the two analysed blocks, but also within each block. It is also beyond doubt that lifelong learning will become more and more important in the coming years, due to changes to employment.

Society's Possible and Desirable Responses

Improved labour conditions in the digital economy will at least depend on the following factors: modernisation of the productive structure, which requires investment in R&D&I; a shift towards renewable energies, which will help to face another huge challenge, the climate crisis; and new regulations on employment, taxation and support for unemployment. The State must play a key role here. Experts say that, and so do the European Commission and the OECD. Latin American countries are trailing behind Europe in R&D&I, but not always in renewable energy. Difficulties with regulation (see the informal employment indicator) are a traditional barrier among Latin American countries.

New demands for training will require negotiation between stakeholders, and also for the state to foster the right for everyone to be properly trained from

childhood to retirement. This is an essential issue in order to keep pace with technological change without serious problems being caused in the workplace. The digital revolution is a risk to jobs, both in terms of quantity and quality, but this risk can become an opportunity if society is able to foster the modernisation of the productive structure and training, and especially the continuing education of the workforce.

As for the new panorama for everyday life, the digital revolution opens up many opportunities in terms of communication, relationships, collective action, leisure, consumption, culture, etc. Society must prevent the digital divide from affecting social groups or regions. But beyond this, the public authorities must regulate, monitor and guarantee the privacy of people's data and ensure that nobody suffers abuse or is manipulated by the superpower platforms.

The digital revolution may increase and consolidate the biggest social inequalities in the world. But there is also a very real possibility that they can be reduced with the right tax, labour and investment policies, which should necessarily be global, and here lies one of the problems. Finally, the digital revolution also raises the hope of curbing the climate crisis, our most important challenge of all right now. But it might also make the crisis worse. Whatever the result, it will depend on social movements, social organisations and the people's attitudes, as well as real political will on the part of every country in the world.

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Part III
Social Stratification and Mobility

Chapter 6

The Measurement of Social Stratification: Comparative Perspectives Between Europe and Latin America



Emmanuelle Barozet, Marcelo Boado, and Ildelfonso Marqués-Perales

Abstract This chapter analyses compared social stratification in three Latin American countries (Argentina, Chile and Uruguay) and four European countries (Finland, France, Spain, Great Britain). We focus on both external and internal borders of social classes, as well as on the challenges posed by their analysis for sociology. We compare social classes using EGP6 in relation to a variety of social indicators, to examine how social classes vary among countries. We include debates on production models and welfare state policies to understand the specific configurations and compare the conditions of some of the INCASI countries regarding social stratification. Lastly, we apply a latent class analysis to validate the number of social classes and to recognise class boundaries.

6.1 Introduction

In a scenario characterised by global and accelerated social change, the comparative study of social structures and classes may be considered a major current sociological challenge. New forms of social organisation coexist with old ones, blurring the strata that shape our societies. Nevertheless, because of the rise of inequalities on a global level since the 1980s, there is no doubt that social classes and social stratification have experienced a revival in sociological research. Several areas

E. Barozet (✉)

Centro de Estudios de Conflicto y Cohesión Social, Universidad de Chile, Santiago, Chile

e-mail: ebarozet@uchile.cl

M. Boado

Grupo de Investigación en Estructura, Movilidad y Capital Social, y Desigualdades Educativas (GEMCED), Departamento de Sociología, Universidad de la República, Montevideo, Uruguay

e-mail: marcelo.boado@cienciassociales.edu.uy

I. Marqués-Perales

Departamento de Sociología, Universidad de Sevilla, Sevilla, Spain

e-mail: imarques@us.es

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such as political sociology, social mobility and epidemiology have reinvested in this concept in order to give a better account of wider social disparities, while other forms of social organisation defy current social class approaches. This chapter compares the social structure of three Latin American (Argentina, Chile and Uruguay), and four European countries (France, Great Britain, Finland, Spain). This selection responds to the fact that they are INCASI countries with enough data available to develop our objectives. They also cover comparatively different types of social models.

To date, there no available comparative analysis of social classes among the selected countries, following objectives and methods as we do here. For instance, the International Social Survey Programme¹ has partially included Latin American nations and the World Values Survey,² but does not allow the use of international current stratification schemes. Therefore, the general aim of this work is to compare the social structures of both regions, based on the degree of possible convergence between a set of seven countries. By convergence we are referring to the fact that the social classes have to be similar not only in number, order and proportion. In other words, regardless of the living conditions each social class may have, it means that these are similar in each country; they also have the same magnitude and hierarchy. In international literature on social stratification, there is a certain consensus when admitting that all class positions are organised in the same way, regardless of the society in question. We examine to what degree this statement proves to be true. The invariance of social structures (Inkeles and Rossi 1956) is currently known as the *Treiman Constant* (Treiman 1970, 1975, 1977; Hout and Di Prete 2006) after the North American sociologist who was the first to formulate it systematically.

Our hypotheses are based on the referenced international bibliography. On the one hand, the reliability and support of convergence in social inequality on a global level is expressed. On the other hand, the determination of the economic dimension is opposed to the intervention of welfare policies, which define the subsets of countries. Therefore, the following hypotheses are expressed:

H1 *Social classes present a high level of similarity in their social structures in all the countries analysed.*

Social classes are organised in similar proportions and a similar order in the selected countries. We start from the Treiman Constant which maintains that the way in which class positions are organised is similar in all countries and that, moreover, income, quality of the jobs and living conditions will follow a similar order to that set out by EGP in their version of six classes, following its vertical dimension.

H2 *The economic bases of social classes are disparate depending on whether we analyse Europe or Latin America.*

Although we have indicated that the order in which the classes are grouped is similar, we postulate that the economic bases sustaining them are different in

¹<http://w.issp.org/menu-top/home/>

²<http://www.worldvaluessurvey.org/wvs.jsp>

composition. In other words, as we move from the wealthier countries toward the less wealthy countries, from Europe to Latin America, the welfare level encompasses a lower number of social classes, and, as a result, access to welfare is more unequal. Thus, in Latin American countries, welfare is of a more heterogeneous nature than in Europe. It only reaches those situated in the intermediate classes [small proprietors (IVab) and routine non-manual class (IIIab)] and the service class [managers and professionals I + II]. As stated by Filgueira and Geneletti (1981), these historical processes and social classes are the result of a heterogeneous capitalism and a selective spread of modernisation.

Regarding the structure of this chapter, first, we present descriptive differences between the two continental subsets (Latin American and European), regarding their social class structure, applying the EGP scheme—using only six categories (hereinafter EGP6). We also include their recent regional and national history, using the literature about varieties of capitalism (Hall and Soskice 2001). Second, we focus our theoretical-methodological reflection on social stratification in a comparative frame, in relation with current debates. Third, we set out the model of our comparative analysis between the selected INCASI countries. Fourth, we assess and contrast the differences between Latin American and European countries. This analysis facilitates a better comprehension of the composition of classes measured through the EGP scheme. We use socioeconomic variables to characterise these classes in the selected countries regarding welfare state policies. We then validate the internal consistency of social classes in a comparative perspective based on a latent class analysis in relation to their productive and welfare systems.

6.2 Comparative and Historical Overviews

In this first section, we present key elements of comparison between INCASI countries (Marqués Perales and Chávez Molina 2019), to provide context. We pay attention to disparities between Europe and Latin America, following the literature related to the timing of industrialisation and the frame developed by INCASI in the previous chapters. Gerschenkron (1962) pointed out that late-modernisation processes generated substantial benefits. This means that several countries shortened the industrialisation period by saving innovation costs, which have already been borne by the early-industrialised countries (Ishida 2008). Nevertheless, early industrialised countries have fewer horizontal social class differences than Southern European and Latin American countries, due to the greater presence of more competitive and rational markets.

Referring to the literature on the variety of capitalism (Hall and Soskice 2001), we also present key elements of comparison among the countries included in the INCASI project. In this regard, Maloutas (2009) has pointed out that in Southern European societies, the marginalisation of occupational status affects class attribution. While this is true for Southern European countries, it is even more appropriate regarding Latin American social structures in which the informal labour sector is larger. We also introduce elements such as sex as a variable and gender

relations as a context,³ because they shape economic processes and social stratification differentially in Latin America and Europe.

In general, both regions are free market economies, with democratic governments, centralised educational systems—except Chile—and nuclear family structures. However, the level of efficiency and inclusion of the markets is different, as is the performance of their governments regarding the function of schools and the role played by families. Economic historians have considered that one of the main differences between both continents stems from the different positions they occupy on the world economic board (Prebisch 1949; Cardoso and Faletto 1969; Wallerstein 1974, 2000; Inglehart and Baker 2000). European countries are part of the economic core in which the most lucrative activities of the global market are generated (Maddison 2006). Europe as a whole underwent very early industrialisation, education and secularisation processes which reached the majority of its towns in different degrees, except Spain and Finland, which joined this process more recently and at a more accelerated pace (Barro and Lee 2013; World Bank 2015). In Latin America, these processes occurred later, and the industrialisation was different, particularly in the smaller countries, which did not have a sufficient internal market in terms of demand or did not have an economy integrated with their neighbours. In the past 50 years, economic globalisation processes were of a peripheral nature and in Latin America they had different consequences. The theory of *structural heterogeneity* underscores the coexistence of two differentiated sectors in Latin American countries: a first sector in which labour productivity is high, similar to that attained by the economies of the core countries, and another sector in which the productivity is much lower compared to that recorded in core economies (Pinto 1969; Chena 2009; Solís et al. 2019).

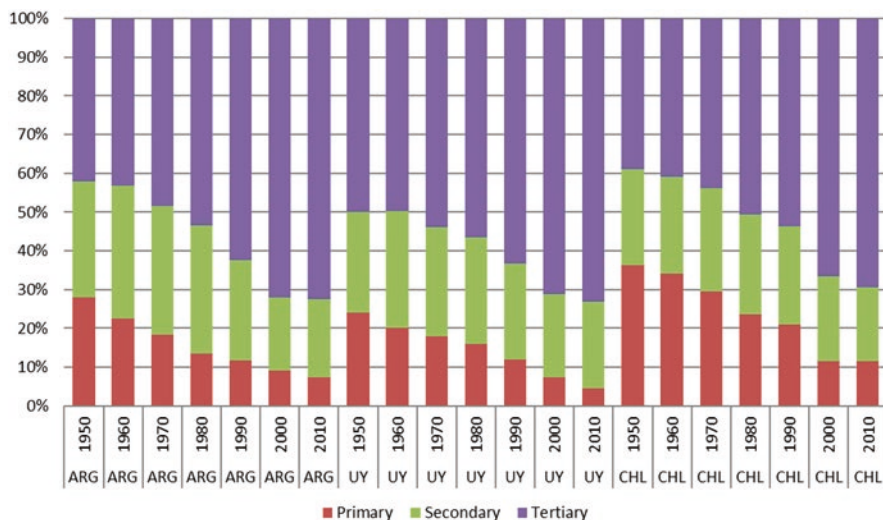
As indicated in Chap. 2, since the economic downturn in 2008 in Europe, income inequality increased, while in Latin America, on the contrary, there was an expansive economic period based on the mass exportation of commodities, which reduced income inequality. The evolution of the Gini index points to a stable social expenditure or a slight increase in European countries, for example, in France, Finland and Spain, and a slight decrease in Great Britain. Meanwhile, in the Latin American countries, the increasing effect of the expansive economic cycle reduced the gap between both Gini, with slight increases in all cases. To conclude, the cyclical—growth—and anticyclical—welfare regime—effects faced by each subset of countries can be observed at the same time.

³We do not include ethnic or racial data in this chapter because not all databases collect this information. Nonetheless, we point out that this is a crucial variable to describe social structures more accurately and explain the internal composition of social classes in most countries. Regarding the frontiers dividing social classes, in addition to traditional vertical differences, the inclusion of more variables (specifically age, territories, place of residence and identities) has given rise to a greater concern for the measurement of horizontal ones, but this goes beyond the scope of this chapter, though we are aware of the importance of these dimensions.

Table 6.1 Typology of social models

Social model	Countries
Neo-corporatist coordinated economies	Finland
Semi-coordinated mixed economies	Spain, France
Uncoordinated economies	Great Britain, Chile
Uncoordinated informal economies	Argentina, Uruguay

Source: Chap. 2

**Fig. 6.1** Sectorial distribution of the EAP of both sexes, selection of INCASI Latin American countries, 1950–2010. Source: Maddison Project

Regarding social models, and using the typology presented in Chap. 2, our two subsets of countries include four of the six types elaborated (Table 6.1):⁴

In order to emphasise the several factors of the stratification process, we now present the historical sectorial distribution⁵ of the *economically active population* (hereinafter EAP) using the Maddison project data from 1950 on (Maddison 2006 version Bolt et al. 2018) *for the nations studied here*.

The three Latin American countries (Fig. 6.1) show a similar pattern of continuous decline both of the primary (decreasing from 25% to 10% of EAP) and secondary sectors (decreasing from 32% to 20% of the EAP). Chile had the largest rural sector in the 1950s and today Uruguay presents the smallest primary sector, lower than 10%. These countries also have a higher and earlier tertiary sector. In Uruguay,

⁴For a detailed description of each model, see Chap. 2. There are differences within these geographical areas. The nature of the institutions is also very different in these territories, but in this chapter, we focus on the comparison.

⁵The three sectors are primary (agriculture and extractions), secondary (manufacturing, power and construction) and tertiary (trade, communications, finance, health, education and services).

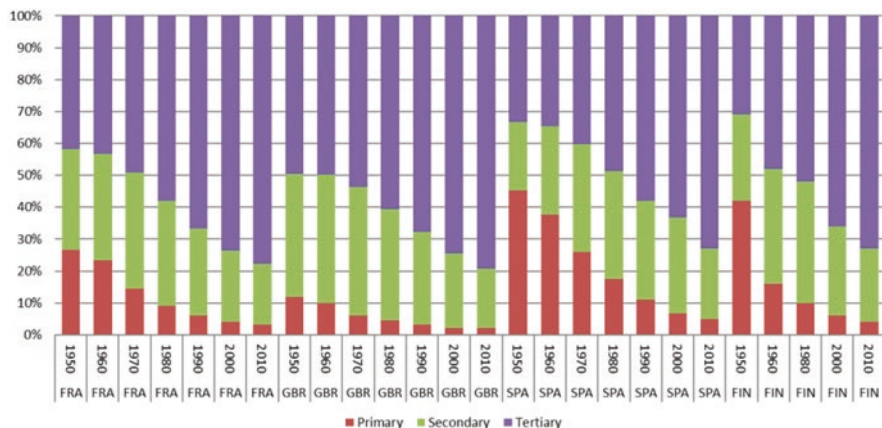


Fig. 6.2 Sectorial distribution of the EAP of both sexes, selection of INCASI European countries, 1950–2010. Source: Maddison Project

this sector has increased from 50% of the *EAP* in the 1950s to 70% today. Argentina and Chile almost doubled their *EAP* in the tertiary sector between 1950 and 2010.

All European countries (Fig. 6.2) in the chart above illustrate the almost disappearance of the primary sector, and a larger and resilient secondary sector than in Latin America. From around 30% to almost 80% in some cases, the tertiary sector has shown a steady upward trend, sometimes faster than in Latin American countries.

Although many differences separate Europe from Latin America, both regions are influenced by similar economic and social forces. Despite having diverse historical backgrounds, the forces driving globalisation—liberalisation of international trade, the quest for technological innovation, the increase in financial capital (Friedman 1999; Castells 1996)—have had a strong impact on both sides of the Atlantic.

6.3 A Theoretical-Methodological Framework for Comparative Social Stratification

In this section, we briefly examine the tools available and the reasons why we chose EGP, as social categories and their measurement are still largely debated nowadays. Specifically, there is a dispute in comparative studies between sociology's definitions and instruments (Grusky 2001) on the one hand, and economics and international institutions focused on the analysis of growth and consumption on the other (World Bank 2015).

We already know how several useful tools (median income, occupational groups, income or consumption segments PPP, EGP, Erik Olin Wright scheme, Treiman status scores, IPICS, among others), show social spaces that vary according to the region and the variables used. Alternative measures for Europe are the Industrial

Table 6.2 EGP6 social classes

Classes	Description
I + II	Service class: professionals, administrator and managers, higher-grade, supervisors of non-manual workers
IIIab	Routine non-manual workers: routine non-manual employees in administration and commerce, sales personnel, other rank-and-file service workers
IVab	Petty bourgeoisie: small proprietors and artisans, etc., with and without employees
V + VI	Skilled workers: lower-grade technicians, supervisors of manual workers, skilled manual workers
VIIa	Non-skilled workers: semi- and unskilled manual workers (not in agriculture. Etc.)
IVc + VIIIb	Farmers and agricultural laborers: farmers and smallholders and other self-employed in primary production, agricultural and other workers in primary production

Source: Erikson and Goldthorpe (1992)

Post-Industrial Social Class (IPICS; Hertel 2017) and the European Socio-economic Classification (ESeC) (Rose and Harrison 2007; Penissat and Siblot 2017). In Latin America, on a comparative basis, we can underline Torrado's class scheme (1998), as well as that proposed by Portes and Hoffman (2003), but they do not facilitate an international and intercontinental comparison. Erikson, Goldthorpe and Portocarero's (EGP) scheme (1992) is widely preferred in Europe, but less so in Latin America. Its application is more flexible and affordable for comparison though than Wright's exploitation typology (1997). Recently, Solis and Boado (2016) pointed out that the use of the EGP scheme has been crucial to add the Latin American case to the international academic debate on social stratification and intergenerational class mobility. In this document we follow the version of EGP categories that the authors compiled in a comparative perspective. They first built an eleven-class scheme and divided it into seven categories. We did the same, but because of sample sizes, we chose to divide the scheme into six categories, EGP6.

In Table 6.2, the social classes appear with a brief description of the groups comprising them.

However, such advances in comparability came at a high price because data was produced by academic teams with no special coordination unit at the time of the application of the national surveys. In Latin America, since there is no organisation generating comparable data—the Economic Commission for Latin America (ECLAC) of the United Nations only collects data produced by the states—the efforts depend on national teams, often universities.

The work carried out by our teams in Latin America considers two waves. First, from 2009 to 2014, in each country, one of the first initiatives is a wave of surveys undertaken by our teams in Argentina, Chile, and Uruguay in the 2000s,⁶ which were later grouped together and compared. In a second phase (2014–2019), we extended the comparison to Western Europe through the coordination of the INCASI

⁶Mexico and Brazil are also represented in this first comparison, but we will focus on the countries studied here.

project. Notable progress has been made towards a common nomenclature in the case of Europe, compared to some dispersion and laborious coordination of the data in the case of Latin America, including a lack of data for some countries. As each nation in Latin America uses different currencies and there are no conversion tables between scholar systems, the statistical work behind our results is more time consuming than with European data. The main characteristics of the surveys used in this chapter are detailed in the Appendix. Data includes individuals who are over 25 years old and under 65 years old.

The goals we set ourselves will be tackled below in two ways. The first part of this research is of a descriptive and informative nature. The purpose of the second part is to contrast and validate. To give an account of the differences in the class divisions between men and women, we will analyse the subsamples of each country separately, since gender relations afford a specific profile to the class structures of men and women (Crompton and Mann 1986).

6.4 Class Structure by Sex in European and Latin American INCASI Countries

In this section, we will compare the social class structure of both subsets of countries. Table 6.3 shows the percentages of men per social class in all the countries selected.

The main difference between the class structure of European and Latin American countries lies in the low proportion of the service class (I + II) in general, and in particular in Latin American men compared to Europeans. While this category in Latin American countries does not quite reach one out of four members as managers and professionals, in European countries it exceeds three out of ten. The administrative, customer service and routine non-manual (IIIab) classes are reduced in both sets of countries, especially among Finnish men. The petite bourgeoisie (IVab) is reduced among European men, except in Spain. In Latin American countries, it is a more frequent class, exceeding the proportion of Spaniards. It is important to consider that there is certain heterogeneity in the composition of this category which includes from small employers to independent artisans. Skilled male manual workers are always the third largest class in all the European countries, and in Chile,

Table 6.3 Percentage of social classes according to EGP6 scheme for male population

Men	France	Great Britain	Spain	Finland	Argentina	Uruguay	Chile
I + II	37.35	36.61	21.99	39.04	17.5	13.9	20.9
IIIab	9.44	6.66	8.43	2.95	10.6	15.3	11.1
IVab	7.35	9.57	12.55	7.88	15.3	9.4	16.7
V + VI	17.94	11.19	16.36	18.59	23.2	23.5	16.4
VIIa	24.44	33.38	33.98	24.62	27.8	27.6	21.7
IVc + VIIb	3.48	2.59	6.68	6.92	5.5	10.3	13.2

Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS

Table 6.4 Percentage of social classes according to EGP6 scheme for female population

Men	France	Great Britain	Spain	Finland	Argentina	Uruguay	Chile
I + II	34.7	27.88	18.46	33.2	27.3	22.1	18.9
IIIab	23.29	26.25	20.01	16.18	20.0	25.0	26.9
IVab	17.14	26.04	25.22	25.21	15.0	16.4	10.0
V + VI	2.6	2.1	5.42	2.4	7.2	5.4	9.2
VIIa	20.01	17.52	27.36	19.1	29.8	26.7	32.4
IVc + VIIb	2.25	0.21	3.55	3.9	0.6	4.4	2.6

Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS

while it is the second in size in Argentina and Uruguay. The class of unskilled male manual workers (VIIa) has a common feature in both sets of countries and its general size is always notable. It is the largest category in Spain, Argentina, Chile and Uruguay, while it is the second in Great Britain, France and Finland. The size of the rural classes (IVc + VIIb), which at present includes small landowners and day labourers, is largest in Chile and Uruguay, coinciding with the abovementioned de-ruralisation of European countries and Argentina.

Table 6.4 shows the percentages of women per social class in the same countries.

The first notable datum for women is that the size of the service class (I + II) in France, Great Britain and Finland is bigger than in Spain and most of the Latin American countries, apart from Argentina. But the sizes of this category in the Latin American countries have fewer gaps with the European ones; and these gaps, which are fewer than in the case of men, show that, despite the smaller size of the service class, there is no restricted access to women in the Latin American countries. In fact, Argentina, Uruguay and Chile exceed Spain. The second fact that stands out in the female structure is the large proportion represented by the administrative, customer service and routine non-manual (IIIab) class. In all the countries, this class is twice the size of the male equivalent in the corresponding countries. If it is combined with the service class, in all countries, apart from Spain, it exceeds 45% of the total class positions, which points to a tendency to polarise the female structure. The third aspect, in the vein of what we have just mentioned, is the size of the unskilled manual class (VIIa) in women. Spain has the largest proportion of unskilled manual workers out of the European countries. To be even more precise, it is the most numerous class for woman in Spain, Argentina, Chile and Uruguay, while it is the fourth in the order of proportions among the other European countries. A fourth aspect points to the common trait in both continents: the low presence of women in the skilled manual work class (V + VI), although in the Latin American countries the participation is slightly higher than in the European ones. Mobility studies indicate that this is one of the posts that is least reproduced among women in any type of country, as it is a predominantly a male position. In fifth place, the class referring to the petite bourgeoisie (IVab) is the second position in size in Spain, and the third in France, Great Britain and Finland; while it is the fourth position in size among the female population from the countries in Latin America. Lastly, the presence of women in the category uniting the rural classes (IVc + VIIb) does not show an

important proportional presence in general in all the countries. However, when the data is linked to the proportion of the similar category in the distribution among men, it is observed that this class does not appear to be preferential for women.

In general, we can summarise the information with the following ideas. First, the main differences between both continents can be observed in the proportion of the service class (I + II); this was also noticed by Solis and Boado (2016) in other data. It is not surprising to observe the greater vigour of the European economies and the presence of the State as a generator of skilled employment, which justifies the greater proportion of managers and professionals of all types. This trend in the European countries is stronger in the male social structure than in the female one. In turn, in the Latin American countries, class I + II are more prevalent, and the opposite occurs in terms of sex, with a wide female prevalence in all countries. Second, in general it can be observed that Spain is the European country that is most similar to the Latin American countries selected. Third, in both continents, the female social structure is polarised, with 45–60% tending to be concentrated in a vast non-manual sector and the skilled manual sector is reduced. This trend converges with that of men in Europe, but it is not similar to men in Latin America. In fourth place, the activity of small businesses representing class IVab is greater in Europe than in Latin America; and it is of more importance especially for women from both continents than for men. In fifth place, skilled manual work (V + VI) is predominantly male in Europe and in Latin American countries. Lastly, despite all the sectorial policies in the European Union, the rural classes are consistently decreasing with people leaving for urban jobs. Only in those Latin American countries where the weight of the exportation of commodities is very significant, despite the lack of agricultural protection policies, a productive and modernised agricultural sector is maintained; this points to the reversion of internal countryside to city migration in Chile and Uruguay, as well as the higher presence of men than women among the small landowners and workers. This aspect, in general, was clear when we observed the secular transformation processes of the EAPs occupied in the selected countries: the de-ruralisation was more severe in Europe than in Latin America, as was the resistance in the industrial sector.

With a view to verifying to what extent the social structures of the selected countries are similar, we have compiled a matrix of nominal contrasts with the statistic chi-square (χ^2), as can be observed in Table 6.5.⁷

As regards men, Spain does not have statistically significant differences in the proportions of its class structure compared to Argentina, Uruguay and Chile, or Great Britain out of the European countries. There are differences of between 0.06

⁷We set four levels to accept the convergence hypothesis: 0.001, a very low probability value, indicates that χ^2 has a very large discrepancy from the expected value; from 0.01 to 0.05, indicates a significant difference, in other words, that χ^2 is less than in the previous case; from 0.06 to 0.10, a less conservative interval, and indicative of a lower χ^2 value than the previous one, but as a result of randomness in the samples it could indicate a possible difference; and lastly, we categorise with a “No” all the results of contrasts with a very small χ^2 and p values that exceed 0.101 and go up to 1.

Table 6.5 Contrast matrix χ^2 among the social structures of selected countries

	SPA	FRA	GRB	FIN	ARG	CHL	URY
Men							
SPA	1		–	–	–	–	–
FRA	*	1	–	–	–	–	–
GRB	No	No	1	–	–	–	–
FIN	*	No	**	1	–	–	–
ARG	No	**	**	**	1	–	–
CHL	No	***	***	*	No	1	–
URY	No	***	***	**	No	No	1
Women							
SPA	1		–	–	–	–	–
FRA	No	1	–	–	–	–	–
GRB	*	No	1	–	–	–	–
FIN	No	No	No	1	–	–	–
ARG	No	No	**	*	1	–	–
CHL	*	**	***	***	No	1	–
URY	*	***	***	***	No	No	1

Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS. *** 0.00; ** 0.01–0.05 *0.06–0.10

and 0.1 with France and Finland. Once again, it is corroborated that there is an intermediate position of class structure inequalities among the two subsets of countries. France does not present statistically significant differences in its classes compared to Great Britain and Finland. Compared to the three Latin American countries, the European nations—except Spain—do have notable and valid differences with p values less than or equal to 0.05. The differences between Great Britain and Spain and France for men have already been mentioned; however, there is a significant difference with Finland. It is important to mention that, for men from Latin American countries, there are no statistically significant differences between their social class structures; they are quite similar despite the aspects mentioned at the beginning of this section.

The contrast for women is somewhat dissimilar. Spain does not present statistically significant differences in terms of social class structure compared to France and Finland in Europe, or with Argentina in Latin America. It also shows differences at the cusp of statistical significance with Great Britain, Uruguay and Chile. France does not have differences compared to Spain, Great Britain or Finland as regards female class structure, or with Argentina. On the contrary, there are significant differences, with p values less than or equal to 0.05, compared to Chile and Uruguay. Great Britain and Finland do not have significant differences between their female class structures, but they do with the three Latin American countries, although it can be observed that between Finland and Argentina there is not a very convincing difference.

In short, as regards the female class structure, the Latin American countries are not a block like in the male case, or like the European countries in general.

Uruguay and Chile are clearly dissimilar for women compared to the sizes of the European classes and compared to Argentina. Thus, Argentina plays an intermediate role, like France, Spain and Finland in the female aspect of class structure, perhaps in a more evident way than Spain as an intermediate country in the male dimension.

As a first step towards the conclusions, we observe that the reach of the Treiman Constant indicated as a starting hypothesis is weak. The Latin American countries, in the context of men, are clearly separate from the European countries, even when Spain has an intermediate position, not very distant from the former, but similar to the latter. However, in the context of the comparison of the class structures protagonised by women, although the results do not contribute towards sustaining the Treiman hypothesis, the panorama is different: the European countries are further removed at the start and Argentina is similar to three of them, France, Spain and Finland, while it clearly differs from Chile and Uruguay.

6.5 Compared Social Classes: Method and Contrast of Contents

Now we will show that the presence of heterogeneous social protection regimes in both continents serves to enrich the debate on social structure, with several social groups being “mobile targets” for social stratification studies (Esping-Andersen 1990; Chauvel 2006), as shown by recent research in Europe and Latin America performed by the INCASI team. Esping-Andersen underlined the fact that standard social schemes have been devoid of institutional elements. He noted that orthodox class schemes are like overlapping “institutionally nude” worlds in a comparative perspective, though one might expect a greater degree of accuracy in their application to national contexts. The fact that standard classifications have been taken as a point of arrival rather than as a starting point has further fuelled this lack of institutional dimension (or of historicity). While it may be in accordance with the fact that individuals (employers and workers) by means of rational decisions form aggregates (classes), it is no less true that this balance can be modified by collective action and social policies. Also, state policies have an impact on social stratification as the result of a balance of power (Korpi 1983). With this in mind, we selected relevant variables to examine how the composition of social classes varies in each country (Table 6.6). Let us remember that, of the European countries, Finland is an

Table 6.6 Summary of variables selected by social class

Variable	Categories
Net family income	Deciles
Seniority in employment	Continued years in the workplace
Size of the company	Small, medium or large firm
Public-private sector	Public-private
Education in terms of knowledge and skills	Isced level 0 a 2; 3; 4; 5 and more
Subjective perception of income	Person who claim to have economic problems

example of the Nordic universal welfare regimes. In other words, a sample of the group of countries with a neo-corporatist coordinated economy; Spain and France represent the Mediterranean regimes in Europe (Moreno 2006), with semi-coordinated mixed economies and Great Britain represents the liberal model based on the market (Esping-Andersen 1990), in other words, a non-coordinated economy. In turn, Argentina and Uruguay correspond to the Latin American model, that is, non-coordinated informal economies, while Chile corresponds to the liberal model, like Great Britain, that is, a non-coordinated economy.

Below, we will cross social class with other variables that give an account of the economic and welfare conditions of these seven countries. We understand that the economic variables clearly indicate the *associated life opportunities* of each social class. Our work hypothesis is that these variables are distributed in the same order as the social classes from the EGP6 scheme. As we use individual variables and others that represent households, we use the head of the household as the social class referent.

First, to give an account of the economic capital of families, we work with deciles of net family income. Second, we analyse the differences in terms of seniority in employment, to determine to what extent social classes have constant and secure income. Third, we analyse the size of the company, because the size of companies is associated with productivity. In particular, it is appropriate to analyse to what extent the members of each social class work in large establishments. As regards the economic sector, the size of public employment must not be forgotten, because it grants better protection than private employment. Fourth, we consider education in terms of knowledge and skills. As a proxy variable we use educational level (ISCED), which is also a channel of social mobility in our societies. It helps to establish how human capital stock is distributed among the classes of a certain society. By including this variable, we consider education not only as an outcome variable of social class, but as a generating variable. Lastly, we add the subjective perception of income. With this variable, we seek to determine to what extent the abovementioned economic conditions unequally affect the position of individuals in the different social classes.

6.5.1 *Income*

With the graphs included in Fig. 6.3, we analyse the economic bases of social classes. For each country, the mean of the household net income decile is presented for each social class and according to sex, scaled in the mean of the deciles of the net household income distribution, regardless of the sex of the household head. The mean is incorporated as a reference.

First, in all the countries selected, the service class (I + II) is first, followed by the routine non-manual class (IIIab) in second place, the petite bourgeoisie (IVab) in third place, manual work (V + VI) in fourth place, non-manual (VIIa) in fifth place and, lastly, the agricultural population (IVc + VIIb).

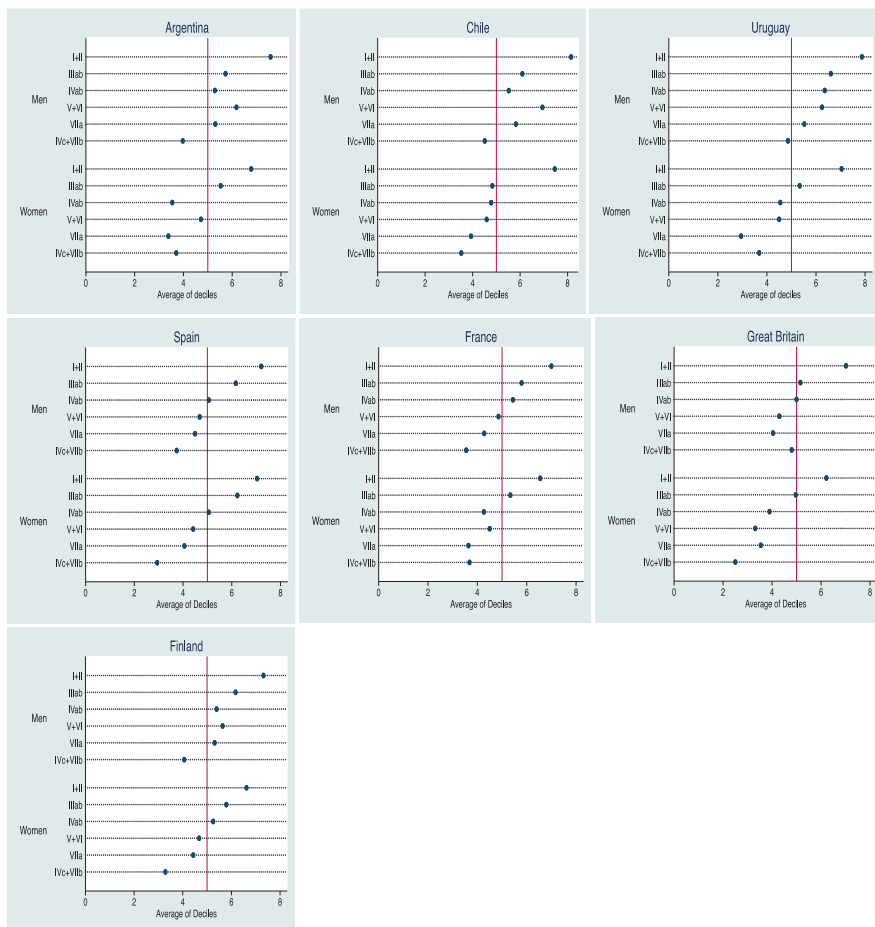


Fig. 6.3 Mean of deciles by family net income and by country. Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS

Second, in general, classes I + II, IIIab and IVab are above the mean in nearly all the countries. In Spain, Great Britain and France these classes are above the mean for men and women alike and the other countries are below the mean. In turn, in Argentina, Uruguay, Chile and Finland, most of the social classes comprised by men are above the mean. In Argentina, Uruguay and Chile, the mean income of all the social classes of men except IVa + VIIb is above the national mean. This is never observed for women.

Third, although the income is organised in a similar fashion per social class for men and women in the European countries, despite slight differences, it can be observed that the same classes are above or below the mean.

Fourth, and examining the results in greater detail, the discrepancies according to sex can be observed per class. In the same social class, women are situated in lower deciles values than men. This is further accentuated for women from Latin America. In Chile and Argentina, the order of the mean income per social class is slightly modified as a consequence of the higher score of specialised labourers (V + VI), similar to small employers (IVab). Uruguay, in turn, presents a very similar organisation of class according to income to that of the European countries for men and women.

6.5.2 *Seniority in Employment*

Another fundamental dimension when giving an account of the economic bases and the life opportunities of a social class is the security with which people's existence can be guaranteed. It is important to know how stable the jobs in each social class are. To do so, we study the continued amount of time the members of each social class stay in their job, using seniority measures in the position. In Fig. 6.4, the data obtained for seniority in the job per social class and per sex is shown for the countries selected.⁸

First, large discrepancies cannot be found in the total mean seniority in the job. One of the constants is in agricultural employment which, as could be expected, has higher employment means in almost all countries, except in the case of French women. Likewise, the service class, more in the case of men than women, has an advantageous position. Although it is also certain that the administrative class always has similar years of service, apart from men in Finland. Second, another difference between Europe and Latin America concerns the petite bourgeoisie: while in the European countries, the length of time in jobs in this social class is low, in Latin America they are longstanding and more stable jobs than in Europe.

It is sustained that the longest seniority and therefore the best life opportunities should be in the service (I + II) and routine non-manual (IIIab) classes. But this is not necessarily the case in all the countries. France has very high seniority in jobs for classes I + II, compared to all the other countries, reaching 15 years in jobs for both sexes. Uruguay is close behind, but the rest of the countries present values close to the general mean for seniority in jobs in these classes.

For men in Spain, Great Britain and France, the shortest seniority in jobs is in small business self-employment, clearly less than the general mean of 10 years, and it is important to remember that this is not a large group among men. This is an unprotected and unappealing job for men. Women from the European countries appear to sustain it with more determination: proportionally there are more of them, and they stay longer in the job.

⁸In this section, it was not possible to standardise all the data. In the case of Argentina, the available base does not differentiate after five years or more in the company.

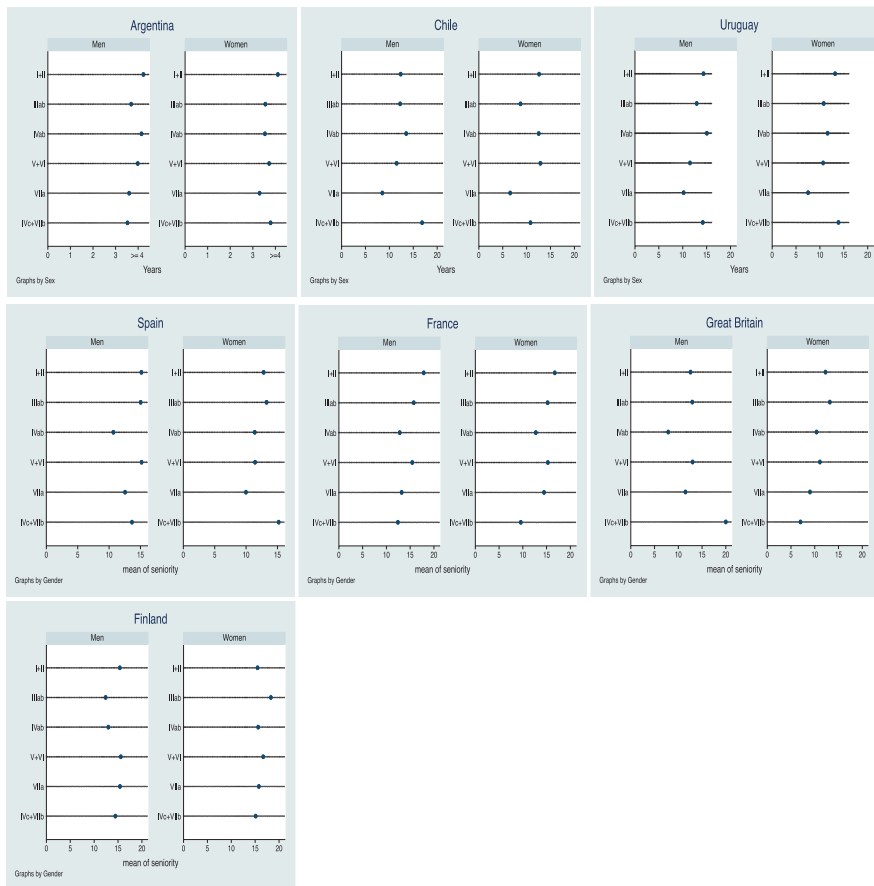


Fig. 6.4 Seniority in employment by sex. Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS

Apart from Spanish and French women, employment in the agricultural class (IVc + VIIb) is lasting for men and women from all the countries examined. The sectorial tendency of the EAP that we mentioned in a previous section contrasts with this. Two observations can be made in this respect: for Europeans, the weight of agricultural compensation policies, while Latin Americans are influenced by the effect of production for the exportation of commodities.

In Uruguay and Chile, both sexes, and nearly all the social classes, have a mean seniority that exceeds 10 years, but VIIa (unskilled urban manual workers) always has the least seniority and this can be observed particularly in Spain and Great Britain, but not in France or Finland.

6.5.3 Labour Market Sectors and Company Size

Working in the public or private sector is an important factor in terms of the stability, protection and security conditions of different jobs. It is internationally recognised that the tendency towards poverty decreases substantially when there is at least one public sector employee in the household.

First, we would like to highlight that public sector employment in the European countries is much larger than in Latin American countries. But, once again Spain has an intermediate position in this case. Second, an international trend is corroborated: for 40 years, more women have been employed in the public sector than men. Third, something that can be observed in both men and women is that, uniting classes I + II and IIIab, they reach 50% of public sector employment, because in all the countries examined they exceed the mean of the sector in terms of the total of EAP. Fourth, and returning to the point that initially highlighted the anticyclical nature of this employment type, here the social force explaining the size of classes I + II and IIIab is corroborated: it is not only a consequence of the productivity of the production factors, or the tax system, or the educational system: there is an effect in itself that is reproduced (Table 6.7).

Company size reflects two interesting aspects for economic bases and life opportunities: the possibility of evolving in the company and therefore of developing a career, and the greater productivity of large companies compared to small ones, promising better salaries and bonuses. Table 6.8 shows the percentage of people who work in companies with less than ten employees.

Table 6.7 Public employment by social class for male and female population

	FRA	GRB	SPA	FIN	ARG	URY	CHL
Men							
I + II	28.76	25	27.55	31.18	38.15	30.57	26.89
IIIab	27.43	43.37	29.41	42.42	26.91	24.95	31.65
IVab	–	–	–	–	–	–	–
V + VI	17.41	13.61	14.98	17.52	18.8	21.13	14.08
VIIa	12.68	12.66	8.71	20.49	19.84	13.64	10.81
VIIb+IVc	20.51	22.86	3.23	14.12	4.36	1.47	0.83
Total	22.11	20.27	16.32	25.12	19.75	16.57	15.51
Women							
I + II	40.55	46.15	42.19	53.96	55.82	51.26	41.24
IIIab	39.81	48.35	35.56	56.73	28.04	25.18	25.48
IVab	–	–	–	–	–	–	–
V + VI	13.79	40	5.88	20	24.3	26.74	11.11
VIIa	15.36	17.71	8.56	27.88	10.84	7.92	16.91
VIIb+IVc	16.67	0	4.08	21.28	9.68	2.15	0
Total	33	40.27	23.8	46.01	25.8	21.66	24.22

Note: Class IVab does not have public employment

Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS

Table 6.8 Proportion of employees in companies of less than 10 employees by country by social class and sex

	FRA	GRB	SPA	FIN	ARG	URY	CHL
Men							
I + II	14.69	16.01	23.69	19.86	32.24	29.94	23.17
IIIab	11.4	8.43	27.87	20	43.65	28.11	48.65
IVab	70.13	49.09	80.23	66.02	94.74	92.32	96.7
V + VI	18.91	18.67	36.84	32.78	56.9	35.42	27.41
VIIa	44.24	37.2	50.31	45.64	53.3	42.25	34.84
VIIb + IVc	65.85	77.14	67.78	82.76	66.79	73.6	57.78
Total	27.59	27.17	44.98	35.46	56.68	45.63	48.28
Women							
I + II	21.35	16.31	30.71	18.78	30.94	25.44	21.28
IIIab	22.12	11.84	34.72	22.94	54.01	34.58	54.46
IVab	47.37	29.37	61.34	38.06	96.3	94.97	98.44
V + VI	46.67	40.74	51.43	30	63.59	39.25	53.65
VIIa	44.15	40.07	60.32	48.51	82.22	70.68	77.42
VIIb + IVc	60	75	45.1	81.63	52.54	76.14	41.67
Total	31.58	22.74	48.72	31.66	63.24	52.5	62.65

Note: Class IVab does not have public employment

Source: ESS-4 and 5, ENES (Argentina), ENES (Chile), ELPS

First, the data show that most women and men in Latin America work in small companies of up to 10 employees. On the contrary, in Europe, apart from Spain which stands at approximately 50% in each sex, the majority of members of any social class work in a company of 10 or more employees. Second in the service class, large companies also prevail. Third, most of the members of the IVab class are self-employed. In Europe, men and women from this social class work preferably in small companies. In turn, in the countries from Latin America, both men and women work exclusively in small companies. Fourth, classes I + II in Europe are concentrated in jobs in large companies at a slightly greater proportion than their counterparts in Latin America. Fifth, class IIIab in Europe prevails in large companies, with the proportion of men being slightly higher than that of women, while in Latin America, the distribution is approximately half and half. Sixth, skilled manual work, represented by classes V + VI, for men and women in Europe, is concentrated in large companies, but in Latin America, half are in companies of 10 employees or less. Unskilled work does not include large companies. On both continents and in both sexes, class VIIa is a large social group that participates very little in the productivity and the other benefits of large companies.

6.5.4 Education

One of the recurring questions about educational expansion on a global level is whether this growth has effectively redistributed social, educational and economic opportunities. A position that is consistent with the Treiman Constant would clearly

deny that this is possible, because the results would always produce the same class or status inequality. It could be worse, since the perspective of the persistent inequalities would indicate that the opportunities were unequally distributed, and the redistributive effect of education would slip away between the borders of classes and welfare (Boudon 1983; Shavit and Blossfeld 1993). We can observe the current situation as an indicative result (Fig. 6.5).

The expected effect of education in the selected countries is not necessarily homogeneous, although regularities and differences can be observed. First, it is important to remember that, after the Second World War, apart from Spain, the selected countries improved the national educational systems substantially with large investments, alongside a systematic widening of the access to primary and secondary education.

For comparative purposes, all the educational levels of each country were codified in the UNESCO ISCED categories. Although we know the difficulty that this means, the benefit of making the comparison outweighs the difficulty. In this case we use ISCED with four categories: completed primary education (Level 0–2), completed secondary education (Level 3), graduated from secondary education or any non-third-level post-secondary education (Level 4) and entered university or any third-level education, even if they did not complete it (Level 5 and more).

As can be observed, access to university has gained strength in Latin America, but it has mainly been accessed by the classes I + II. It is notable that education up to the end of primary is the most frequent educational achievement of classes IVab, V + VI, VIIa and IVc + VIIIb in both sexes for the three Latin American countries. In Europe, the situation is no different. Differences can be observed in Spain and Finland, where women from class I + II have accessed higher education en masse. In Great Britain and France this is slightly different and on a lower scale. Men in all cases are behind women in access to university in this class. Low education prevails for men and women in rural occupations, but, as we have already seen, there are not many women in this occupation; the majority are men in the rural environment. The reach of secondary education, considering the legal requirements for many jobs in Europe—not so much in Latin America—is fundamental and stable for men and women. For classes IVab to VIIa, advancing to said level is predominant. The next level, which is pre-university and higher vocational training, is more moderate in Europe. Here a problem of category treatment can arise. In Latin America, a lot of people finish secondary education and obtain their diploma and do not continue to higher education unless it is free (except in Chile). In Europe the decisions appear to have been made earlier, and those who access one level complete it and follow on to the next one, unless the apprenticeship system is in force and higher education is fee-paying, like in Great Britain. In any case, it is important to understand that in Europe the segmentation of the labour market and its educational correlate is much more defined than in Latin America.

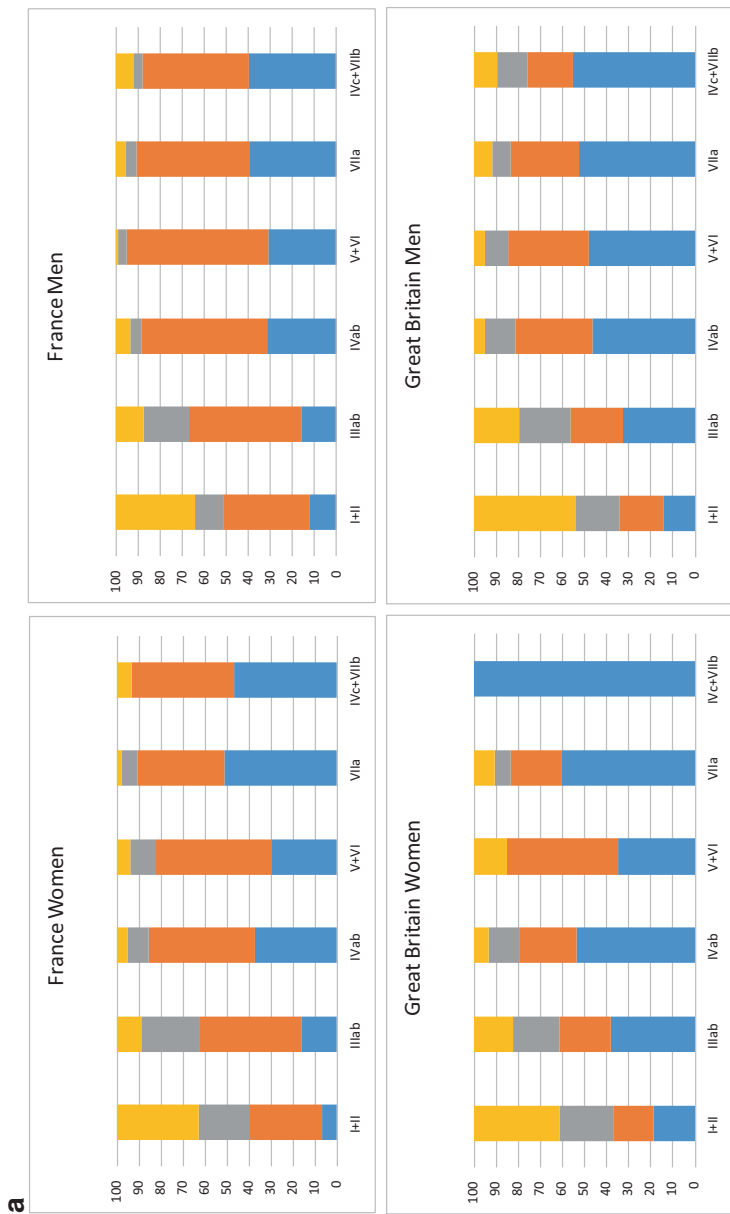


Fig. 6.5 Education level by social class and sex. (a) European countries. Source: ESS-4 and 5. (b) Latin American countries. Source: ENES (Argentina), ENES (Chile), ELPs

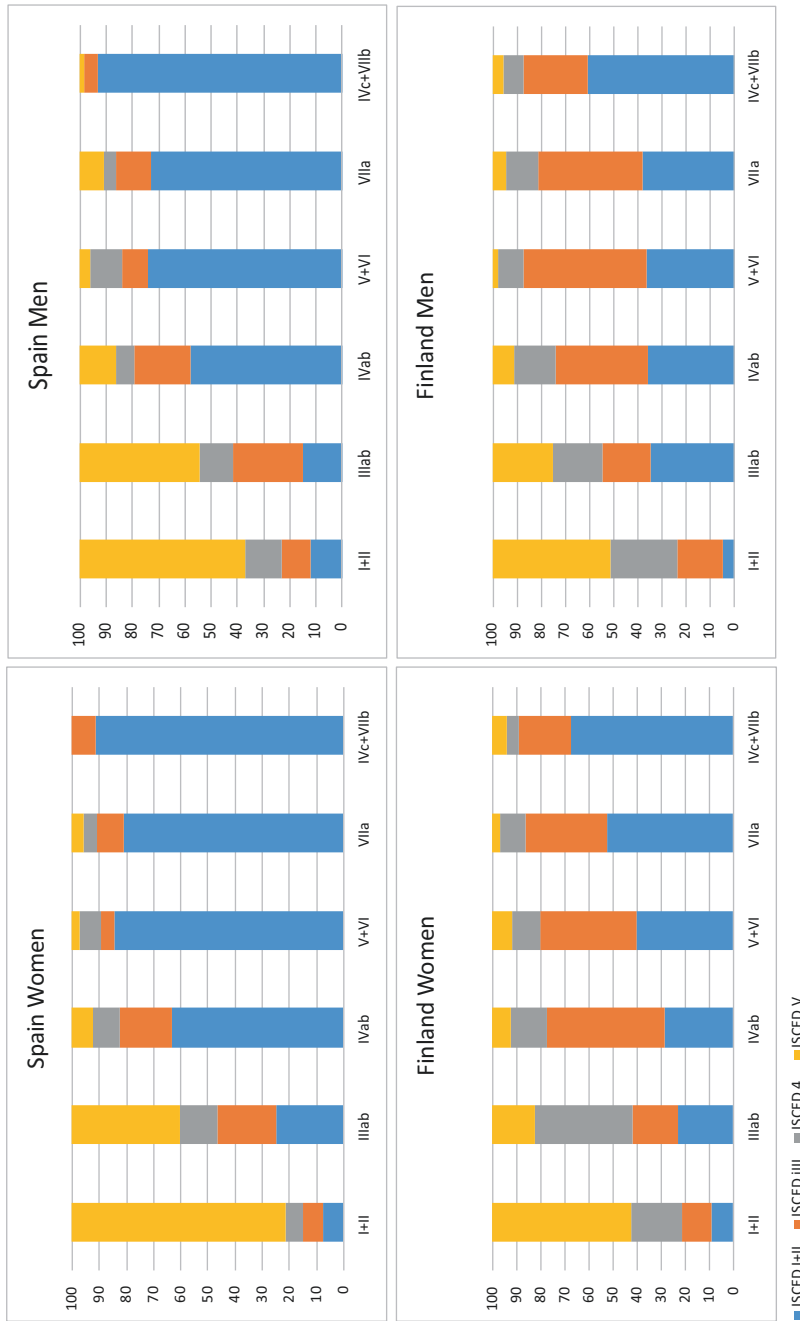


Fig. 6.5 (continued)

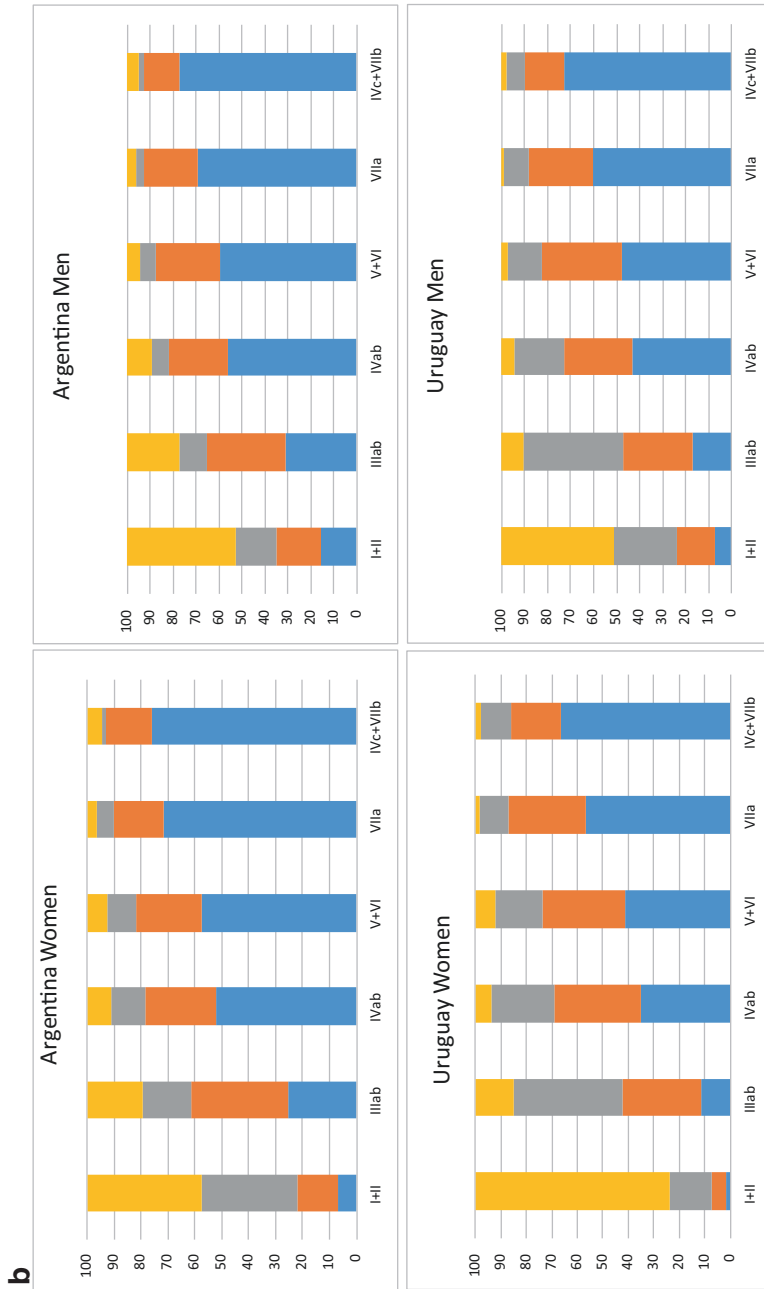


Fig. 6.5 (continued)

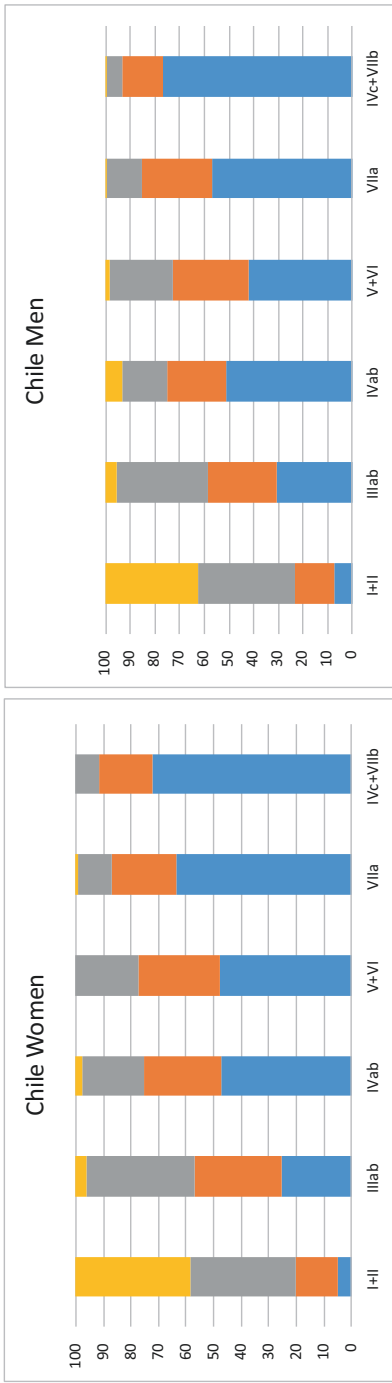


Fig. 6.5 (continued)

Table 6.9 Proportion of people who claim to have economic problems, by social class and sex

	FRA	GRB	SPA	SPA	FIN	ARG	URY	CHL
Men								
I + II	7.87	2.2	6.72	6.72	8.78	13.21	9.26	10.55
IIIab	17.58	14.58	13.24	13.24	5.13	17.59	9.45	14.09
IVab	17.95	8.99	14.68	14.68	3.28	16.36	16.42	27.52
V + VI	21.59	1.72	23.29	23.29	4.48	19.44	9.36	22.11
VIIa	22.22	9.85	18.94	18.94	6.33	15.79	18.82	21.28
IVc + VIIb	30.00	0	20.95	20.95	10.81	38.1	16.57	32.09
Total	15.5	6.02	15.15	15.15	6.73	17.25	12.69	20.14
Women								
I + II	10.24	4.18	8.47	8.47	3.47	13.48	12.62	12.39
IIIab	24.47	12.78	13.22	13.22	4.62	17.39	17.78	15.22
IVab	15.38	5.71	11.48	11.48	10.81	20.34	15.22	18.69
V + VI	20	0	25	25	0	33.33	14.85	26.32
VIIa	26.56	14	32.71	32.71	11.36	32	25.16	25
IVc + VIIb	25	0	11.54	11.54	5.56	0	20.59	40.91
Total	19.31	8.22	16.49	16.49	5.24	18.79	18.3	22.01

Source: EWCS (2015) and Barómetro de las Américas (2010)

6.5.5 Subjective Perception of Income

In this section, we show the results obtained regarding the subjective perception of income per country and sex. Table 6.9 shows the percentage of people indicating some or great difficulty making ends meet.

Spain and the Latin American countries have greater insufficiencies than the other countries, both for men and women. However, on this occasion, France joins this block. Almost 20% of French women consider that their salaries are not sufficient. This value is higher than in Chile and Uruguay. In general, the differences with Finland and Great Britain are, in this case, very marked. According to social class, it is people working in the agricultural sector and labourers, skilled and unskilled, who state that they have more problems, as expected.

6.6 Validation of Social Classes Through Latent Class Analysis

On a general level, we have examined the distribution of classes in the EGP framework, observing convergences and divergences. Next, through a set of variables, we have highlighted the economic, social and educational aspects that bring content and substance to the EGP framework. Now we will use a latent class analysis to validate the number of social classes as a way of recognising class borders.

First, we present the results for the European countries. Subsequently, these findings and its internal traits will be compared with those obtained in Latin America. The latent class analysis is a classifying technique that serves to find, through the estimation of conditioned probabilities, underlying groups in a set of data (Magidson and Vermunt 2004). This is done through the construction of unobserved categorical latent variables. Likewise, this analysis contains objective criteria that guide the determination of the number of groups, namely, in our case, the different social classes (Kaufman and Rousseeuw 1990). Thus, we can estimate parameters that provide us with information about which is the most correct number of groups. Specifically, as we have pointed out in the hypotheses, our prediction stands at approximately six social classes according to the EGP framework: directors and professionals, routine non-manual jobs, petite bourgeoisie, skilled and unskilled labourers and agricultural workers.

The mathematical notation of the latent class analysis is as follows (Monroy et al. 2009). With π being the probability, x_i the latent variable with t categories and with T being the total number of cases of the latent variable, then, $\pi(x_i)$ is the probability that a randomly selected individual will belong to the latent class t ($t = 1, 2, \dots, T$) and $\pi(y_i|x_i)$ is the probability of an individual having value i in the variable y considering their belonging to class t in variable x .

Consequently, $\pi(y_1 y_2 y_3 \dots y_j | x_i)$ is the joint probability of a series of response values considering the belonging to class t in variable x_i .

Formally, the latent class analysis is expressed in the following way.

$$\pi(Y_i | y) = \sum_T \pi(x_i = t) \prod_J^{j=1} \pi(Y_{ij} = y_{ij} | X_i = t) \quad (6.1)$$

Where Y is the declared variable for case i , Y_{ij} the declared variable for case i in variable j , with J number of variables in the model and X_i latent variable t which indicates a particular latent class with T numbers of latent classes.

The statistical adjustments used in the latent class model are the Bayesian Information Criterion (BIC) and the Akaike Information Criterion (AIC), whose expressions are as follows:

$$\text{BIC} = 2(\log)L + q(\log)N \quad (6.2)$$

$$\text{AIC} = 2(\log)L + 2q \quad (6.3)$$

In which q is the number of parameters of the model and N is the total number of units. Those models presenting a lower BIC and AIC will obtain a better statistical adjustment (Table 6.10). A lower BIC means the best option when choosing a specific number of groups. As an example, if in Spain the lowest BIC reaches three groups, this means that they do not need to be further reduced or increased to give an account of the majority of their variation in terms of the variables studied, namely, educational level, employment sector, sex, unemployment, seniority and company size.

Table 6.10 Fit statistic for the different classes by country

	SPA	FRA	FIN	GRB	ARG	URY	CHL
1 class	47,750	47,639	49,222	52,316	90,850	68,158	24,181
2 classes	46,853	47,084	48,461	51,337	87,055	65,420	23,187
3 classes	46,679	46,823	48,335	51,068	86,237	64,481	22,923
4 classes	46,721	46,813	48,336	51,109	86,089	64,310	22,903
5 classes	46,761	46,809	48,374	–	86,030	64,209	22,940
6 classes	–	–	–	–	86,018	64,184	–
7 classes	–	–	–	–	86,019	64,249	–

Source: EW, ENES (Argentina), ENES (Chile), ELPS

Bold values indicate the best score (indicated by the lowest BIC in each country)

The best group (indicated by the lowest BIC in each country) is three classes for the European countries, six classes for Argentina and Uruguay, and four for Chile. In Europe, the first of these groups is made up of the substratum with best employment conditions. Its size varies according to the country. In Spain, it reaches 17% of the entire sample and in France 18%. On the contrary, for Finland and Great Britain, it reaches 34% and 33% respectively. These groups mainly represent managers and professionals of large companies, many of them employed in the public sector, with income above the mean, seniority in their jobs and with low unemployment. They are mainly men, but women are also widely represented.

The second of the classes is very varied, both in size and composition. In the case of Spain (31%) and Finland (34%), it is made up of members of the service and routine non-manual classes. In addition to these groups, in Great Britain this set consists of vast sectors of small employers. In France, skilled industrial workers would have to be added, as well as the *petite bourgeoisie*. Contrary to the members of the first cluster, they work in the private sector, many in small companies and apart from in Finland, their salaries are below the mean salary. A difference compared to the first group is that the number of women is higher, and their education exceeds, in all cases, the basic levels. The third group is made up of manual workers, skilled and unskilled, agricultural and non-agricultural. For Spain and Great Britain, it also includes a fraction of the *petite bourgeoisie*. Its size is approximately 30% apart from Spain where it reaches 51%. The working conditions are characterised for being worse than the other two resulting groups.

For Latin America, the case of Chile is different from the case of Argentina and Uruguay. In this country, only four classes were obtained. A first cluster is made up of an analogous group to the first one obtained in the European countries, but smaller (7%). A second group (24%) corresponds to members of the service class, but from the public sector, in addition to skilled manual workers. The third group (17%) is made up of the *petite bourgeoisie* and the agricultural sectors with income below the mean, but with long seniority in the job. The fourth class that encompasses most of the population (52%) has the worst working conditions and is made up of both routine non-manual workers and unskilled manual workers. This class also consists principally of women and presents a higher number of unemployed people.

Argentina and Uruguay have six latent classes. In Argentina, the first of these (15%) is made up of members of the service class, and to a large extent, women. The second (32%) by skilled workers and workers in the agricultural sector of any type, who are above the mean wage and have long seniority in their jobs. The third group, which is the majority (36%), comprises the *petite bourgeoisie* and unskilled manual workers. In this cluster, the proportion of men is very high. They work for small companies from the low-income private sector but have long seniority in their jobs. The fourth group represents 7% of the sample; it has a majority of men working in small companies, with a low income and good education, with routine non-manual and agricultural sector classes. The fifth group is made up of 7% of the sample, and comprises the routine non-manual class, and unskilled manual workers, with low income, education and little seniority, but it has high levels of unemployed people.⁹ Lastly, a scarce 2% make up the sixth group, composed of women in unskilled jobs, but in large companies from the public sector with an education level above the basic education.

Lastly, the case of Uruguay is also made up of six latent classes. The first of these corresponds to managerial and professional women and the second to managerial, professional men and workers from the routine non-manual class. Apart from sex, the main difference lies in the size: 10% in the case of men and 23% in the case of women. These two groups have the same characteristics as the first of the latent classes in Europe and Latin America. There is also a group (14%) composed of average strata: *petite bourgeoisie* and skilled workers. The main difference with regard to the first two groups stems from the private nature of many of these businesses and their shorter seniority. The fourth cluster (10%) is made up of skilled and unskilled workers. Unlike the previous group, despite working in large companies, their income is below the mean. The next latent class is composed of a scarce 8% and is made up of small urban employers and employers in the agricultural sector and their workers. Lastly, the main group (34%) is composed of part of the routine non-manual class, part of the urban *petite bourgeoisie* and part of the unskilled manual workers. This cluster has a higher number of unemployed people, persons who work for small companies and short seniority; it also has a high number of women.

6.7 Conclusions

According to the Treiman Constant, which states that employment follows the same order in all societies, in this chapter we seek to verify this idea and in turn analyse how similar the social classes in Europe and Latin America are. To do so, we used a diverse set of countries that represent the welfare regimes on both continents. Not

⁹People who had a previous job and could be analysed by describing the characteristics of their previous jobs.

only are there distinctions between Europe and Latin America; within each continent notable differences could also be observed. To give an account of the life opportunities of each social class, we have chosen the following variables: deciles, educational levels, type of workday, type of contract and seniority.

The first conclusion to be drawn is as follows: despite different historical trajectories, distinct welfare regimes and various development levels, the structure organising social classes is very similar. The classification used, which is the one most circulated in social stratification studies, provides a very relevant view of the structure of classes in different countries. However, there are differences. Advanced economies achieve that a large proportion of the population are in the service class. Since the living conditions of this class are much higher than for the rest of the social classes, a large section of the population of these societies has high standards of living. By way of example, while 14% of Uruguayan men belong to the service class, this same figure reaches 40% in the Finnish population. Likewise, it is important to note that there is a larger agricultural population in the countries in Latin America while two countries that underwent industrialisation later such as Finland and Spain still have a large agricultural sector. Likewise, it is important to point out that it has also been demonstrated that segregation according to gender is generalised. The class structure in all the countries selected differs greatly according to whether they are men or women, even for those in nations with a much better equipped welfare state, such as Finland.

The second conclusion refers to the education level attained by the different social classes. In Europe, educational growth has been more intense and, perhaps for these very circumstances, has reached a higher number of social classes. This educational growth has also particularly reached women in Latin America, although in some countries they are behind their European counterparts.

The third conclusion stems from the employment conditions of the different social classes. Here there are not many points of convergence between Europe and Latin America. The working conditions of Latin American countries have more disadvantages than those of their European counterparts, including those from the south of Europe. As we go from more industrialised to less industrialised economies, fewer social classes reach adequate work conditions and more decent life opportunities.

On the other hand, the fact that the statistical indicators of the latent class analysis reflect different amounts of classes also indicates different levels of inequality. Thus, we can observe that Europe's citizens are integrated in three large groups, while Latin America has greater stratification between its classes.

Lastly, it is important to point out that this study provides the opportunity to compare social structures that have rarely been compared. The previous theoretical content has not only enabled us to begin our research, but it enables us to test different theoretical ideas. In those societies with a market economy and a nuclear family, the role of the State does not appear to modify the social class structure. However, according to the level of development taking place, a higher number of classes have better social opportunities.

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Appendix: Main Characteristics of the Data Sources

Latin America	Argentina	Chile	Uruguay
Surveys	ENES/PISAC and AmericasBarometer (AB)	ENES and AmericasBarometer (AB)	ELPS and AmericasBarometer (AB)
Years	2014 and 2010	2009 and 2010	2012 and 2010
Geographic coverage	National coverage	National coverage	National coverage
Population	Population in households across the country AB: over 18 years	Employed persons between age 20 and 64 AB: over 18 years	Individuals over 14 years old in households across the country AB: over 18 years
Type of survey	Face to face	Face to face	Face to face
Sample size	ENES/PISAC: 27803 AB: 909	ENES: 2830 AB: 677	ELPS: 17043 AB: 799
Institution or team in charge 1st survey	Min Ciencia y Tecnología- PISAC LAPOP	Proyecto Anillo LAPOP	Banco de Previsión Social LAPOP
Variables used for the construction of social class	CIUO 88, position, firm size, supervision AB: own classification	CIUO 88, position, firm size, supervision AB: own classification	CIUO 88, position, firm size, supervision AB: own classification

Europe	France	Finland	Spain	Great Britain
Surveys	European Social Survey and European Working Conditions Survey	European Social Survey and European Working Conditions Survey	European Social Survey and European Working Conditions Survey	European Social Survey and European Working Conditions Survey
Years	ESS 2008, 2010 and 2015 EWCS 2010	ESS 2008, 2010 and 2015 EWCS 2010	ESS 2008, 2010 and 2015 EWCS 2010	ESS 2008, 2010 and 2015 EWCS 2010
Population	All persons aged 15 and over resident within private households. EWCS: over 18 years	All persons aged 15 and over resident within private households. EWCS: over 18 years	All persons aged 15 and over resident within private households. EWCS: over 18 years	All persons aged 15 and over resident within private households. EWCS: over 18 years
Type of survey	Face to Face	Face to Face	Face to Face	Face to Face
Sample size	ESS 3451 EWCS 1431	ESS 3890 EWCS 938	ESS 3702 EWCS 3130	ESS 4523 EWCS 1516

(continued)

Europe	France	Finland	Spain	Great Britain
Institution or team in charge	European Commission, the European Science Foundation and national funding councils, Eurofound	European Commission, the European Science Foundation and national funding councils, Eurofound	European Commission, the European Science Foundation and national funding councils, Eurofound	European Commission, the European Science Foundation and national funding councils, Eurofound
Variables used for the construction of social class	ISCO-88	ISCO-88	ISCO-88	ISCO-88

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Chapter 7

Social Mobility from a Comparative Perspective Between Europe and Latin America



Sandra Fachelli, Idefonso Marqués-Perales, Marcelo Boado,
and Patricio Solís

Abstract This chapter presents a review of the analysis of social mobility in the international sphere (Europe and Latin America), with a particular focus on the partner countries of the INCASI network. To date, few studies have linked nations whose economic and social aspects are so dissimilar.

As is usual in the specialized literature, the relationship between social origin and class destination is addressed. This is done by noting the comparisons made across the geographical areas. We review the analyses that have been made of the evolution of social fluidity as well as the distance between social classes within each country and the comparisons made between them.

We compare the main theories that have inspired the study of social mobility to date: modernization theory, which predicts an increase in relative mobility rates, and invariance theory, which postulates the constancy of social fluidity. Special attention is devoted to the role played by the family, the state and the market in late industrialized countries.

We study the difficulties for social change, i.e. upward mobility from one class to another, as well as the likelihood of reproduction in comparative terms. To do so,

S. Fachelli (✉)

Departamento de Sociología, Universidad Pablo de Olavide, Sevilla, Spain

Grupo de Investigación en Educación y Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain

e-mail: sfachelli@upo.es

I. Marqués-Perales

Departamento de Sociología, Universidad de Sevilla, Sevilla, Spain

e-mail: imarques@us.es

M. Boado

Grupo de Investigación en Estructura, Movilidad y Capital Social, y Desigualdades Educativas (GEMCED), Departamento de Sociología, Universidad de la República, Montevideo, Uruguay

e-mail: marcelo.boado@cienciassociales.edu.uy

P. Solís

Centro de Estudios Sociológicos, El Colegio de México, Tlalpan, Mexico

e-mail: psolis@colmex.mx

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we link these mechanisms with the AMOSIT model. The advances in methodology, techniques, theory and data processing are highlighted.

Keywords Social Fluidity · Intergenerational Social Mobility · Absolute Mobility · RCII Model · Social Inequalities · Comparative Analysis

7.1 Introduction

The general objective of this chapter is to contribute to comparative analysis of social inequalities based on an analysis of intergenerational social mobility among the member countries of the INCASI network. The intention of this primary comparison is to lay the foundations for further comparisons that will be broader in terms of countries, and more in-depth in terms of the aspects that are currently associated to intergenerational social class mobility.

This goal will be treated in the conventional manner of such studies, addressing absolute social mobility and relative social mobility. A study of absolute mobility is essential in order for the reader to appreciate how it follows on from the previous chapter and to access the descriptive dimension that highlights the different changes in social structure between parents and children in the studied countries. Meanwhile, the study of relative mobility will focus on analysing the association between social class of origin and the social class reached at the time of the survey, thus permitting an examination of the opportunities for accessing different social classes in each country. These opportunities will also be analysed in a comparative manner, to reveal the contrasting possibilities for accessing different social statuses in each country. This involves the use of techniques to monitor the absolute changes observed and for different sample sizes, and to provide parameters for the effects of interest, both in and between all countries.

Our hypothesis is based on a classic idea drawn from the comparative literature on social mobility in late industrialisation countries. According to Ishida and Miwa (2011: 9), there is a relationship between social inequality and the distribution of opportunities: societies that were late to join the industrialisation process generated greater social inequalities and a more uneven distribution of opportunities for social promotion, which led to less social openness. Hence, according to the authors, “the later and rapid the industrial development, the higher the social inequality and the lower the social fluidity”.

This chapter begins with a brief summary of the theoretical aspects of social class mobility, thus presenting the general framework of analysis and situating us within the extensive extant literature on intergenerational mobility. The theoretical perspectives and principal previous literature from European and Latin American countries are reviewed. At this stage, our goal is to generate dialogue between the earliest and contemporary studies from each continent, which serve as a basis and stimulus for our own study, and on which the working hypothesis for our analysis is grounded. In the following section, we present the methodology, discuss the techniques and detail the databases used for each of the countries. In the fourth section,

we present the results in two clearly distinguished parts, which focus on absolute and relative social mobility. The former entails a descriptive overview and the latter looks in greater depth at how open or closed societies are, measuring the relative opportunities for people from different social classes. The fifth section summarises the main findings and presents the most relevant conclusions of the analysis. The sixth section contains a discussion of the contributions made by this report and recommendations for the network's future research programme, as well as pointing out the limitations of the analysis.

7.2 Theoretical Perspectives and Previous Studies in Europe and Latin America

7.2.1 *Social Mobility in Industrialised Countries*

Since the end of World War II, reflection and research on economic growth and development has been linked to social mobility. Improved standards of living became a shared value in the international community, although ways to achieve it differed, given the rivalry between two systems for organising society, capitalism and communism. However, both models shared a focus on the importance of social mobility and public investment in education, the former as result of positive macro-social changes on an economic and cultural level, indicative of improved life and personal development opportunities, and the latter as driver of access to these opportunities. Hence, achievement was focused on occupational performance and on the redistribution of the means to improve performance in such endeavours.

Twenty-eight years ago, in a study of social mobility, Erikson and Goldthorpe (1992) presented their topography of social theory, which gained major analytical and pedagogical recognition. These authors described three theoretical perspectives on mobility, but for various reasons we can agree to agree that only two of those are still valid today. Together, these two macro-perspectives cover the theory and hypotheses of social mobility: the theoretical tradition of modernisation and the invariance hypothesis called FJH (Featherman, Jones and Hauser).

Sociologists who defended modernisation theory argued that there was a cumulative secular tendency towards development and equal opportunities. Studies like those by Parsons (1951), Kuznets (1955), Kerr et al. (1960), and Treiman (1970) predicted that in the medium and long term, with the social market economy acting as an allocator of resources and opportunities, and with adequate, moderated training and motivation of the workforce, open and unrestricted intergenerational social mobility, equal pay based on meritocracy and remuneration of production factors would be achieved. Different contributions were thereby consolidated, to eventually come together as what was dubbed modernisation theory.

On the other hand, Featherman, Jones and Hauser's perspective (1975) argued that societies with market economies and nuclear families operated with similar mobility systems, and that inequalities therefore persist across countries. Initially, the national studies by Goldthorpe (1973, 2003), Goldthorpe et al. (1987) led the

way in social class mobility studies, and developed the debate on social class mobility in industrial and post-industrial society. And this naturally touched on the kind of development in each country. The counterpoint was the stability or instability of social class intergenerational mobility as a consequence of the different forms of industrial development.

Erikson and Goldthorpe (1992) proposed the theory of constant social fluidity (CnSF) for the case of change over time, or the common social fluidity model, which maintains that relative mobility rates are similar when comparing between countries. Constant fluidity theory is a model for associating between origins and destinations with two variants. On the one hand, it analyses the effect of the cohorts or generations of interviewees on social mobility where the “model of uniform differences” (Unidiff) is identified. And, on the other hand, the Core Model of mobility and social inheritance was identified, emphasising some relationships between social classes related to inheritance, class boundaries, sectoral changes, and short-distance movements between social classes.

Breen (2004) presents evidence of changes in relative opportunities by observing a general decrease in the strength of inequalities when analysing eleven European countries through 117 surveys conducted between 1970 and 1990 that practically cover 60 years of the twentieth century. In terms of absolute mobility, Breen notes two major transitions, the first from agriculture to an industrial society evidenced by the decline in rural classes. Secondly, the shift from industrial society to post-industrial society is observed, as reflected by the increase in classes I + II and III and the decrease in V + VI and VIIa. In terms of relative mobility, Breen is able to observe changes in fluidity in a large number of countries, although this trend is not univocal, since certain countries continue to show constancy, such as men in Great Britain, Ireland and Norway and British and German women.

The findings on the trends in social fluidity are far-reaching, for Breen produces further support for them in a more recent study (Breen et al. 2020; Breen in Salido and Fachelli 2020).

He expands upon classic mobility studies by including the new concept of counterfactual models, an innovation that he developed in 2010 that values the important role of education in intergenerational social mobility trends. The implementation of these techniques leads him to affirm that the expansion of education programmes and more equitable distribution thereof with respect to social origins were the most important factors behind the increase in social fluidity. Breen claims that for the cohorts born in the first half of the century, it is modernisation theory that comes out best, while reproduction theory would best fit the behaviour of cohorts born in the latter part of the century. He therefore maintains that the analysed results cause him to doubt the accuracy of the two rival theories on mobility and proposes the generation a long-term perspective on intergenerational mobility (Breen 2020).

Ishida and Miwa strove to expand the comparative context between countries with different levels of industrial development, and this was one of motivations for our own work. These authors developed a typology that distinguishes early industrialised countries from late industrialised countries. The study coordinated by Ishida in 2008 studies six late industrialisation countries, namely Japan, Taiwan, South

Korea, China, Brazil and Chile. A later study (whose findings were reported in 2011 in an unpublished document by Ishida and Miwa) broadens the comparative scope by adding to the six aforesaid countries, those studied by Breen, to also include Israel, Mexico, Italy, Hungary, Ireland, Poland and the United States, eventually totalling 19 countries and concentrating on men aged 30 and 64. The conclusions to their studies showed that there was no historical convergence in terms of social fluidity, that there is a common pattern of fluidity among nations, and that there is convergence in terms of absolute mobility rates. These studies provide the recent background to support the comparative analysis presented herein.

Finally, a very recent study by Hertel and Groh-Samberg (2019) performs an analysis of 39 countries by exploring the relationship between economic inequality and class mobility, whereby the authors are able to confirm their hypothesis that countries with high levels of economic inequality have lower levels of social fluidity.

7.2.2 Social Mobility and Development in Latin America

Exploration and discussion of social mobility in Latin America has always been associated to studies on development and growth. It almost forms part of the foundations of sociology. But as Solís and Boado (2016) have pointed out, this school of thought was interrupted from the 1970s to 1990s as a result of the political conflicts that affected so many of these societies in that period.

Germani conducted several studies on stratification and social mobility in Argentina. Here, we will refer to the one published in 1963 as an appendix to the Spanish translation of the study by Lipset and Bendix that was published in Buenos Aires. In this article, Germani viewed Argentina as a society that had witnessed a significant amount of social mobility over an extremely long period. There was a first period of major upward social mobility among international immigrants¹ as Argentina received about seven million immigrants² and a second, more recent, period of social mobility among domestic migrants from the rural context to the cities. Germani examined several concepts of social mobility, such as gross (structural and circulatory), demographic and transitional mobility. Gross social mobility is the total amount of social mobility, which can be broken down into two parts, namely the change observed between respondents' classes of origin and destination (called structural mobility) and circulatory mobility (the difference between gross mobility and structural mobility). Demographic mobility is considered to be dependent on the differential birth rate of social classes, which can generate an over-supply of aspirants to upward mobility. And finally, there is transitional social mobility, which was identified in the substantial changes in the structure of

¹As Germani showed in his analysis—and as confirmed by historical demographers after ten years—after the United States, Argentina was the biggest receiver of migration on the planet between 1850 and 1950.

²And Uruguay 500,000 in the same period.

employment, social classes and birth rates that happened in Argentina as it shifted from a predominantly rural, agro-exporting society to an industrial, urban one.

Germani had faith in the transformative power of education, which should provide the support for general social mobility, for it was not only the means with which to provide knowledge to the population, but also to foster the new mentalities that are required in order to attain modernity. That is what had happened in Europe. However, as a consequence of transitional mobility, he warned that in Argentina there may or may not be a correlation between social and educational mobility. This is a matter that concerned him, because a conflict could arise if new class positions were to impose themselves over those promoted by general and meritocratic social mobility, typical of industrialisation. This reflection would accompany him in future years, and from the evidence he collected, he shows that educational mobility did not affect social mobility, so there was no direct correspondence.

Labbens and Solari (1966) examined social class mobility in Montevideo, obtaining several estimates. These authors had fewer secondary sources than Germani to corroborate their evidence, but concluded that Montevidean society had also experienced significant total social mobility. In that year, 44% of Uruguay's population was concentrated in Montevideo, reflecting the major weight of international immigration and migration from the countryside to the city, as in Buenos Aires. There were large increases in salaried classes at all occupational levels. However, as a result of the stagnation of economic growth based on the export of raw materials from the late 1950s, the authors hypothesised that upward mobility would face obstacles, and in general, social mobility would be reduced in every way.

Solari et al. (1967) understood that education was important for intergenerational social mobility, but that not everyone would achieve social mobility with it, as observed in Montevideo with data from 1959. They noted that an association between education and occupation can produce unexpected results. The relationship between growth and education is not entirely clear. Depending on the geographic contexts of socialisation³ they note that education did not always lead to occupations of a similar level. For that period, they highlighted how economic stagnation could lead to an over-educated population, and this will lead to status incongruity, because many people would be unable to find employment in keeping with their level of education.

More recently, Solís and Boado (2016) ran a comparative study on class mobility and stratification in Latin America that brought together researchers from Argentina, Brazil, Chile, Mexico, Peru and Uruguay.⁴

First, they described the heterogeneity of class structures, expressed in the contrast between Peru, the most predominantly agricultural country, and the other countries that had greater urbanisation and more widespread industry. Second, a common feature of all countries was the limited expansion of service classes,

³There were three: cities, towns and countryside.

⁴The book includes chapters on individual nations for Argentina (Raúl Jorrot & Gabriela Benza), Brazil (Carlos Costa Ribeiro & Patricio Solís), Chile (Vicente Espinoza), Mexico (Patricio Solís), Peru (Martín Benavides & Manuel Etesse) and Montevideo (Marcelo Boado).

non-routine manual and highly skilled manual workers; and consequently a greater presence of classes of unskilled manual and agricultural labourers. These aspects defined the limited number of opportunities offered by class structures for upward mobility. Third, the authors found high rates of absolute mobility (similar even to those of European countries). Fourth, with respect to relative mobility, they concluded that: (a) the general levels of social fluidity did not differ significantly from those observed in early industrialisation countries; (b) Argentina, Chile and Mexico were more rigid with greater association between origins and destinations, but Brazil and Peru had higher levels of social fluidity; and (c) Latin America is characterised by a hierarchical pattern of social mobility, with greater distance between classes and polarisation of social mobility. In Europe, these aspects are dissimilar and more gradual.

Therefore, a balance between similarities and differences must necessarily take into account how polarisation is especially powerful in Latin American social stratification systems, and generates greater hierarchical distances between classes.

Solís and Boado, and the other authors in their national chapters, explored several models for associating class of origin and destination, for each country and comparatively between all of them, with an acceptable fit for the components of the core model in several Latin American countries, and for the fluidity and uniform differences models. But they eventually decided to adjust an RCII model modified by country. This model included the unequal distances between social class of origin and destination, while also considering the influence of class inheritance. This model postulates uneven boundaries between social classes, in origins and destinations, that modulate the possible movements, while also upholding the unequivocal importance of class reproduction.

7.3 Definitions, Data and Methodology

7.3.1 *Definition of Social Classes*

For all countries we agreed to apply the Erikson, Goldthorpe and Portocarrero (EGP) class scheme. For the Latin American countries some modifications were included as suggested and previously used by Solís and Boado (2016). The main modification consists of reclassifying self-employed workers without employees with low-grade occupations from class IVb to class VIIa. This change is made because, in the labour markets of Latin American countries, many of these workers declare themselves as independent, but are really subject to subordinate labour relations, in which they sell their work to one or more employers at the same time in highly precarious and unstable labour conditions (Solís and Boado 2016). For European countries, the classic proposal by Ganzeboom et al. (1992) was followed, which in turn was viewed as the most comparable with the data worked on before

for the Latin American countries presented in this study. The scheme used is presented in Table 7.1.

7.3.2 Data

For Latin America, data was used as approved by several Latin American colleagues who contributed to the study by Solís and Boado (2016). For Europe, we worked with the data from the European Social Survey (ESS) for all countries except Italy, because the variables required to construct the EGP category were not available. Ganzeboon et al. (1992) specifications were followed to standardise classes using ISCO-88. For Italy, we used the Survey of Living Conditions (*Indagine sul Reddito e le Condizioni di Vita*) produced by the National Institute of Statistics and the classification was constructed following the same criteria as the ESS, making the necessary adaptations for such purposes in ISCO-08.

Similar and close age groups were selected for the European and Latin America surveys to ensure that the samples were relatively similar. Although an effort was made to standardise the data, there is no question that this primary comparative analysis could certainly be improved upon. Appendix 7.1 presents the characteristics of the surveys used for each country and the main methods for processing the information on mobility. The Table 7.2 presents the sample by sex.

Note that in order to avoid the influence of different sample sizes, in some operations the samples had to be balanced to the same size for all countries.

Table 7.1 EGP scheme in seven classes used in the comparative analysis

Class (EGP)	Description	Examples	Labour relationship
I + II	Service classes	Proprietors, professionals, managers, higher-grade technicians	Employers, employees, supervisory positions
IIIa + b	Routine non-manual	Office workers, sales workers	Employees
IVa + b	Petite bourgeoisie	Small proprietors, micro-employers	Self-employed and small employers
V + VI	Skilled manual workers	Skilled workers, artisans, manufacturing supervisors	Employees
VIIa	Lower grade manual workers	Manufacturing labourers, unskilled service workers (cleaning, etc.)	Employees (self-employed: informal employees in LA)
IVc	Smallholders	Farmers, farm owners, micro-employers	Self-employed and small employers
VIIb	Agricultural workers	Day labourers, farm labourers	Employees

Source: The authors based on Solís and Boado (2016)

Table 7.2 Sample used

Country	Men	Women	Total
Argentina	3320	2171	5491
Brazil	2631	2113	4744
Chile	1777	1053	2830
Mexico	3938	1732	5670
Uruguay	4325	3415	7740
Spain	2299	2094	4393
France	1980	2048	4028
Great Britain	2903	2235	5138
Italy	9199	8565	17,764
Finland	2166	2141	4307
Total	34,538	27,567	62,105

Source: The authors for Europe; Solís and Boado (2016) for Latin America

7.3.3 *Models and Techniques*

Since eighties Goldthorpe introduced the distinction between absolute mobility and relative social mobility, and subsequently the use of these meanings became widespread in the analysis of mobility using tables in which individuals are cross-classified by class of origin and of destination.

Absolute mobility brought together all the ways to measure social mobility and inheritance by relating cells in the aforesaid table, based on proportions (joint and conditional probabilities) and marginal dissimilarity indexes, among others. Relative mobility brings together all the procedures for estimating parameters that indicated the association between origins and destinations. Such is the case of the log-linear models and considerable developments that the scientific community introduced later, mainly associated to Research Committee 28 of the International Sociological Association.

Our lines of progress shall therefore be in two directions, towards an examination of the volume and characteristics of general social mobility, in order to contrast the rigidity or fluidity between Latin American and European countries; and towards the contrast of the differential effects of social classes on reproduction and social mobility.

We begin with the recognised results on the constant fluidity in Latin American countries as presented by Solís, Boado et al., and we draw on elements from European countries as proposed by Breen (2004), Vallet (2015) and Gil et al. (2017), to standardise the use of powerful models with proven goodness of fit, such as constant association models (which support the hypothesis of constant fluidity) and those of uniform variations (which support the hypothesis of the tendency to inter-generational fluidity or rigidity), to proceed by contrasting the communality between countries in terms of the volume of mobility.

In turn, we shall examine a model that emphasises class inequality, and that we believe, based on the experience of Solís and Boado (2016), to more clearly capture

inequality between classes and its effects on social mobility than the core model, namely Row Column II (RCII).

7.3.3.1 Absolute Mobility

The analysis of social mobility considers a transition matrix that reflects both the forces of global expansion and contraction of certain classes and the propensity to inheritance and mobility between them (Hout 1983; Erikson and Goldthorpe 1992; Breen 2004; Fachelli and López-Roldán 2013; Solis and Boado 2016). Absolute mobility can account both for people who are better situated in the hierarchy or who have improved with respect to their origin (upward mobility) and for those who are lower down in the hierarchy than their parents or who have not yet achieved such a status (downward mobility). Reproduction, inheritance or immobility identify parents and children with the same social status, due to a transfer of occupation from parents to children or simply being in the same position due to a transitory situation. Absolute mobility is understood to mean the mobility observed directly via the frequencies in the table.

7.3.3.2 Relative Mobility: Rigidity and Fluidity

Analyses of relative mobility are concerned with something else. Greater attention is paid to the stability or variation that can be observed as a consequence of the association between origins and destinations. It is a more accurate way of responding to the concern manifested by Glass (1954) regarding social mobility and its plausibility. The authors have put every effort into overcoming the weakness of perfect mobility to generate hypotheses and models that capture the effects of inheritance and opportunities, and thereby present a more plausible explanation. Two perspectives of such models shall be applied here. On the one hand, those that make it possible to capture the fluidity or rigidity of societies. And, on the other hand, those that compare the distances and boundaries between classes and their effects on reproduction and mobility between classes.

The fluidity or rigidity of societies shall be measured by contrasting the social mobility between social origin and class of destination experienced by the generations in the sample. To do this, two hypotheses are used: one that supports constant fluidity and another that supports an increase in fluidity. In an open society, there will be greater possibilities for social mobility (more fluidity), while in a society where there is a large amount of social reproduction, and class origins (parents) have a major influence on children's destinations, there will be a greater predominance of social rigidity (fewer movements and high inheritance). Hence, the odds ratios would indicate independence, non-association or non-influence of origin when their value is 1, any increase on 1, or any decrease (between 1 and 0) would indicate association. Carabaña (1999) calls this kind of mobility "doubly relative" as it is based on a measure that takes into account a dual relationship: a child who is

in a category that comes from a certain class, in relation to another child that comes from a certain class that is taken as a reference.

The hypothesis of a society with stable mobility and stable reproduction is, as mentioned earlier, known as a constant social fluidity model (CnSF). In their details, relative mobility rates between origins and destinations remain constant across different cohorts. It is a homogeneous association model, with no interaction between the three variables, which implies that the relationship between origin and destination remains constant for each cohort or country in our case (Fachelli and López-Roldán 2015).

Another statistical model that is very widely used to compare between countries and work out how a pattern of association works is the Log-Multiplicative Layer Effect Model, better known as the “Unidiff” model (Erikson and Goldthorpe 1992; Xie 1992). This model constrains the variation between two or more mobility tables, for example, based on cohorts or sex, a pattern of common association and a changing term between the said tables. This parameter identifies the variations in the overall intensity of the association between class origins and destinations. The Unidiff model is useful for identifying the contexts in which there is greater or lesser social fluidity, given a previously specified fixed pattern of association (Solís and Boado 2016).

7.3.3.3 Relative Mobility: Distances Between Social Classes

We shall apply a set of models that have major discriminatory power to measure the distance between social classes, and which are more suited to comparative mobility research (Ganzeboom et al. 1991). These are known as statistical association, or Row-Column models, as presented by Goodman (1979), more specifically known as “RCII models”, developed after the Row-or-Column models (which were the first of the kind).

These are log-multiplicative models that measure the association between class of origin and class of destination, empirically estimating a ranking for the two (according to the association between them), thus generating a single parameter to measure the association between them. According to Torche and Wormald (2004) this procedure “reorders” the classes by estimating the distance between them and presenting a coefficient that measures the association between them. So, according to the aforesaid authors, there is no assumption a priori that the classes are ordered against one another, but that the order results from the empirical information about their association. For example, the less mobility there is between two classes, the more distant they are from each other in the ranking. They are also parsimonious models because they use a single parameter to express the association between social classes of origin and destination once ordered, so the results are easily interpretable. The RCII model serves as an empirical test of the ranking of classes, as it can be used to compare the empirically obtained ranking with rankings based on other criteria (income, education, etc.). So, to analyse whether the origin-destination association has changed between countries, the parameter that measures the

association is allowed to vary freely between them, while the ranking of classes is assumed to be constant across the different countries. This makes it possible to assess whether the association remains constant, increases or decreases between countries.

RCII analysis can also be used to separate analyses of the cells of a transition matrix into those that are mobile and those that reproduce class, thereby obtaining association parameters for the cells that exchange individuals and association parameters for inheritance itself (measuring the effect of the diagonal). According to Torche and Wormald (2004) mobility studies have revealed a disproportionate tendency for people to remain in the class of origin (a phenomenon known as “class inheritance”) so it is useful to control for this by adding specific parameters for the main diagonal, which model the tendency to inheritance in each class. Otherwise, the discovered association may be completely due to class inheritance.

It seems appropriate to calculate the RCII for two purposes. On the one hand, to apply it to each country, in order to observe the distances between classes and draw conclusions at the country level; and, on the other hand, in the comparative context between countries, in order to observe the distances between classes, considering a level of scale that will allow us to observe how difficult it is to reach the highest class when coming from the lowest level, taking into account all the countries that appear in the analysis.

The model we use to analyse the distance between classes in each country (which we could call intra-country inequality) only uses two variables and analyses the intensity of the origin-destination association as fixed individually for each country and that is expressed in as many intrinsic association parameters (Φ , Φ) as there are countries, using a log-multiplicative procedure. To make the model parsimonious, the same scores are kept for parents and children ($i = j$), and the main diagonal is blocked (to reproduce inheritance exactly for each social class). The algebraic formula is presented below, where O = class of origin, D = class of destination, Φ (Φ) is the intensity of association, u and v are the scores for parent and child constrained to one dimension and δ (δ) is the main diagonal.⁵

$$\log F_{ijk} = \lambda_0 + \lambda_i^O + \lambda_j^D + \Phi(u_i v_j) + \delta_{ij}^{OD}$$

The model that we use to observe the differences between countries (which we can call inter-country inequality) analyses the intensity of the origin-destination association that is expressed in as many Φ (Φ) parameters as there are countries, using a simple heterogeneous log-multiplicative procedure that maintains the same scores between parents and children ($i = j$) for all countries except for the diagonal; i.e. the level of inheritance per country is allowed to vary (the main diagonal is blocked to exactly reproduce the inheritance for each social class). The algebraic formula is presented below, being O = class of origin, D = class of destination,

⁵The intra-country model in the soft LEM is:

mod {O,D,ass2(O,D,6b),spe(OD,5a)}

P = Country, Phi (Φ) is the intensity of the association, u and v are the scores for parent and child constrained to one dimension for each country and delta (δ) is the main diagonal also by country in comparative terms.⁶

$$\log F_{ijk} = \lambda_0 + \lambda_i^O + \lambda_j^D + \lambda_k^P + \lambda_{ik}^{PO} + \lambda_{jk}^{PD} + \Phi_p (u_i v_j) + \delta_{ij}^{OD}$$

Using this later model, we shall observe class inheritance comparatively by analysing the scores provided by the diagonal.

7.4 Results

7.4.1 Absolute Mobility

First, we will analyse the change in socio-occupational structure observed between parents and children in each of the countries by considering the seven classes defined in this study. We shall then analyse the upward and downward vertical social mobility in order to make an analysis of the subsets of countries and their main recent trends.

Structural change is a contrast between the proportions of the class statuses of the interviewees (children) and the statuses of their classes of origin (parent). First, in Fig. 7.1, we note that the changes were more similar in European countries, and were more disparate in Latin America. Then we observe a general increase in service classes in both continents, although it is bigger in Europe than in Latin America. Then there is the downward trend in agricultural classes due to the transformation of rural activities. In Latin America, Brazil experienced a particularly marked shift over a short period of time in the number of day labourers who migrated from the countryside to the city, an issue studied in detail by Costa Ribeiro (2012, 2014). This contrasts with several European countries in which the biggest change was instead in the decrease in skilled manual workers and also in those with lower grade skills. And finally, it can be seen that there is a decrease in smallholders in all countries except Brazil, while there are barely any changes to the petite bourgeoisie (IVab), the biggest being the increase for children with respect to parents in Brazil.

Another form of global and comparative analysis is to consider absolute mobility in terms of vertical mobility, examining the increases and decreases. We group the seven classes from the original EGP scheme into four macro-classes: the first only considers the service class (I + II), the second consists of the routine non-manual class up to skilled and semi-skilled manual employees (IIIa+b, IVa + b y V + VI),

⁶The inter-country model used in the soft LEM is:
mod {PO,PD,ass2(O,D,P,6b),spe(OD,5a,P,c)}

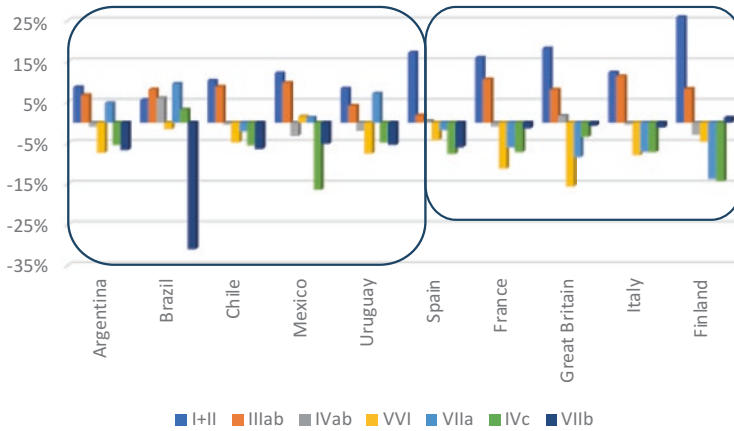


Fig. 7.1 Structural change between parents and children. Source: The authors

the third includes only non-agricultural lower grade manual workers (VIIa) and the fourth contains the agricultural classes (IVc and VIIb).⁷

We first note the greater presence of reproduction or immobility among males in Latin American countries than in Europe. In turn, there is a predominance of vertical upward mobility in the latter, as opposed to reproduction or downward mobility. Meanwhile, two trends are observed in Latin American countries: those where reproduction is more widespread than upward mobility (Chile, Argentina and Uruguay), and those where upward mobility is the main feature (Brazil and Mexico).

A remarkable characteristic is the mix between European and Latin American countries when ordered by upward mobility (Fig. 7.2). Reflecting this pattern, there are not many differences between absolute rates, except for those mentioned earlier for Uruguay, Argentina and Chile, while Finland is at the opposite extreme (high mobility and less inheritance than in the other countries) in the case of males.

However, the pattern for women in Latin America and Europe is different. Vertical upward mobility is greater than reproduction in all Latin American countries except Uruguay. Immobility and upward mobility have similar values, except in Great Britain where immobility affects a significant percentage of women.

7.4.2 *Relative Mobility: Rigidity and Fluidity*

Analysis of relative mobility, as mentioned earlier, reports possible changes between origin and destination when we isolate the effect of marginals, i.e. when changes in absolute mobility are not considered. We want to work out the extent to which the

⁷For a vertical mobility, international comparison can be measured in 3 classes: I + II, III to VI and VIIa + VIIb. We present this classification in Appendix 7.2.

Fig. 7.2 Vertical Mobility.
Source: The authors



opportunities for children to attain a certain position are conditioned by their parental origin, and whether this pattern of behaviour varies or not over time, and also between countries, and also to find out which countries have the greatest degree of social fluidity and which are more rigid.

Table 7.3 presents the results of applying the constant fluidity and Unidiff models to compare and contrast all the studied countries. Argentina is taken as the baseline for application of the Unidiff model. First, constant or common fluidity is preferable to Unidiff in the case of males (higher negative BIC value). However, the L^2 values, both for men and women, show that there are significant differences,⁸ so we choose the Unidiff model and thereby interpret the differences obtained.⁹

The results show that European countries are more fluid than Argentina (the country taken as our reference) and than Latin American countries in general. This trend is particularly noticeable among females, as clearly shown in Table 7.3 and Fig. 7.3.

Brazil is an exception among Latin American countries, especially as a result of its massive de-ruralisation. Uruguay is somewhat more fluid than Argentina in terms

⁸The standard errors show that each of the Unidiff values is significant. Available from the authors on request.

⁹It is worth noting that, given the size of the dataset, it is plausible to expect the convergence of Chi-square likelihood ration to be low, which is why numerous coefficients are applied.

Table 7.3 Trends in social fluidity. Origin-destination by country

OD by country (Trends in social fluidity)		L ²	d.f.	Sig.	BIC	D.I.	L ² diff	d.f. diff	Sig.	
<i>Three way</i>										
Women (<i>n</i> = 27,567)										
Comon [OC] [DC] [OD]	942.53	324	0.000	-2370.15	5.87					
Unidiff	870.15	315	0.000	-2350.51	5.71	72.38	9	0.000		
Country	Argentina	Brazil	Chile	Mexico	Uruguay	Spain	France	G.Britain	Italy	Finland
Unidiff Parameters [OD-C]	1.000	0.8994	1.0434	0.9398	0.9837	0.9075	0.7914	0.5976	0.695	0.6689
<i>Three way</i>										
Men (<i>n</i> = 34,538)										
Comon [OC] [DC] [OD]	1001.98	324	0.000	-2383.72	5.68					
Unidiff	896.98	315	0.000	-2394.68	5.4	105	9	0.000		
Country	Argentina	Brazil	Chile	Mexico	Uruguay	Spain	France	G.Britain	Italy	Finland
Unidiff Parameters [OD-C]	1.000	0.8750	1.0773	1.0667	0.9311	0.9223	0.8156	0.7911	0.7618	0.7343
<i>Three way</i>										
Men and Women (<i>n</i> = 62,105)										
Comon [OC] [DC] [OD]	1364.84	324	0.000	-2211.02	4.96					
Unidiff	1171.43	315	0.000	-2305.1	4.65	193.41	9	0.000		
Country	Argentina	Brazil	Chile	Mexico	Uruguay	Spain	France	G.Britain	Italy	Finland
Unidiff Parameters [OD-C]	1.000	0.8648	1.0358	1.0289	0.9137	0.8944	0.7857	0.7021	0.7121	0.6844

Source: The authors

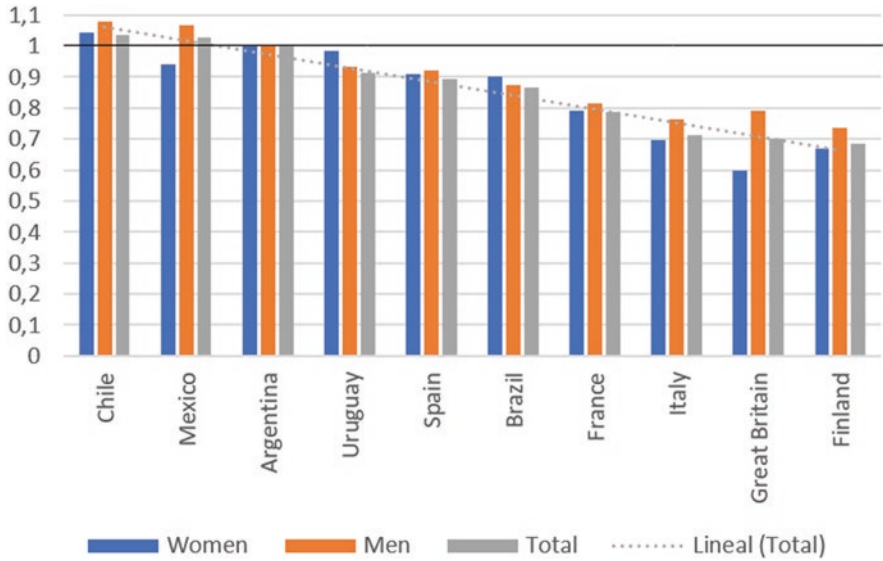


Fig. 7.3 Social fluidity. Unidiff values by country. Source: The authors

of men and women. Chile is not fluid for either sex, and Mexico is more so among women than among men.

Meanwhile, European countries have greater fluidity, and clearly more so among women, an aspect that is particularly prominent in Great Britain and Finland.

7.4.3 Social Distances

7.4.3.1 Relative Mobility: Distances Between Intra-Country RCII Classes

To capture in detail what lies behind the volume of change, the Row-Column (RCII) models can first be used to look at each country. Figure 7.4 shows that all countries experienced mobility processes (size and sign of the bars) and changes in the intensity of the association (size of the Phi shown beneath the horizontal axis).

Hence, the distances between classes in terms of RCII score are indicative of how frequent relative mobility is between them. These RCII model scores can be used to compare hierarchical order between social classes in each country.

In the Fig. 7.4, that distance is represented by the gap between the vertical bars that separate each of the classes, so when two classes appear very close to each other, this tells us that there is greater social fluidity between them, while a wider gap tells us that there is less fluidity, so we can assume there to be a greater social distance (Solís and Boado 2016).

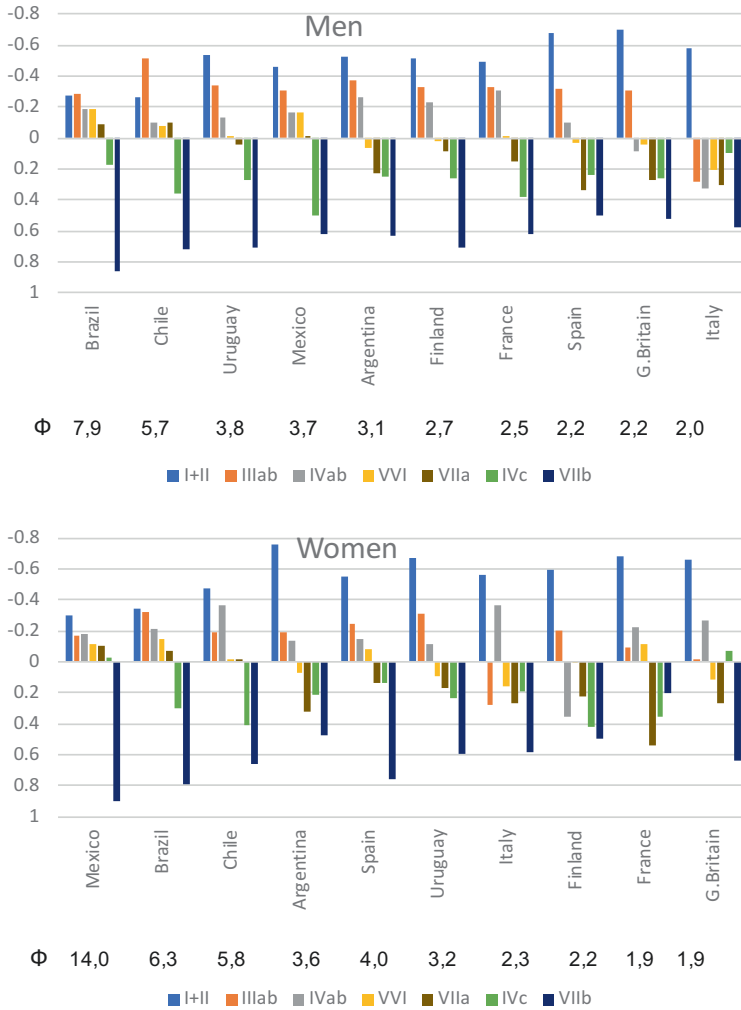


Fig. 7.4 Distance between intra-country classes (scores). Source: The authors

The obtained results show that all the analysed countries share the same hierarchical order in their class structure. In this order, the agricultural classes are at one extreme and the service and non-routine manual classes are at the other, and the existence of variations between countries in terms of hierarchical distances is observed as in Solís and Boado (2016).

In Latin American countries, there is eloquent polarisation of classes among men, whereby social extremes are more distant, and intermediate social classes are closer together. However, the association coefficients reveal Brazil and Chile to be more unequal than the other countries, while in Argentina, Mexico and Uruguay the

extremes are less pronounced. The same characteristics are observed for Argentinian and Uruguayan women. This is not the case for other countries, where the distances are smaller or larger, indicating less verticality and hierarchical sequence.

In Europe the distances between the extreme classes are certainly also wide, but less so in the cases of men in France and Finland. Spain has the highest Phi coefficient. The class difference between women is similar to that for men, but they have greater coefficients of association than males in Spain and Italy and smaller ones in France, Great Britain and Finland. Note that the female smallholders in Great Britain have a different pattern of association to women in other European countries.

It is important to note that Latin American countries have a higher value than European ones for the Phi parameter, i.e. the general association between classes. This expresses greater differences in the proportions of inequality in the former. These differences will be taken into account as we scale classes in consideration of all countries at the same time in the following section.

7.4.3.2 Distances Between Inter-Country RCII Classes

By taking the parameters of association and observing the inter-class differences between countries, we now take a comparative look at our results (Fig. 7.5).

First, we note that the hierarchical order between social classes spatially represents an order that we commonly use for classification, and which justifies why researchers frequently ‘downgrade’ class IVc, whereby smallholders are allocated a status associated with the lower classes (VIIb and VIIa).

RCII model scores transformed into log-odd ratios show that the hierarchical order expresses four areas of proximity between classes: the highest two are very close, there is a certain distance between the intermediate ones but they are more or less together, IVc is somewhat isolated from the means and VIIb, which is the one taken as a reference.

In all the societies analysed, day labourers that are the children of day labourers are the ones that face the biggest barriers (or those that have to cover the most distance) if they want to achieve the position of children in the service classes that come from parents of the same class. But these distances are also big for smallholders.

Another clear aspect is that the RCII scores, by including each society’s association coefficients (Φ) in comparative terms, show us that relative mobility between classes is much more frequent in European countries than in Latin American ones. And they particularly reveal that in societies such as Brazil, Chile and Argentina, mobility barriers are high for both men and women.

In the case of European women, the situation is similar to that of men except in the case of Great Britain where the greatest inequality is expressed among men and not so much among women, who face fewer barriers and where the classes are closer to each other. Also note that Spanish women face major barriers between classes, which is more similar to Latin American behaviour than European.

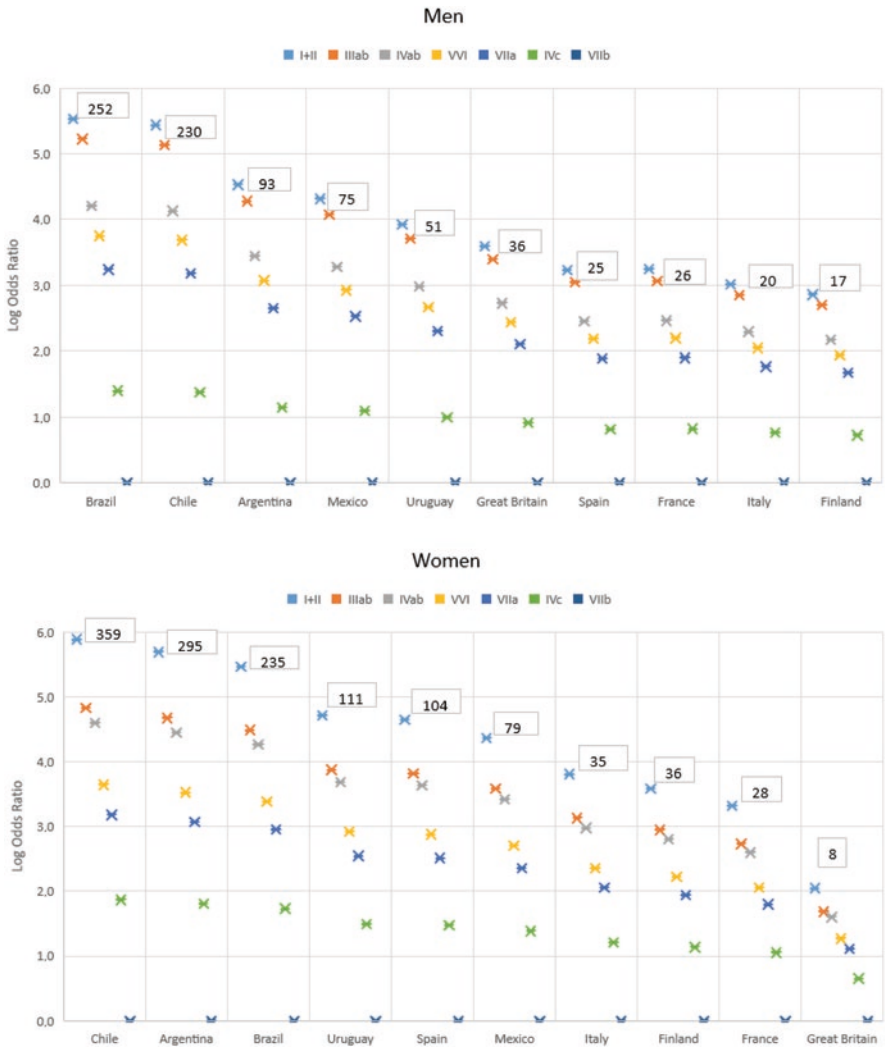


Fig. 7.5 Distance between inter-country classes. Access by day labourers to the other classes. Note: The values in boxes are the Odds Ratios of attaining classes I + II (The odds ratio graph is shown in the Appendix). Source: The authors

7.4.3.3 Distances Between RCII Classes: Inheritance

On the other hand, we propose analysis of such a relevant aspect as inheritance, in order to show which classes are the most and least reproductive. Since RCII models can be used to analyse the main diagonal separately (i.e. to reproduce the inheritance exactly for each social class), we now present an analysis of the scores obtained for the diagonal of all classes and all countries, comparatively valued.

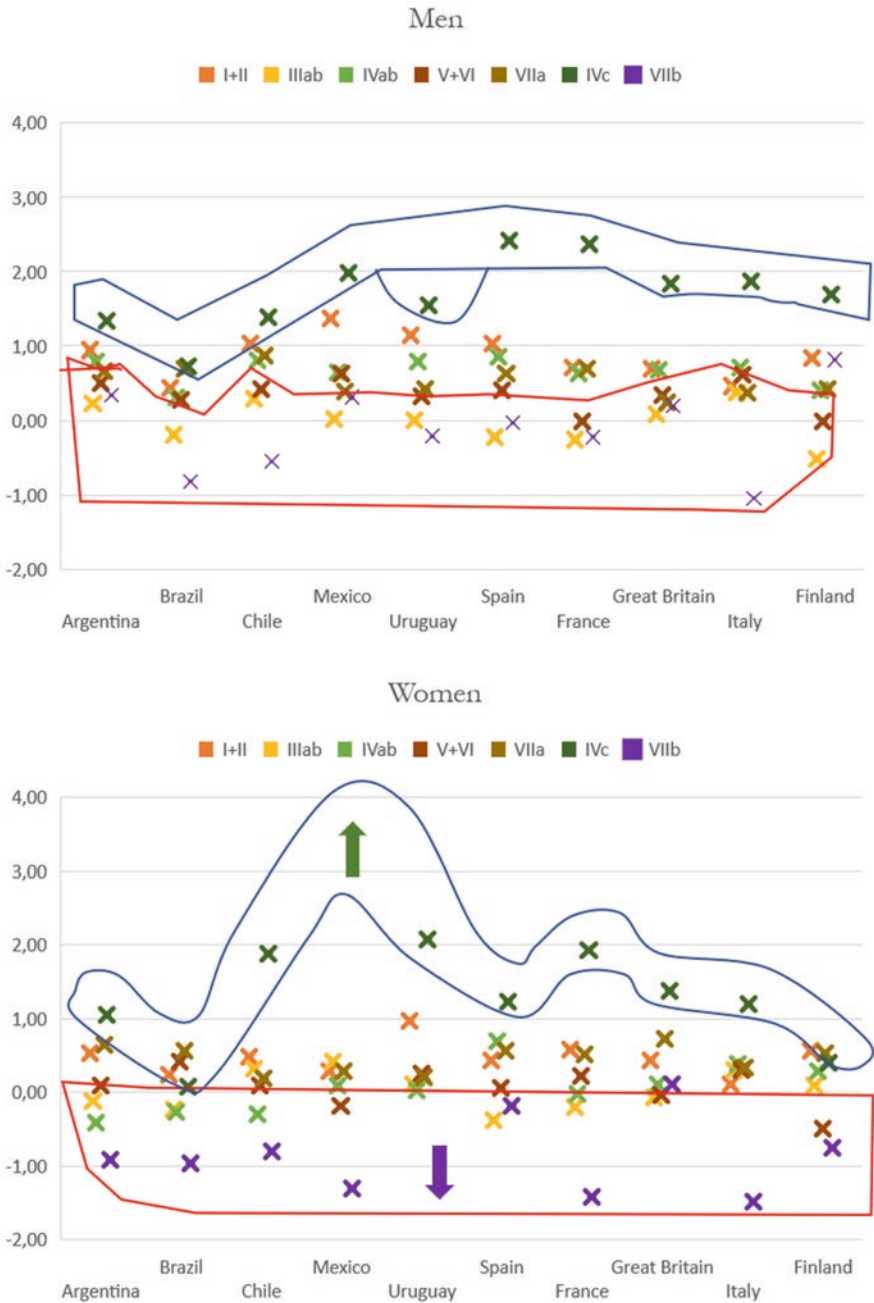


Fig. 7.6 Propensity of reproduction within each class, taking into account the distance between inter-country classes. Source: The authors

The following graphs show the propensity to reproduce between classes (Fig. 7.6). Zero is the boundary between the classes that reproduce the most (highest positive values) and the least (which have negative values).

First, we observe major regularity between countries, because the class that is most widely reproduced, i.e. is most intergenerational, is IVc in all countries in the case of men. Meanwhile, the classes with the lowest chance of reproduction are VIIb and IIIab in all countries.

We should particularly highlight that although Brazil was more fluid when the diagonal was not blocked (in relative mobility), when observing here the effects of reproduction by class (diagonal by class), IVc is the least rigid in comparison with the other countries. We also note that together with Italy, it has more mobile VIIb classes than in other countries.

In the case of women, class IVc is also the most reproductive (and extremely so in Mexico). However, this is less the case for Brazilian and Finnish women, due to different circumstances, and they are exceeded in terms of reproduction by other classes, namely VIIa, V + VI and I + II in Brazil and I + II and VIIa in Finland, which are practically at the same level as IVc. For its part, the least reproductive class is VIIb in all countries (and particularly so in Uruguay).

These results reflect how it is from agricultural areas (day labourers in particular) that much of the mobility has come in Latin America and in Europe, especially if there is a lack of assets or means to develop farms. Meanwhile, among urban classes the propensity for social reproduction is more equidistant among other classes, although the service, small business owner and skilled worker classes are still observed to be preponderant.

7.5 Summary and Conclusions

The general purpose of this chapter has been to make a contribution to the comparative analysis of social inequalities based on an analysis of intergenerational social mobility among the countries of the INCASI network.

We use the classical analysis methodology for such studies by addressing absolute mobility and relative mobility, investigating social fluidity and rigidity and using models to measure the distance between social classes and that are most suitable for comparative research.

We use data that has been approved previously by Latin American researchers and did likewise with European sources, trying to make the interpretation of the different surveys as comparable as possible.

The results obtained are summarised below, after which the section ends with a discussion of their implications for the analysis of inequality.

With respect to the analyses of absolute mobility, we have been able to show that structural change has been very important both in Latin American and European countries. We note greater similarity in class movements in Europe while in Latin

America these changes are more abrupt. The sharp decline in agricultural classes in these countries together with a sharp decline in industrial classes in Europe showcase two different stages of the industrialisation process, as observed by Ishida and Miwa, which can be summarised as high rates of de-ruralisation, these being greater among day labourers in late industrialised countries and a more pronounced process of deindustrialisation in European countries. The growth in service classes shows how pronounced this post-industrial stage is in Europe, but this process is also visible in all Latin American countries, albeit less pronounced and with more nuances than in Europe.

When analysing absolute social mobility in a more compact manner by converting the seven EGP classes into four macro-classes, we observe the importance of immobility, a relevant issue in this field of study as its volume is indicative of the strength or inertia of social reproduction. More than 40% of the people in the group of countries analysed are in this situation, with there being just over one percentage point more in Latin American countries than in Europe.

This factor is less important if a labourer's child is a labourer or if the child of a day worker is a day worker. The situation becomes more important when considering the aspects of social inequality that this entails, i.e. high reproduction rates in proprietary and service classes, for as the sociological literature has extensively demonstrated the inheritance of property, knowledge, client portfolios, social networks and opportunities of all kinds are an important factor for the perpetuation of inequality processes and the generation of conditions at institutional or meso-social levels that generate path-dependent effects that are difficult to reverse. So, the closing off of classes creates an additional obstacle for movement by other classes towards the higher levels.

However, by lowering this global 40% immobility to each of the countries, we have found that it is men in Uruguay, Chile and Argentina who have the highest levels of reproduction. Meanwhile, it is women who have experienced the greatest upward mobility (43.6%). Finally, the level of global downward mobility is around 17%.

Leaving aside structure, the marginals in the table, to start assessing relative mobility, we observe that European countries are more fluid and Latin American countries are more rigid, except Brazil, as commented earlier given that class IVc is the least reproductive compared with the other countries. In turn, Chile, Mexico and Argentina stand out as the most rigid when compared to the rest and France, Italy, Great Britain and Finland are the most fluid. The fluidity of these countries is driven to a greater extent by women.

When studying the differences between classes within each country, but not comparatively, we observe a shared hierarchical order, with the agricultural classes at one extreme and the service classes at the other, which shows the polarisation between classes as well as various intermediate situations depending on the particularities of each country. The Phi coefficients for each country show that men in Brazil and Chile, as well as women in Mexico and Chile, have the greatest relative

inequalities. On the other hand, men from Italy, Spain and Great Britain and women from France, Great Britain and Finland have the fewest differences.

To put all the countries in relation to each other, we apply a model to analyse them as a whole and obtain comparative relative inequality measures between classes and between countries. We thereby observe that relative mobility between classes is much less frequent in Latin American countries than in European countries. And we could especially observe that mobility barriers are very high in Brazil, Chile and Argentina, for men and even more so for women, compared to the other countries.

Finally, by analysing class inheritance separately, we were able to corroborate a uniform pattern of behaviour in all countries, observing that the smallholder class is the most reproductive, and that this is the case in all countries analysed. For its part, the class that contributes the least to reproduction is the lowest, that of agricultural labourers.

Before going back to our hypothesis, we would like to focus in on the importance and interest of the analysis of social mobility for the study of social inequality. We could ask what relevant information we can get out of social mobility analysis to serve the purposes set out for the INCASI project, i.e. to address the issue of social inequality. The answer is quite a lot. Analysis of social mobility allows us to briefly analyse inequality between social positions, by classifying people into different classes that are approximated by different socio-occupational groups (basically through studies of absolute mobility), and by analysing the inequality of access to these social positions (which we do through studies of relative mobility), which in themselves are already unequal. What truly matters here is that both approaches allow us to observe something 'invisible', namely social inequalities (distances) between social classes. We are getting to the heart of sociological analysis by analysing social stratification.

Our hypothesis, as mentioned earlier, was based on a classical idea drawn from the comparative literature on social mobility, which Ishida and Miwa (2011) put to the test by including countries that are not usually analysed in such studies: those of late industrialization. The authors proposed that there is a relationship between social inequality and the distribution of opportunities, and that this is grounded on the fact that societies that joined the industrialization process late generated greater social inequalities and also more disparate concentrations of opportunities for social promotion, which is expressed as less social openness.

In this study, we believe that we have provided evidence in that regard, using the three types of countries analysed by the aforesaid authors, namely Great Britain and France, which can be classed as early industrialised, those of late-late industrialisation that we might find in Latin American, and finally intermediate early-late industrialisation countries that might include Spain, Italy and Finland.

Based on the analyses of social fluidity that account for the degree of social openness on the one hand and, taking into account the analyses with RCII models that provide information about inequality between classes and between countries on the other, we can only corroborate the authors' hypothesis that "the later and faster

industrial development is, the higher the inequality and the lower the social fluidity” (Ishida and Miwa 2011: 9–10).

7.6 Discussion

We now present a discussion both of the contributions that we consider this study to make to social mobility, and of its limitations, as well as making some suggestions for the INCASI network’s future research programme.

The study that we have presented in this chapter can be set in the context of the tradition of so-called fourth Generation social mobility studies, which are, according to Treiman and Ganzeboom (2000), those that were made in comparative terms, such as those that addressed the issues of education (Shavit and Blossfeld), the transition from school to work (Shavit and Müller), the achievement of status (Ganzeboom and Treiman), class structure and class awareness (Wright), economic attitudes (Kelly) and the study of social stratification in Eastern Europe (Szelenyi and Treiman). We could add to this brief summary the ground-breaking contribution made by Ishida and Miwa that included late industrialised countries to traditional analyses of European countries and, above all, the United States.

In turn, this chapter also covers the tradition of, and makes wide use of its contributions, third generation mobility studies, led by Erikson and Goldthorpe who proposed the use of discrete variables and introduced a major development to the relevant methodologies (loglinear analysis) by considering classes to be intrinsically discrete and not necessarily ordered hierarchically. This is also the generation that introduced the flexible models developed by Goodman, such as the RCII that we have used extensively.

Although we do not apply the methodology of second generation studies, we do include some of the more theoretical contributions highlighted by Ganzeboom et al. (1991) such as the studies by Blau and Duncan (1967) and all those that deal with the scales of occupational prestige (Treiman 1977), which primarily use continuous quantitative variables and provide evidence to support modernisation theory. Finally, the first Generation is represented by such pioneering studies as those by Glass (1954) and Sorokin (1959), which albeit more rudimentary, using only two or three class groups, raised concerns that continued to feature in the biggest research questions of subsequent generations, such as the interest in the extent to which countries differ in terms of their mobility patterns (Lipset and Zetterberg 1959), whether the highest mobility rates occur in industrialised societies and the interest in analysing the relationship between the degree of political stability and mobility (Fox and Miller 1965), and what mobility processes were like under socialist regimes (Connor 1979).

In a way, we are heirs of this broad tradition and our hypothesis is well in line with the concerns that were raised by the first generation of studies but that have been a common thread throughout all the generations. Greater and better quality data is now available, so it is time to re-examine those foundational concerns. This leads us on to the main limitations of this study.

The study has limitations in terms of its scope, as it only analyses the relationship between origin and destination, it is fairly descriptive in nature and does not look in depth at the substantive processes that explain the analysed changes. Such a profound analysis of each of the countries is beyond the scope of this version. A lot could be done to improve the comparability between surveys both in terms of sample size and standard definitions of classes. We have worked with the data that was standardised for Latin America by Solís and Boado and colleagues from each Latin American country who worked so painstakingly with their national surveys, which enabled us to propose a preliminary comparison between Latin America and Europe that is limited to INCASI countries. However, the differences to the findings by Solís and Boado (2016) need to be taken into account, such as those in terms of the historical periods analysed. For example, those authors used data from 11 countries analysed by Breen from the 1970s to 1990s, while our study considers five European countries. Likewise, the Latin American countries are not the same either, as those authors include Peru, a country that adds considerable fluidity to the group of countries analysed, but their comparisons do not include Uruguay, a country that does appear in our sample and for which a national sample has been produced for the first time. Finally, the methodology that we used is also improvable and expandable. There are several other models that could be applied but that we have not presented in this chapter. Our findings should be taken as a starting point for the comparative research project that we intend to conduct in the future, and which shall begin with review, improvement and extension of these findings.

We therefore proceed with some proposals for the network's future comparative research project. Briefly, we propose two aspects, one methodological and the other substantive. In terms of methodology, the first step would involve looking further into the effect of education on social mobility by including one more variable. The goal is modest but the methodological development is new and innovative, and could be deemed the fifth Generation of mobility studies following the work by Breen (2010) using counterfactual models applied to the breakdown of the OED (origin, education and destination) triangle. These models require large, good quality samples, and very recent efforts have been made to produce just that in the case of Latin America. Second, in theoretical terms we need to address institutional issues, which are extremely relevant for comparative studies, enter into such pending debates as substantive issues related to unequal conditions and results, and also incorporate as many aspects as possible of the Analytical Model on Social Inequalities and Trajectories (AMOSIT) proposed by the INCASI project in order to relate not only macro-social aspects but the whole spectrum of elements that condition situations of inequality. Although we are aware that this is highly ambitious, and also very demanding in terms of data, we are convinced that this is the direction that we need to move in.

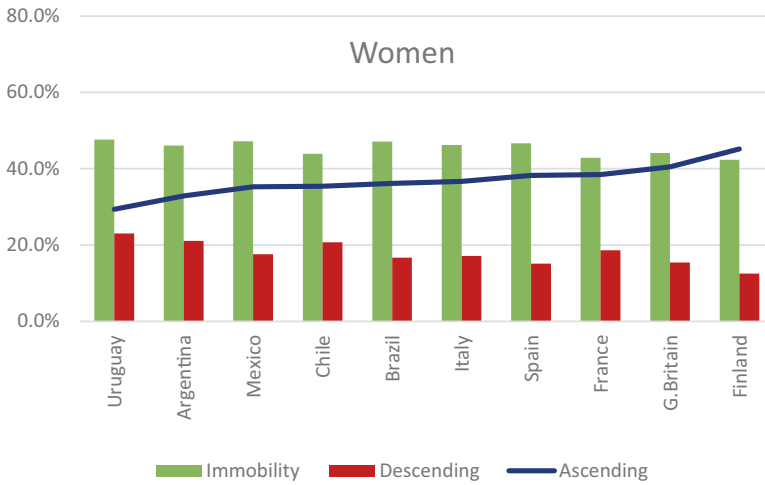
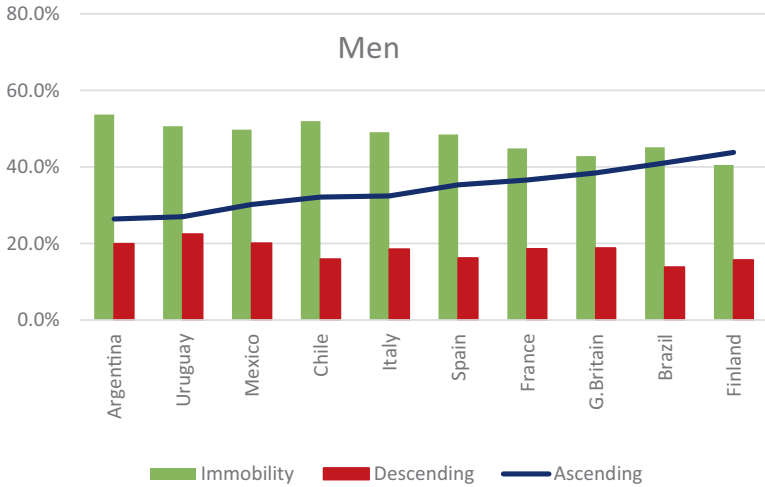
Appendix 7.1 Characteristics of the Sample Used and Employment Rates Per Country and Year

Countries	Argentina	Brazil	Chile	Mexico	Uruguay	Spain	France	Great Britain	Finland	Italy
Reference years	2003–2010– 2011	2008	2009	2011	2012–2013	2008–2010 2012–2014	2008–2010 2012–2014	2008–2010 2012–2014	2008–2010 2012–2014	2011
Survey name	(Various names)	Pesquisa Dimensões Sociais das Desigualdades	Encuesta Nacional de Estratificación Social	Encuesta de Movilidad Social en México	Encuesta Longitudinal de Protección Social (primera ola)	European Social Survey	European Social Survey	European Social Survey	European Social Survey	Indagine sul reddito e le condizioni di vita
Coverage	The whole country	The whole country	The whole country	The whole country	The whole country	The whole country	The whole country	The whole country	The whole country	The whole country
Target population	Employed persons between 20 and 64 years old	Heads of household and employed spouses between 20 and 64 years old	Employed persons between 20 and 64 years old	Employed persons between 25 and 64 years old	Employed persons between 25 and 64 years old	Economically active population between 25 and 64 years old	Economically active population between 25 and 64 years old	Economically active population between 25 and 64 years old	Economically active population between 25 and 64 years old	Economically active population between 25 and 64 years old
Type of survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey	Face-to-face household survey
Analytical sample size	5491	4744	2830	5670	7740	4393	4028	5138	4307	17,764

Countries	Argentina	Brazil	Chile	Mexico	Uruguay	Spain	France	Great Britain	Finland	Italy
Reference years	2003–2010–2011	2008	2009	2011	2012–2013	2008–2010 2012–2014	2008–2010 2012–2014	2008–2010 2012–2014	2008–2010 2012–2014	2011
Responsible institution	Centro de Estudios de Opinión Pública, Universidad de Buenos Aires	Instituto de Estudos Sociais e Políticos da Universidade do Estado do Rio de Janeiro	Proyecto Desigualdades (Anillos-CONICYT)	Centro de Estudios Espinosas Yglesias	Banco de Previsión Social	Universidad Pompeu Fabra	Cevipof (Science Po)	Center for Comparative Social Surveys	University of Turku	National Institute for Statistics (ISTAT)
Inputs for class construction (origins)	CUJO 88, Position, size, supervision	CUJO 88, Position, size, supervision	CUJO 88, Position, size, supervision	CUJO 88, Position, size, supervision /2	CUJO 88, occupational category	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision
Inputs for class construction (destinations)	CUJO 88, Position, size, supervision	CUJO 88, Position, size, supervision	CUJO 88, Position, size, supervision	CUJO 88, Position, size, supervision	CUJO 88, occupational category	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision	ISCO 88, Position, size, supervision
Occupancy rates according to each reference year (Source: OIT)										
Men first year	64.30	74.87	65.39	74.38	71.3	61.78	57.96	65.73	61.85	54.3
Women first year	41.20	50.81	38.88	40.64	51.95	43.89	47.3	53.12	53.55	34.73
Men second year	68.33				71.64	54.16	56.64	63.09	58.31	
Women second year	42.51				50.88	41.61	46.79	52.21	51.74	
Men third year	68.62					50.02	56.01	63.14	58.46	
Women third year	42.84					40.06	46.72	52.24	52.03	
Men fourth year						49.69	54.57	64.25	56.77	
Men fourth year						49.69	54.57	64.25	56.77	

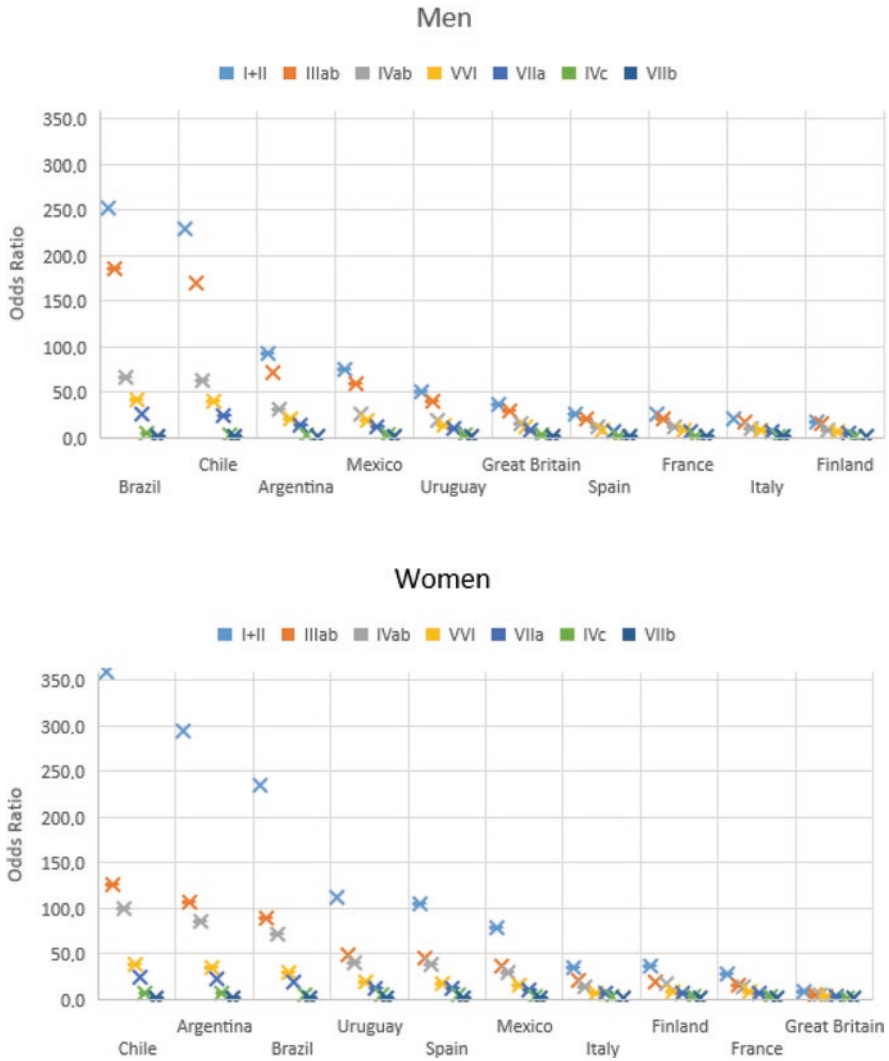
Source of samples: Latin America (Solís and Boado 2016), for Europe the authors

Appendix 7.2 Vertical Mobility in 3 Macro-Classes (I + II; III a VI and VIIa+VIIb)



Source: The authors

Appendix 7.3 Distance in Odds Ratio Between Inter-Country Classes. Access by Farm Labourers to Other Classes



Source: The authors

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Chapter 8

Migration and Social Mobility Between Argentina and Spain: Climbing the Social Hierarchy in the Transnational Space



Laura Oso and Pablo Dalle

Abstract This chapter analyses the relationship between migration and social mobility in Argentina and Spain from a transnational perspective focusing on two dimensions: the patterns of intergenerational social mobility of immigrants and natives in both countries; the social mobility strategies and trajectories of Galicians families in Buenos Aires and Argentinians, of Galician origin, who migrated to Galicia after the 2001 crisis. The chapter begins by contextualizing the migratory trends in Europe and Latin America. This is followed by a comparative study of how immigration impacts on the class structure and social mobility patterns in Argentina and Spain. Quantitative analysis techniques are used to study the intergenerational social mobility rates. The statistical analysis of stratification and social mobility surveys have been benchmarked against previous studies conducted in Argentina (Germani, G., *Movilidad social en la sociedad industrial*. EUDEBA, Buenos Aires, 1963; Dalle, P., *Movilidad social desde las clases populares. Un estudio sociológico en el Área Metropolitana de Buenos Aires (1960–2013)*. CLACSO/Instituto de Investigaciones Gino Germani-UBA/CICCUS, Buenos Aires, 2016) and Spain (Fachelli, S., & López-Roldán, P., *Revista Española de Sociología* 26:1–20, 2017). Secondly, qualitative research methods are used to consider the social mobility strategies and class trajectories of migrant families. We analyse two fieldworks, developed in the framework of other research projects (based on 44 biographical and semi-structured interviews). These case studies were carried out with Galicians that migrated to Argentina between 1940 and 1960 and Argentinians, of Galician origin, who migrated to Galicia after the 2001 crisis.

L. Oso (✉)

Equipo de Sociología de las Migraciones Internacionales, Universidade da Coruña,
A Coruña, Spain
e-mail: laura.oso@udc.es

P. Dalle

CONICET, Instituto de Investigaciones Gino Germani, Universidad de Buenos Aires,
Buenos Aires, Argentina

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8.1 Introduction

Migratory flows between Spain and Argentina are related to the economic development of both countries, set within the wider context of the migration patterns that have evolved between Europe and Latin America. Between the late nineteenth century and the mid-twentieth century, Spaniards emigrated to Argentina, with Galicians comprising the largest number of immigrants. However, the end of the twentieth century registered a change of direction, with Argentineans now travelling to Spain. Unequal conditions on both continents, and particularly between these two countries, in terms of economic growth, job opportunities and income levels, which together impact on social mobility “expectations”, have traditionally developed a transnational dynamic on both sides of the Atlantic. This route has witnessed the emergence of migratory flows in both directions that have built up strong social networks between the origin and host societies, laying the foundations for material and symbolic resources that have favoured the social mobility of families within the transnational space.

Our text aims to contribute to the debate on migration and social mobility by analysing migratory flows between Latin America and Europe, and specifically between Argentina and Spain. Our analysis is based on two academic traditions: studies into social stratification and mobility, and literature on international migration. We will now consider how these two traditions have addressed the connection between migration and social mobility.

8.2 The Migration-Social Mobility Connection: An Issue for Debate

Despite the considerable progress of social mobility studies within the field of Sociology, attributable to the application of sophisticated statistical techniques such as path analysis and especially the wide range of long-lineal analysis models (Cuin 1993; Hout and Di Prete 2006), very little work has been conducted into the relationship between social mobility and migration or spatial mobility.

From a quantitative approach, scientific production has focused particularly on the way migration impacts on the class structures of the host societies. Certain authors posit that immigration is associated with economic growth and development, thereby acting as an encouragement to upward social mobility. Although there is a clear lack of consensus as to whether migrants are drawn by more open societies or whether immigration leads to the opening up of the class structure, it is

assumed that international immigration has a positive effect on the openness of class structures (Yaish and Andersen 2012; Yaish 2002).

As for migrant generations and their social mobility patterns, a number of researchers have proposed a “succession model”: new arrivals are inserted at the base of the class structure, which has a “push effect” on the native population and earlier waves of migrants (Lipset and Bendix 1963; Germani 1963; Blau and Duncan 1967; Richmond 1988). Germani (1962) observed also a different effect: when faced with mass international migration, less consolidated social structures experience a “replacement effect” of the native society, leading to the creation of a new social structure and the upward structural mobility of the migrant population, like the first waves of immigrants from North Europe in the United States, the immigrants from South Europe (mainly Italy and Spain) in Argentina and Ashkenazi immigration to Israel.

Regarding migrants’ children, literature has traditionally followed the “linear assimilation” theory, whereby the upward social mobility of newly arrived ethnic groups is considered a question of time, and is dependent on their gradual inclusion of the cultural values held by the host middle classes (Park 1928; Warner and Srole 1945; Germani 1963 on Argentina). Later studies questioned this theory, associated with the “American dream”, highlighting the need to address ethnic as well as cultural considerations as the North American middle class is of European-white origin (Perlmann and Waldinger 1999; Perlman and Waldinger 1997). In a study carried out in the USA, Portes and Zhou (1993) criticised the “lineal assimilation” theory, opening a new line of analysis based on the “segmented assimilation” hypothesis. These authors identified three types social and cultural integration and class insertion trajectories among the migrant population: (1) the *mainstream assimilation*, which involves the incorporation of middle class standards and rules, favouring the long-distance upward mobility of the working classes; (2) the *strength of ethnic capital*: some groups conserve their identity through strong ties that, despite hostile contexts of discrimination and blocked access to opportunities, allow for short-distance upward mobility based on the economic activity of the endo-group; and; (3) *downward assimilation*: certain subordinate ethnic groups lose their cultural identity. The absence of dense social networks makes them more vulnerable to discrimination, and therefore their class trajectory is limited to intergenerational reproduction within the informal working class, and they are often trapped within a permanent circle of poverty that extends over various generations.

Turning to European literature, Thomson and Crul (2007) stress the importance of analysing the interrelation of four factors that intervene in the social mobility of the migrant population and their descendants: whether the opportunities structure is closed or open; the ethnic group’s culture, the density of their social relationships and their economic resources; family/personal agency; and the institutional context of the host society.

Recent studies have shown that although migrants tend to enter their new society on the lower rungs of the class ladder, their children will manage to position themselves on a par with the native population. Generally speaking, migrants procure intra-generational upward social mobility through the small-scale bourgeoisie in

niches of economic activity. However, they are blocked from access to the privileged middle classes that requires higher education qualification and the internalisation of the cultural capital of the middle classes hegemonic to the host society. However, migrants' children tend to equal—and on occasions even exceed—the native population in terms of their upward social mobility rates (Goldthorpe et al. 1997; Yaish 2002). As we have indicated, some authors consider that immigrants' children achieve longer distance social mobility in the light of their capacity to assume the hegemonic culture of their host society, a process that is less arduous in the case of ethnic groups that identify more closely with said culture (Portes and Zhou 1993; Portes and Rumbaut 2001).

As we have seen, most studies focus on either the impact of immigration on social structures, or the intra and inter-generational mobility trajectories of the migrant population and their descendants from the perspective of the host country. Nevertheless, in recent years, the transnational approach, addressed extensively in international migration literature, has required a vision that looks beyond traditional considerations when studying the connection between migration and social mobility. Indeed, and as discussed by Favell and Recchi (2011), international migratory flows have transformed the notion of social mobility that dominated scientific production until the late twentieth and early twenty first centuries, questioning the idea of social mobility as a closed system comprising static social classes, built within national borders. New analyses are required that seek to determine the impact of population flows on the social structure of countries, and that also consider the transnational dynamics that take place between the migrants' contexts of origin and destination in order to shed light on the connection between migration and social mobility.

The family biography, which highlights the resources that are mobilised and deployed between generations, provides an alternative approach to the quantitative research that has dominated social mobility literature, which is perhaps more suited to the analysis of social mobility dynamics in the transnational space. Yet it has received scant attention when addressing the problems arising from social mobility within migration (Bertaux and Thompson 1997; Portes and Rumbaut 2001; Dalle 2013, 2016; Oso and Suárez-Grimalt 2017; Oso et al. 2019; among others). Furthermore, research has generally failed to combine quantitative and qualitative studies that consider the connection between migration and social mobility (Portes and Rumbaut 2001; Favell and Recchi 2011; among others).

This chapter aims to contribute to this scholarly debate by addressing social mobility within the context of international migration from both a quantitative and qualitative approach, thereby moving beyond previous studies. Not only does it take an in-depth look at the impact of immigration on class structures within the host society, but also on the intergenerational social mobility rates of the immigrant population. One of the contributions of this chapter is that it also addresses this research question from a comparative perspective. It analyses the international class mobility patterns of the immigrant population in Spain and Argentina during the first decade of the twenty-first century, comparing them with those of the native population. Furthermore, it considers the key channels for upward social mobility of migrants

within each country and reflects on the impact immigration has on the general degree of fluidity within the Spanish and Argentinean class structures.

Furthermore, this chapter adopts a transnational approach to the analysis of migration and social mobility, looking beyond the host context. This requires the analysis of how class positions shift with comings and goings within the transnational space. In line with other research conducted by the authors, (Oso and Suárez-Grimalt 2017; Oso et al. 2019), it reveals the essential need to consider several major key factors, rather than limiting research to education and occupational trajectories of social mobilities: patrimonial, business, and marriage strategies, as well as investments in social, human and legal capital (Spanish nationality). Finally, the principal contribution of this chapter is the insight it provides into the transnational articulation of capital accumulation, shedding light on family social mobility strategies and trajectories from an intergenerational dimension. Indeed, our qualitative analysis reveals how various generations interconnect family social mobility strategies within the transnational space as a means of achieving their goals or tackling difficulties stemming from conditioning factors such as their initial social class and the social and historical context. The result is an intergenerational accumulation of various types of capital that are passed between families of migrant origin, namely economic capital, human capital, social capital of ethnic origin and legal capital (Spanish nationality). We will attempt to show how these types of capital are activated on both sides of the Atlantic in accordance with the opportunities available in each country over various periods, as well as a number of other factors.

After addressing the key methodological challenges, the text begins with an insight into migratory flows in Spain and Argentina, positioning them within their regional context (Europe and Latin America). This is followed by a quantitative analysis of the impact immigration has on the class structure in migrant host societies, including a comparison of Spain and Argentina. It analyses the intergenerational class mobility patterns of international migrants in each country, comparing them with those of the native population during the first decade of the twenty-first century. A qualitative approach is then taken to the social mobility strategies of migrant families in the transnational context, consisting of a comparison between migration from Galicia (historically one of the principal regions of origin of Spanish emigration) to Argentina during the last migratory flow (1040–1960) and Argentinean emigration to Galicia by their descendants in the wake of the 2001 crisis.¹ This sheds light on the highly specific nature of Galician immigration, comparing it with the social reality of immigrants from other geographical contexts.

¹The qualitative fieldwork with Galician migrants in Argentina was carried out within the framework of the following projects: Gender, transnationalism and intergenerational social mobility strategies (Oso 2011–2014); Gender, crossed mobilities and transnational dynamics (Oso 2015–2019). Financed by the Spanish Ministry of the Economy and Competitiveness (References: FEM2011–26110 and FEM2015–67164-R). Further funding was obtained from the Galician Autonomous Government (Xunta de Galicia) under the programme “Consolidation and Structuring of Competitive Research Units in the Galician University System” (GRC2014/048; Oso 2014–2017). The study into Argentinean migrants in Galicia was carried out within the Equal

8.3 Methodological Challenges: Data and Analysis Techniques

Our research involves a combination of quantitative and qualitative techniques: the exploitation of secondary statistical sources; the statistical analysis of surveys on stratification and social mobility, as well as biographical and semi-structured interviews with migrants of Galician origin that have moved between the Atlantic transnational space (return migrations between Galicia and Argentina).

In order to provide a regional context for the migratory processes occurring in Spain and Argentina, we used various databases. The 2018 Eurostat database on population born abroad was used to provide an insight into the immigrant population stock. In the case of Latin America, the data were obtained from the Latin American and Caribbean Demographic Centre (CELADE in its Spanish initials), the population division of the Economic Commission for Latin America and the Caribbean (ECLAC), which holds the censuses for the countries included in the region, known collectively as the Observatory for International Migration in Latin America (IMILA in its Spanish initials). In this case we analysed the data for the CIRCA 2010 censuses. We also considered UN estimates in order to obtain a more accurate comparison with European countries.

The Municipal Population Census (PMH in its Spanish initials), drawn up by the Spanish Statistics Agency (INE in its Spanish initials) was used to determine the social and demographic characteristics of Spain's immigrant population. This provided an insight into the scale, origin and sex of the population born abroad. The Labour Force Survey (EPA in its Spanish initials, published by INE) provided the data used to analyse the level of education and the principal employment sectors of the foreign population in Spain.² In the case of Argentina, the evolution of the major migratory flows, level of education and the principal areas of employment were analysed using data obtained from the 2010 census.

The analysis of intergenerational social mobility patterns is based on surveys that include retrospective indicators on family class when respondents were aged 16. For Argentina, a database was used comprising three integrated surveys: the 2007 Stratification and Social Mobility Survey conducted by the Gino Germani Institute of the University of Buenos Aires; the 2013 survey conducted by the Gino Germani Institute of the University of Buenos Aires, both directed by Dr. Raúl Jorrat (for the country as a whole), and the Social Structure National Survey of the National Research Programme on Contemporary Society (PISAC in its Spanish initials) (for urban totals). In the case of Spain, we followed the guidelines of the study

Convive Mais project (2005–2007), European Social Fund. FSE-EQUAL-2004 (Spanish Official Gazette [BOE] 29/03/2004).

²Unlike the Municipal Census Data, the Labour Force Survey does not provide a breakdown by country of birth (origin), but rather by nationality, thereby somewhat reducing the value of the naturalised immigrant (born abroad) classification.

conducted by Fachelli and López-Roldán (2017), based on the 2011 Living Conditions Survey conducted by the Spanish Statistics Agency (INE).

Our qualitative analysis is based on two previous case studies, carried out within the framework of other research projects.³ The first was part of the FEM2011–26110 and FEM2015–67164-R projects, and consisted of biographical interviews held with Galician migrants who arrived in Buenos Aires between 1940 and 1960 and their descendants (children and grandchildren). The sample also include a number of families that migrated towards the end of the first wave (1930 and 1937) in order to provide a point of contrast and transition. This fieldwork was carried out in the city of Buenos Aires and its conurbation in 2010, 2012, 2014 and 2018 (Oso et al. 2019). The initial contact was with key informants from Galician associations (Casa de Galicia, Asociación Mutualistas Residentes de Vigo, Federación de Sociedades Gallegas), which enabled us to get in touch with a number of interviewees, although personal connections were also used as a means of accessing families outside the circle of associations. In some cases, biographical interviews were held with just one family member (12), whilst in other cases (7 families), several members were interviewed (husbands/wives, fathers/mothers, sons/daughters and even grandmothers/grandfathers). Contact was made with 28 people over the course of our fieldwork: 16 women and 12 men. Twelve of the informants were migrants who arrived in Argentina between 1940 and 1960; thirteen were the children of migrants; and three were grandchildren. Migrant generation interviewees were of rural origin and had a low level of education, in contrast to the children and grandchildren, whose level of education ranged between medium and high.

The second fieldwork took place in Galicia between 2005 and 2006 with immigrants of varying origin, as part of the Equal Convive+ research project and consisted of 50 semi-structured interviews (20 men and 30 women). The majority of interviewees had successfully completed secondary and higher education. In terms of their labour activity, the majority were self-employed. Particularly worthy of note was the number of entrepreneurs from those countries with a long-standing tradition of Galician emigration, namely Argentina, Uruguay and Venezuela. Most of those in paid employment worked in the retail and catering sectors, or in domestic service and care work, although a number were also employed in the building industry. Sixteen of those included in the study (seven men and nine women) had migrated from Argentina. Most were the descendants of Galician emigrants who travelled to Spain following the 2001 crisis in Argentina. Of the remainder of interviewees, 14 had migrated from countries that, like Argentina, shared ties with Galician emigration (Venezuela and Uruguay). Twenty migrants came from other contexts (mainly from Colombia, Peru, Brazil, Morocco and Senegal). Our work focuses particularly on the data obtained from the 16 interviews with immigrants from Argentina, whilst establishing a comparison with the social reality of immigrants from other countries (Oso Casas et al. 2006).

³As already mentioned, the fieldwork with Galician migrants in Argentina was carried out within the framework of the following previous research projects (References: FEM2011–26110; FEM2015–67164-R; GRC2014/048; FSE-EQUAL-2004).

A final point for consideration is that our work follows a comparative approach based on four aspects:

1. A comparison between the social mobility patterns of Spanish immigrants in Argentina, specifically those of Galician origin, and their descendants (children and grandchildren), and those of immigrants from overseas and their descendants and later immigrants from bordering nations.
2. A comparative analysis of the impact of immigration on class structure in twenty-first century Argentina and Spain.
3. A study of the social mobility trajectories of Argentinean immigrants of Galician origin in Spain, compared with immigrants from other countries.
4. The social mobility of Galicians that emigrated to Argentina between 1940 and 1960 in comparison with the Galician descendants that migrated to Spain in the wake of the 2001 crisis.

After establishing the methodological approach, we will define the main migration trends in Spain and Argentina within their regional context.

8.4 Migrations in Spain and Argentina Within the Regional Context (Europe and Latin America): A Tale of Comings and Goings

Europe has traditionally been a continent of emigration. The colonial era was marked by the intense movement of individuals from Europe to the “New World”. In the nineteenth century, these migratory flows intensified. The transition towards market-based capitalist agriculture and developments in sea transport led large numbers of displaced agricultural workers in Europe to move to the United States, Canada and Latin America. Latin American countries, and Argentina in particular, held an irresistible appeal for overseas immigration in the wake of waning migratory flows from northern Europe, which was accompanied by a rise in the numbers of migrants travelling from southern Europe. Baily and Míguez (2003) estimate that around ten million people emigrated from Europe to Latin America between 1870 and 1930, three-quarters of whom were from the Iberian Peninsula (Spain and Portugal) and Italy. Of these, 91% travelled to just three countries: Argentina (50%), Brazil (36%) and Uruguay (5%). These migratory flows were related to earlier trends, as well as to the existence of social networks that originated during the colonial era.

In the case of Argentina, overseas immigration reached its height in the years between 1870 and 1930, despite being interrupted by World War I. Following World War II, immigration flows to Argentina were revitalised during a brief but intense period (approximately until 1958). This extended time span saw the arrival of around 7,600,000 immigrants, with an estimated residential rate of 56%. The principal

nationalities were Italians, Spaniards, Poles and Russians (including a considerable proportion of Jews), Germans, French, Britons and people from Arab nations (Devoto 2004). Within this migratory trend, around 65% of Spanish descendants in the city of Buenos Aires and Greater Buenos Aires were of Galician origin, forming the largest regional-ethnic group of overseas immigrants in Argentina (Pérez-Prado 2007).

The flood of immigrants brought substantial change to Argentina's social structure and a move away from a polarised and closed class system to another in which the middle classes gained influence, favouring the possibility of upward social mobility (Germani 1962).

History brought a sharp turnabout in the direction of migratory flows across the Atlantic. In the late twentieth century (1980s), Europe, and particularly those countries with a long-standing tradition of emigration to Latin America (Spain, Portugal and Italy), began to receive immigrants from the continent that had traditionally been the destination of their ancestors. During the 1960s and 1970s, northern European countries (the UK, France, Belgium, the Netherlands, Switzerland and Germany) had acted as the principal host countries for European immigration, essentially their southern European neighbours. However, during the following two decades (1980s and 1990s), Spain, Italy, Greece and Portugal emerged as host countries for immigrants, mainly attracting flows from outside Europe. Eurostat data for 2018 reveal how more than 10% of the Spanish, Italian and Greek population is of immigrant origin, percentages on a par with other countries with a far greater tradition of immigration in Europe, such as France and the Netherlands (Fig. 8.1).

Spain experienced a sharp hike in the number of incoming migrants from the late twentieth century onwards, a trend that was further heightened at the start of the twenty-first century, coinciding with a period of economic prosperity. This would

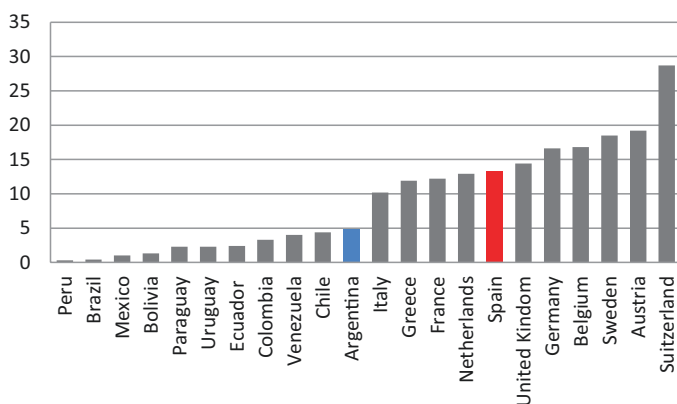


Fig. 8.1 Percentage of immigrant population in Latin America and European Countries (2017/2018). Source: ILO estimates for 2017 in Latin American countries and 2018 Eurostats data for Europe

continue until the financial crisis of 2008. The principal countries of origin of immigrants in Spain include Morocco (12.9%) and Rumania (9.3%), followed of some Latin American countries (Ecuador 6.3%. Colombia 6.2%. Argentina 4%. Venezuela 4% and Peru 3.2%) (2018 Municipal Population Census, Spanish Statistics Agency (INE in its Spanish initials).

Unlike the Spanish migrants that set sail for America during the first half of the twentieth century, many of whom were of rural origin and had a low level of education (illiteracy rates were high), the majority of immigrants to Spain of Latin American origin have an average-high level of education: 26% had completed the first stage of their secondary education; 24.4% the second stage and 24.2% had undertaken higher education (Working Population Survey-EPA in its Spanish initials] for the second quarter of 2019). However, despite their medium-high level of education, Latin American immigrants tend to be employed below their skills level, mainly in the catering, personal care, protection and retail sectors (28.6%), as well as in unskilled domestic service, farm labour, fishing, building, manufacturing and transformation industries (30.1%) (EPA for the second quarter of 2019).

From the mid-twentieth century onwards, the following migratory patterns emerged in Latin America: (1) in terms of immigration, a rise in interregional flows and a steady fall in total and relative number of overseas immigrants; and (2) extra-regional emigration to relatively more developed countries (the USA and Europe) (Pizarro and Rivera 2016).

Today, Argentina has the highest relative volume of immigrants in South America (4.9%) (ILO estimates for 2017). Since the late nineteenth century, Argentina received successive waves of regional migrants (in particular from its bordering countries) that comprised a relatively constant percentage of the country's population until 1990. From then on, the figures began to rise, attributable to the growing intensity of traditional flows from Paraguay (30.5%) and Bolivia (20.1%), and the emergence of new currents from Peru (9.4%), and more recently also from Colombia and Venezuela (2010 census). Both the Paraguayan and Bolivian groups generally have lower levels of education than the native population and their labour insertion tends to be in less formal areas of economic activity. On average, Peruvian immigrants have a higher level of education than the native population, yet they generally work in areas that require fewer skills. The main economic sectors that employ this regional immigration are construction, domestic service, provision of care for the elderly, fruit, vegetable and flower farming, construction, textile factories and the retail clothing and trade (Benencia 2016; Cerrutti 2018).

After providing a context for the migratory dynamics on either side of the Atlantic, the following section provides a detailed insight into the immigrant population in Spain and Argentina, taking into consideration their insertion in the class structure and their intergenerational class mobility patterns in relation to their family of origin.

8.5 Immigration and Social Mobility in Argentina and Spain

This section analyses the patterns of intergenerational social mobility among the immigrant and native populations of Argentina and Spain. It begins with a discussion of the patterns of insertion in the class stratification structure by the children of Spanish immigrants (who had arrived with the early immigrant flows) and of Spanish immigrants that arrived after the war in the Buenos Aires Metropolitan Areas in 1961. It then considers the class insertion of the Spanish ascendant population (children and grandchildren) today. This allows us to reconstruct the principal patterns of intergenerational social mobility among Spanish families in Buenos Aires. A final stage is to consider, within this perspective, the intergenerational social mobility patterns of immigrants and natives in Argentina and Spain, based on recent surveys. The aim is to determine the impact of immigration on the modern-day class structure of each country.

Between 1870 and 1930, Argentina became a major player in the global economy due to its meat and cereal exports. The expansion of livestock and farming activity and the manufacturing industry and associated service sector, turned the country into an attractive destination for large numbers of European workers who had been displaced following the shift to capitalist, market-oriented architecture. The flood of European immigration had a replacement effect on the relatively small native population. Overseas immigration was both a consequence and driving force for economic development. The social stratification profile underwent a radical transformation from a polarised and fairly closed society to one characterised by an emerging middle class that allowed for inter-class movement.

Growing employment opportunities led to an intense process of upward social mobility of a structural nature. European immigrants and their descendants were the first to generate or take advantage of these opportunities. For the immigrant generation, the road to intergenerational social ascent was dotted with small workshops, stores and agriculture and livestock farms that flourished within the context of a rising and relatively prosperous population. This was particularly true of the Pampas region, which was the driving force for economic growth. Yet the majority entered the emerging working class; for many the first rung on the ladder to upward mobility, away from rural activities. For their children, state education was a channel for social ascent, providing them with the necessary skills and knowledge to access technical or administrative jobs (intergenerational social mobility) (Germani 1962, 1963). European migrants and their descendants did not have to integrate into this society, as they were themselves responsible for its creation.

At the start of the second half of the twentieth century, Buenos Aires' metropolitan area (the city and conurbation of Buenos Aires) was characterised by its strong European social and cultural influence, the consequence of success migratory waves that arrived between 1870 and 1930 and 1945 and 1958. The 1961 survey conducted by Germani provides a panoramic vision of this influx 1961. Considering two generations, three quarters of the population were of European ascent (76%) and

Galician migration made a major contribution to the rising population. Practically a quarter of the population of Buenos Aires' metropolitan area was of Spanish origin (24%), and estimates from the studies referred to above indicate that some two thirds of this number (65%) were of Galician origin.

We will now examine the social mobility patterns of Spanish migrants, their children and grandchildren. The quantitative analysis based on Germani's survey reveals that by 1961 two thirds (66%) of the children of the Spanish immigrants that formed part of the early waves at the end of the nineteenth century and start of the twentieth century were members of the middle classes, with a considerable number forming part of the upper strata. In contrast, later arrivals were positioned in the working classes, and were mainly skilled employees or self-employed workers with a trade. However, a considerable proportion belonged to an adjacent stratum accessed mainly by setting up small food and beverage outlets (bars, bakeries and restaurants) (see Oso et al. 2019).

The typical intergenerational social mobility trajectory of the population of Galician origin in Buenos Aires involves two transitional phases. Firstly, the Galician migrants became labourers instead of farmworkers—the men were employed mainly in the service sector as restaurant waiters or kitchen assistants or milkmen, as well as in meat processing plants and other industries—, whilst the women were employed in domestic service or the textile industry. Secondly, following a period of settlement and consolidation, a considerable number of migrants experienced upward mobility, becoming small-scale retailers.

What is left of these trends in modern-day Buenos Aires? Using the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrot, we analysed the social mobility patterns of the children and grandchildren of Spanish migrants today. Regarding the children of Galician migrants from the post-war flows, we observed their insertion in the lower-middle classes, by either continuing with their parents' retail ventures or occupying technical or administrative posts. As with other groups of European origin, they enjoyed high rates of access to the upper-middle classes thanks to university qualifications, albeit at a slightly lower rate in comparison with the children of migrants from the first wave (between 1857 and 1936). This indicated that Galician families included in the more recent migratory trend (1940–1960) encountered a more consolidated and therefore possibly less accessible social structure, and therefore their upward social mobility trajectories were of a more modest nature. In turn, the grandchildren of Galician migrants form part of the management/professional class in a proportion on a par with other groups of European origin, thanks to their university qualifications. A considerable number originate from the lower-middle classes: their parents were shopkeepers, technicians or paid employees, indicating the continued upward social mobility experienced by several generations of families of Galician origin in Buenos Aires.

We will now compare the patterns of insertion in the class stratification structure of the immigrant and native population in Spain and Argentina in the second decade of the twenty-first century (Table 8.1) and analyse the intergenerational social mobility rates for each group (Table 8.4).

As indicated earlier, in the case of Argentina, most immigrants from Latin American have a greater relative degree of insertion than the native population in

Table 8.1 Percentage distribution of immigrant and native insertion in the class structure. Argentina and Spain (2011)

Class position	Argentina		Spain	
	Natives	Immigrants	Natives	Immigrants
Service class (management and professional)	25.0	9.3	25.3	8.8
White collar workers	14.8	12.0	27.1	20.9
Petite rural and urban bourgeoisie	20.3	28.3	14.7	9.9
Skilled working class	11.3	13.8	10.3	16.8
Unskilled working class	28.6	36.6	22.6	43.6
Total	100.0	100.0	100.0	100.0
<i>N</i>	9,927	446	13,271	916

Source: the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrot and PISAC survey (Argentina) and the Spanish Statistics Agency's Life Conditions Survey (Spain)

Table 8.2 Percentage of class origin and destination distribution and % of dissimilarity. Argentina (2011)

Class position	Natives			Immigrants		
	Origins	Destinations	Δ	Origins	Destinations	Δ
Service class (management and professional)	14.6	25.0	10.4	9.6	9.3	-0.3
White collar workers	6.8	14.8	8.0	3.3	12.0	8.7
Petite rural and urban bourgeoisie	28.1	20.3	-7.8	36.4	28.3	-8.1
Skilled working class	16.8	11.3	-5.5	11.3	13.8	2.5
Unskilled working class	33.7	28.6	-5.1	39.4	36.6	-2.8
Total	100.0	100.0		100.0	100.0	
<i>N</i>	9,927	9,927		446	446	

Source: the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrot and PISAC survey (Argentina) and the Spanish Statistics Agency's Life Conditions Survey (Spain)

the unskilled working/precariat classes and the petite bourgeoisie (comprising mainly self-employed retail traders and blue-collar workers). In Spain, immigrants experience a greater degree of insertion in the unskilled and skilled working classes than the native population.

The comparative analysis reveals two common patterns. Firstly, in both countries the class insertion of the immigrant population takes place within the polarised class structure that is a feature of the current capitalist context. Immigrants provide the labour that meets the demand for unskilled employment. This pattern is slightly more evident in Spain, which has a more consolidated class structure. A second characteristic, related to the first, is that by entering the class stratification structure on the lower rungs, international migrants exert a kind of "push up" effect on the native population.

Tables 8.2 and 8.3 reveal that degree of dissimilarity between origins (the father's class status) and the class destinations (the class position of respondents of both

Table 8.3 % of class origin and destination distribution and % of dissimilarity. Spain (2011)

Class position	Natives			Immigrants		
	Origins	Destinations	Δ	Origins	Destinations	Δ
Service class (management and professional)	12.7	25.3	12.6	14.2	8.8	-5.4
White collar workers	12.1	27.1	15.0	13.3	20.9	7.6
Petite rural and urban bourgeoisie	26.4	14.7	-11.7	23.0	9.9	-13.1
Skilled working class	17.1	10.3	-6.8	15.4	16.8	1.4
Unskilled working class	31.8	22.6	-9.2	34.1	43.6	9.5
Total	100.0	100.0		100.0	100.0	
<i>N</i>	13,271	13,271		916	916	

Source: the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrot and PISAC survey (Argentina) and the Spanish Statistics Agency's Life Conditions Survey (Spain)

sexes) for both natives and immigrants in Argentina and Spain. This index provides an insight into the type of structural mobility experienced by immigrants in both countries.

In order to measure upward and downward social mobility, we calculated the *vertical mobility rate*, which crosses the principal hierarchical limits between social classes. This has traditionally been measured by grouping classes into three major categories, as a means of controlling horizontal movements. For the purpose of our study, we have followed the original grouping proposal of Erikson and Goldthorpe (1992: 45) readopted by Breen (2004).

In Argentina, immigrants tend to come from the lower classes and display a greater upward mobility in the host society, moving into the non-routine manual class, the skilled working class and the urban petite bourgeoisie made up of self-employed small retailers and tradesmen (Table 8.2). The table indicates a lower insertion percentage in the petite bourgeoisie in host societies, attributable to the fact that the origins of a considerable percentage lie in small-scale rural landownership (Class IVc). Furthermore, and as shown in Table 8.1, immigrants have a greater tendency than the native population for insertion in the petite bourgeoisie. In the case of Spain, employment in administrative work or the skilled manufacturing sector are also structural channels for moving upwards out of their parents' social class in the society of origin. However, it must be noted that in Spain, despite coming from higher classes in their society of origin and, as discussed in the previous section, having a higher level of education, a larger percentage joins the unskilled working class. This downward structural mobility in employment terms is offset by higher wages than in the society of origin. We will now study in greater depth the intergenerational social mobility rates of immigrants and natives in both countries (Table 8.4).

Table 8.4 Descriptive rates of the intergenerational social mobility of international migrants and natives. Argentina and Spain

Intergenerational social mobility rates	Argentina		Spain	
	Natives	Immigrants	Natives	Immigrants
Upward vertical mobility	32.7	25.7	34.6	19.5
Downward vertical mobility	20.1	21.9	17.3	32.0
<i>Reason for UVM and DVM</i>	<i>1.6</i>	<i>1.2</i>	<i>2.0</i>	<i>0.61</i>
Mobility from the working class to the service class	15.4	6.2	18.6	4.6
Dissimilarity between origins-destinations (Δ)	18.4	11.2	27.6	18.4
% service class at destination	25.0	9.3	25.3	8.8
Δ service class at origin	10.4	-0.3	12.6	-5.3
<i>N (men and women)</i>	<i>9,927</i>	<i>446</i>	<i>13,271</i>	<i>916</i>

Source: the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrot and PISAC survey (Argentina) and the Spanish Statistics Agency's Life Conditions Survey (Spain)

In both countries, immigration boosts upward social mobility due to its “push-up effect” on the native population. In Argentina, a considerable percentage of the native population is made up of the children of the latest migratory flow from Europe that occurred between 1949 and 1960 (mainly Italy and Spain). In both Argentina and Spain, the native population displays higher upward vertical mobility rates than immigrants.

Apart from this general shared pattern, both countries display a number of differences in terms of the absolute rates of intergenerational social mobility between immigrants and natives. Firstly, the upward vertical mobility rate of international migrants is higher in Argentina than in Spain. This is partly due to their humbler class origin, although a further factor may be that international migrants in Spain enter a more consolidated class structure and may therefore encounter higher levels of discrimination.

Secondly, whilst in Argentina the vertical downward mobility rate is similar for both immigrants and the native population, in the case of Spain, the rate for immigrants is almost twice that of the native population.⁴ It is also considerably higher in comparison with the rate for immigrants in Argentina. These results provide a working hypothesis for further research. International migrants in Spain obtain higher income than in their countries of origin, even though they enter the lower classes, frequently below their skills level. In Argentina, international migrants may well need to achieve a short distance upward class progression in comparison with their family of origin in order to obtain higher income than in their society of origin.

⁴This pattern is similar to that identified by Fachelli and López-Roldán (2017). The variance in values is attributable to the fact that their research calculates upward and downward social mobility in 5×5 tables and as indicated previously, in our case, 3×3 tables have been used to calculate vertical mobility. The results obtained reaffirm those of the earlier study.

Table 8.5 Log-linear model results of uniform differences (unidiff) by migrant status, origin class-destination class by country

	Phi parameters	
	Argentina	Spain
Natives	1	1
International immigrants	1.13	0.90
Goodness of fit ^a		
LR test (1 df)	0.5	0.9
Index of dissimilarity	0.02	0.03
BIC	8.7	8.6

*** $p < 0.001$ ** $p < 0.01$; * $p < 0.05$; + $p < 0.10$
 Source: the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrat and PISAC survey (Argentina) and the Spanish Statistics Agency's Life Conditions Survey (Spain)

^aIn comparison with a constant association model

Our analysis so far has addressed intergenerational social mobility rates influenced by factors of a structural nature, including the variation in class positions in the distribution of origins and class destinations. We will now go on to consider the impact of immigration on the general degree of social fluidity in both countries (Table 8.5). By social fluidity, we refer to the connection between classes of origin and destination, which provides a measure of the permeability of class boundaries in a society; in other words, the degree of inequality in terms of the distribution of opportunities (Breen 2004). Does the class structure offer the same degree of openness to natives and immigrants? Are the patterns similar in Spain and Argentina? The hypothesis posited by Tyree et al. (1979) states that immigrant fluidity tends to be greater than that of the native population because by leaving their society of origin, they can no longer follow in their parents' occupational footsteps. Fachelli and López-Roldán (2017: 312) offer a different hypothesis, namely that immigrants' mainly unskilled working-class profile currently implies an increase in social immobility.

The comparison of the social fluidity of natives and immigrants in both countries does not reveal any significant differences. Spain is closer to confirming the hypothesis of Tyree, Semyonov and Hodge, although the constant fluidity model is preferable. Following Fachelli and López-Roldán (2017) we analysed the impact of immigration on social impact from the perspective of time. Given the limitations of the immigrant sample size—particularly in the case of Argentina—, macro-cohorts were used (Table 8.6).⁵

International migrants in both countries display greater rigidity when analysed from the time perspective using macro-cohorts. In the case of Spain, immigration showed greater social rigidity, which in turn slowed down the more fluid trend

⁵For the purpose of following Fachelli and López-Roldán (2017), we included the patterns presented in their study, based on the calculation of relative mobility using 5×5 tables. In the case of Argentina, the immigrant sample size advised the use of 3×3 tables.

Table 8.6 Log-linear model results of uniform differences (unidiff) by migratory status, origin class-destination class, by country and macro-cohorts

	Phi Parameters						Immigrants
	Argentina			Spain			
	Total	Natives	Immigrants	Total Natives	Male natives	Female natives	
1951–1972	1	1	1	1	1	1	1
1973–1985	1.019	0.982	1.560	0.876	0.997	0.790	1.103
LR test (1 df)	Non-significant	Non-significant	Non-significant	Non-significant	Non-significant	*(significant)	Non-significant

Source: the Gino Germani Institute (University of Buenos Aires) surveys directed by Dr. Raúl Jorrat and PISAC survey (Argentina) and the Spanish Statistics Agency's Life Conditions Survey (Spain)

^aIn comparison with a constant association model *** $p < 0.001$ ** $p < 0.01$; * $p < 0.05$; + $p < 0.10$

registered by the native population, led by women (Fachelli and López-Roldán 2017). Following Chiswick (1978), the authors consider that this pattern may be attributable to the fact that new immigration in Spain is currently at the initial phases of the “U-shaped” pattern (inverted J hook) of the classic intergenerational social mobility trajectory.

However, in Argentina, international migrants display a closer connection with the social class of origin among the younger cohort. This rise in the influence of the social class of origin in the destination is much clearer than amongst immigrants in Spain, although the notably lower numbers do not affect the native population's constant fluidity pattern. In both countries, current day immigration comes from relatively less developed countries, comprising a non-European population, an object of discrimination by the host society. These findings allow us to pose the following question. Within the context of a consolidated class structure and Eurocentric social and cultural imaginary, could international immigration be considered a factor that favours the increasing fluidity of the native population of Europe ascent?

The current context of more structurally and culturally closed societies—compared with Argentina's social structure of between 1880 and 1930—poses greater obstacles to upward mobility for families of Latin American immigrant origin in Argentina. Yet despite this, their dense social networks provide a means for short distance upward mobility based on blue-collar work and technical trajectories that provide access to a consolidated working class and the lower middle class. In turn, this provides their children with a secure springboard to access the upper middle classes (Dalle 2020). A similar insertion trend is also observed in Spain that is capable of boosting the upward social mobility of the younger generations, although we have also noted a considerable declassing towards the unskilled working class. However, in this case, the fact that the remuneration is higher means that this may also constitute a more solid base for the upward social mobility of their children.

In addition to factors related to labour market dynamics and class closure, the migratory policies applied in each country also shed light on the varying degree of difficulty experienced by the immigrant populations in both contexts in terms of upward social mobility. Immigration from overseas was a cornerstone of project to construct the Argentinean nation throughout the nineteenth century and the first period of the twentieth century. Migratory legislation included a series of benefits for European immigrants (e.g. access to land during the early phases of agricultural colonisation and exemption from military service), contributing, in part, to the upward social mobility of European immigrants and their descendants. Nevertheless, from 1960 onwards, and set within a context shaped by the end of overseas immigration and continuous migratory flows from bordering nations, legislation aimed at updating the original law became more restrictive. The approval of the Migration Law (25871), passed in 2003 and regulated in 2010, guaranteed equal treatment for immigrants and their families under the same protective and legal conditions as Argentinean citizens (Pacecca 2006).

As with other southern European countries, immigration policy in Spain has centred on border controls, combined with certain measures for the employment of immigrants (contingencies, hiring programmes in the country of origin). However, these measures have failed to meet the heavy demand for immigrant labour for the secondary labour market, leading to the emergence of irregular immigration and a strong immigrant presence in the underground economy, together with insufficient policies in term of immigrant integration (Arango 2000; Izquierdo Escribano and Fernández-Suárez 2009; Boswell and Geddes 2010). This has resulted in the declassing of the immigrant population, as well as the worsening of their working and living conditions.

As the qualitative analysis in the following section will show, in addition to the weight of structural determinants, migrants' agency also provides an insight into social mobility trajectories in the migratory context.

8.6 The Social Mobility Strategies of Migrant Families Addressed Through Compared Case Analysis: Comings and Goings Between Galicia and Buenos Aires

Making it big in America? Social mobility strategies of Galician migrant families from the latest migratory wave in Buenos Aires.

As discussed in the methodology section, post-war Galician migrants (1940–1960) were essentially of rural origin with a very low level of education. An earlier study, whose conclusions are also reflected in this section (Oso et al. 2019), showed that the main strategy for upward social mobility deployed by these migrants was to embark on business ventures with fellow countrymen (restaurants, stores, bakeries and hotels), following in the footsteps of their predecessors that formed the first migratory wave in the late nineteenth century and encouraged by them.

Post-war Galician immigrants encountered a more closed class structure on arrival in Buenos Aires, in comparison with those that migrated in the late nineteenth century. Nevertheless, upward social mobility based on capital ownership, support from this group's dense social and business networks, forged and consolidated over the course of various migratory waves, helped them to make their way despite the less favourable context. This business strategy was also favoured by migratory projects. Unlike those that travelled to Europe in the 1960s and 1970s, post-war Galician migrants in Buenos Aires worked to consolidate their presence in the host context and centred their social mobility strategy on reinvesting their earnings in Argentina. In contrast, the migratory project of those that opted to migrate to Europe was of a more temporary nature, focused on saving up in order to return and invest in Galicia, effectively blocking their entrepreneurial strategies in Europe (Oso 2004), in comparison with those that chose to "make it big in America".

This entrepreneurial strategy was also based on working class endogamic couples who embarked together on a project for upward social mobility. They developed an austere and frugal lifestyle in which women played a central role, combining reproductive tasks in the home with work in the family business (Dalle 2013, 2016). Other studies (Núñez Seixas and Farías 2010: 70) have also pointed to a trend whereby values such as "hard work" and "saving" were passed from generation to generation, as a form of ethnic capital. In the case of the first generation of migrants, this took the form of the acquisition of properties, which were often then leased in order to boost income. The continuity of family retail enterprises cushioned the impact of periods of crisis for the descendants of these Galician migrants, and these inheritances acted as a means for continued upward social mobility. These inheritances proved to be a crucial intergenerational resource passed on to their children and grandchildren, favouring their access to classes with a higher socioeconomic status. In this sense, the accumulation of economic and patrimonial assets invested in Argentina represented one of the main strategies for intergenerational social mobility.

Secondly, migrants of Galician origin invested in human capital, facilitating the upward social mobility of their descendants thanks to their insertion in the Argentinean education system. However, the education achievements of the Galician migrants' children and grandchildren cannot be considered alone; they articulate with the other mobility strategies deployed, and in particular with the accumulation of economic and patrimonial assets. Indeed, the economic progress of their grandparents and parents' generations—the result of entrepreneurship—laid the foundations for the wellbeing that enabled their descendants to undertake secondary and university studies. Material accumulation was combined with socialisation within a culture of austerity, coupled with the desire for improvement (ethnic capital), encouraging them to grasp the opportunities provided by a dynamic context.

Gender, age and family position were further factors that influenced social mobility strategies. Our study revealed how university qualifications did not always lead to career achievements. Indeed, three devices were detected that effectively "blocked" educational mobility: gender inequality, position within the family and the time of migration within the life cycle. Elder children migrating with their

families of origin, or who were regrouped at a later stage, had fewer opportunities to follow long educational trajectories. This was particularly true in the case of elder daughters who were required to care for and bring up their younger siblings, therefore making it difficult for them to study. A large percentage of daughters of Galician families born in Buenos Aires managed to complete their secondary education, yet in the case of a number of women interviewed, chances of completing university degrees were blocked by motherhood.

Generally speaking, the children of Galician migrants tended to distance themselves from migrants' collective sociability spaces and networks in the hope of entering larger environments. This trend is stronger in the case of the grandchildren's generation. However, a number of families continued to socialise within the collective environment, thereby strengthening and increasing their social capital of ethnic origin, which would favour the processes of "getting back to their roots" adopted by those descendants that decided to return to Galicia, the land of their ancestors, in the wake of the 2001 crisis.

The study revealed how the various social mobility strategies do not occur in isolation but instead articulate others. Business and patrimonial strategies are underpinned by endogamic marriage, which in turn supports the education strategies for their children. Investment in co-ethnic capital also boosted entrepreneurship, whilst establishing a distance from the community provided opportunities for exogamic marriage as a means of upward social mobility.

As a result, in addition to education, there is also a complex network of articulated strategies, influenced by a migratory project rooted in the notion of settlement, which provides a crucial insight into the class trajectories of families of Galician origin in Buenos Aires. The predominant trend consists of long and short distance upward social mobility trajectories based on a succession of efforts and the accumulation of resources spread over several generations.

The Galicians' children and grandchildren inherited another type of capital that would prove crucial in order to migrate to Spain: Spanish nationality. Faced with the stagnation of the Argentinean economy during the final quarter of the twentieth century, those descendants of Galician families that were unable to convert their economic capital into a sufficiently high cultural capital, experienced a degree of downward mobility. Some of these children and grandchildren migrated to Galicia in search of better opportunities, as we shall see in the following section.

Argentineans of Galician origin in Spain: the enterprising spirit as a "refuge strategy".

The Equal Convive Mais project (Oso-Casas et al. 2006) revealed that in comparison with Spain as a whole, one of the specific features of Galicia as a receiving context for immigrants is the large number of descendants of Galicians who are "returning" to their ancestors' origins. As discussed previously, Galicia was one of the principal sources of overseas emigration in late nineteenth century and early twentieth century Spain. The principal destinations for Galician emigration were Argentina, Uruguay, Venezuela, Brazil and Cuba. Later, during the 1960s and 1970s, an alternative migratory flow to European countries emerged, essentially Germany, Switzerland, France and the United Kingdom. Between the late 1990s

and start of the twenty-first century, Galicia became a receiving region for immigrants, many of whom were returnees or the descendants of this historical Galician emigration. We can therefore distinguish between those migrants travelling from countries that are connected to Galician emigration (Argentina, Uruguay, Venezuela, Cuba, Germany, Switzerland, France and the UK), and those that do not share these connections, coming either from the bordering country of Portugal or forming part of the immigrant receiving dynamics that occurred throughout Spain and which we have discussed previously. In this latter case, the principal countries of origin are Colombia, Brazil, Morocco, Rumania and the Dominican Republic. Although in the past, Brazil had also provided a receiving context for historical Galician emigration, current flows of Brazilians do not correspond to returning migrants or the descendants of Galicians. Instead, they are related to the demand for labour, boosted by Galicia's proximity to Portugal and the considerable presence of this immigrant community in the neighbouring country.

A further conclusion drawn from the Equal Convive Mais project also showed that the majority of Argentinean migrants of Galician origin that migrated to their ancestors' place of birth, worked in paid employment in Argentina. They had an average-high income level and were employed in jobs fitted to their skills level, and in some cases had opportunities for promotion and training. However, and as we have seen earlier, the segmentation of Spain's labour market relegated these migrants to jobs that were far below their skills level (cleaning, care work, the building sector, catering and the retail trade). This is perceived as a sharp drop in their social mobility (Jiménez Zunino 2011). Faced with a more crystallised social structure, insertion is below their level of education, returning to the positions held by their grandparents at the start of the migratory cycle.

This leads many to opt for entrepreneurship, considered a kind of "refuge strategy" in order to move out of the precarious employment traditionally reserved for the migrant population. Opening their own business is seen as an alternative to the limited opportunities available on the Spanish job market. As Light (2002) stated, self-employment is a common phenomenon among immigrant workers due to the drawbacks of the labour market such as racial, ethnic and religious discrimination, but also to the difficulties in obtaining accreditation for their human capital. Indeed, this was a recurring theme amongst many of the interviewees, who perceived a breach in terms of their opportunities to enter the Galician labour market in comparison with Spanish workers.

"We start off trying to get paid employment. I worked as a waiter, bricklayer, painter; I did a bit of everything, whatever I could find, I tried a bit of everything. But as I was unable to find a good job, I had to work long hours for a pittance, we had the idea of setting up our own business". (Alfredo, an Argentinean entrepreneur) (Oso-Casas et al. 2006: 132).

"I worked as a kitchen assistant, cleaning houses and in a dry cleaner's. That's how things were at the start. Back in Argentina, I worked for an accounting firm, but I couldn't find anything here (...). So my husband and I decided to open a bar. It took us eight months" (Gloria, Argentinean, a bar owner) (Oso-Casas et al. 2006: 133–134).

The children and grandchildren of historical Galician emigration flows find it easier to set up their own business than immigrants from countries that are not

associated with Galician emigration. This is due to a series of capitals passed down to them by their ascendants who migrated to Latin America. These migrants bring with them a baggage that is not merely filled with dreams, but also inherited capital that will contribute to smoothing the path to entry in the host society and the creation of their own business. We will now take a closer look inside that baggage, from the perspective of the conclusions drawn from previous studies (Oso-Casas et al. 2006).

Since childhood, many of the Argentineans descended from Galicians had the chance to acquire a series of self-employment skills, based on the example set by their parents, most of whom were entrepreneurs in Argentina, as discussed previously. Socialised in their parents' family business, they have a seemingly greater ability to set up a business in comparison with immigrants in Spain from other countries. Several mention that their parents taught them the importance of saving in order to invest capital in the business and the need to be prepared to take risks. These skills were part of the socialisation process of several of our informants who were the descendants of Galician entrepreneurs. Indeed, many of those interviewed appear to play down the disadvantages of self-employment, considering it a natural option, even though they had been in paid employment in their country of origin and had never had their own business. They have inherited a particular form of ethnic capital from their parents: the enterprising spirit.

The regular legal status enjoyed by many Argentinean migrants of Galician origin in Spain, further fuels the feasibility of this entrepreneurial strategy in comparison with informants from countries that do not share ties with Galician emigration (Colombia, Peru, Brazil, Morocco and Senegal), whose status is irregular or who are required to take up paid employment in order to obtain regular legal status.⁶ Indeed, many of them are Spanish citizens prior to their arrival in Galicia, another form of capital passed on by their parents and grandparents (legal capital). Furthermore, Argentineans of Galician origin who arrived in the wake of the 2001 crisis were classified as "returnees" by the Xunta de Galicia (the autonomous community government), entitling them to a number of social benefits, including a financial subsidy during the months following their arrival in Spain. This gave them more time (as they were able to support themselves without working during this period) to sign up to entrepreneurship programmes, which on occasions also provided access to micro loans. Regular legal status and return subsidies proved essential for Argentineans of Galician descent that wished to embark on entrepreneurial initiatives, particularly in comparison with other Latin American immigrants who did not have access to these initial benefits.

Just like their parents and grandparents who travelled to America before them, the Galician descendants that came to Galicia in the wake of the 2001 crisis had a migratory project based on settlement. These settlement projects also favoured

⁶Spanish migratory policy requires that initial work permits are given practically exclusively to those in paid employment. In the case of Galicia, it is easier to obtain permits for jobs in the secondary market, in those encompassing labour niches reserved for the immigrant population in Galicia (domestic service and the construction and catering industries) (Oso-Casas et al. 2006).

entrepreneurial initiatives, as the migrant families were seeking to invest their savings and settle down “to a new life” in Galicia. This set them apart from other migrants from countries who were not associated with Galician emigration (Colombia, Peru, Brazil, Morocco and Senegal). This latter type of migration is characterised to a greater extent by people who initially migrated alone, leaving family members behind in their country of origin who they have to support. Many of them have a shorter initial migratory project centred on saving and return, thereby making it more difficult for them to set up their own businesses.

Moreover, Argentinean migrants of Galician origin have a social capital in Spain (family members contact networks), smoothing their arrival and providing support at the time of the initial insertion in the host society. Right from the start, self-employment was the preferred option for many respondents. Their Spanish family networks provided them with inside information regarding the labour market in Spain, the problems involved in obtaining accreditation for their studies, as well as the difficulty of finding a steady job in keeping with their qualifications and skills level. This social capital is also activated when seeking support to obtain financing for the initial investment in the business, such as bank guarantees.

The hardest part (in reference to setting up a business) is the initial capital. Of course you can do it if you have a bank loan, but you have to have the means to apply for one, ask for it and then have it approved (...) We had no trouble in that sense because I have a lot of family members here; so it wasn't hard at all: an uncle of mine signed for me (in reference to the bank guarantee) (Antonio, an Argentinean with a bar in Vigo) (Oso-Casas et al. 2006: 147).

Finally, many possessed properties or financial capital that on occasions had been inherited from their ascendants and that they chose to sell prior to leaving Argentina in order to invest in Galicia. Unlike immigrants of the Galician descent, those with no connections to Galician emigration (from Colombia, Peru, Brazil, Morocco and Senegal) not only lacked this initial capital, but also often were in debt on their arrival in Spain. In addition, many have to send remittances back to their country of origin, further reducing their investment options. Galician descendants also experience less “discrimination” or hostile attitudes from the autochthonous population, factors that are conducive to greater opportunities for the children and grandchildren of historical Galician emigration.

In reference to the money invested in the business: “It was all savings. We didn't have to borrow anything (in reference to the bank). It was as simple as that; what we brought over, saved up throughout our entire lives, was invested here”. (Alfredo, Argentinean, owner of a newsstand). (Oso-Casas et al. 2006: 142).

This testimony reveals how certain Galician descendants managed to embark on entrepreneurial projects shortly after their arrival in Galicia. This contrasts sharply with immigrants from other countries that have no ties with Galician emigration, who took years to achieve their dream of setting up a company. The following table (Table 8.7) provides a comparative summary of the factors that condition successful entrepreneurial trajectories and favour immigrants from countries associated with Galician emigration.

Table 8.7 factors conditioning the success and failure of immigrant business ventures

Factors favouring the entrepreneurial trajectory among the returned population or migrants of Galician descent (associated with Galician emigration) (Argentina, Uruguay, Venezuela)	Factors blocking or hindering the entrepreneurial trajectory experience by the immigrant population with no associations with Galician emigration (Colombia, Peru, Brazil, Morocco and Senegal)
Socialisation since childhood, within a context of self-employment	No previous experience in self-employment
Possession of Spanish citizenship	Irregular legal status
	Having to have previous paid employment in order to regulate their legal status
Access to benefits (financial aid for returnees, etc.)	Working in paid employment and not having enough time to take part in entrepreneurship programmes
Access to aid programmes for entrepreneurs (access to microloans)	
Having sufficient free time to attend training courses	
A migratory project based on settlement	A temporary migratory project based on saving and return

Source: Reworked on the basis of the chart drawn up by Oso-Casas et al. (2006: 161)

It is therefore clear that the accumulation of this set of capitals (economic, legal, social and ethnic capital, and an entrepreneurial spirit,) many of which were inherited from the Galicians that emigrated to Argentina in the late nineteenth and early twentieth centuries and passed down from generation to generation, are of value on both sides of the Atlantic, within the framework of transnational social mobility strategies.

A transnational vision of migrants' social mobility strategies reveals that entrepreneurship represented a social mobility strategy for the Galicians that migrated to Argentina (combined with endogamic marriage, recourse to ethnic capital, including a mentality rooted in frugality and the need to save). In turn, this favoured the intergenerational strategy of achieving social mobility for their descendants, mainly through education (human capital).

However, for the children and grandchildren that chose to migrate to Galicia in the wake of the 2001 crisis, self-employment provided a "refuge strategy", protecting them against a loss of social status, in the light of a labour market that limited opportunities for the immigrant population to low-skilled jobs. The skills acquired during childhood by these children and grandchildren of Galician entrepreneurs (ethnic capital, such as an enterprising spirit and socialisation amongst the Galician collective), as well as their financial capital (properties and accumulation of economic resources) and social capital (family networks in Galicia), are reworked and used as a buttress against the risk of becoming ensnared in the secondary sector employment niches traditionally reserved for the immigrant population in Spain.

Our work highlights how social mobility feeds on the intergenerational accumulation of capitals. Yet in addition to focusing on economic, human and social capital,

it also reveals how migration provides a channel for the transmission of alternative forms of capital (legal and ethnic), which are used by migrants within the framework of transnational and intergenerational social mobility strategies.

8.7 Conclusions

A journey marked by comings and goings reflects the social and spatial mobility of migrant families on both sides of the Atlantic. In Europe, men and women packed their bags in the late nineteenth and early twentieth centuries and set sail for Latin America. Yet the late twentieth century saw a change of direction from Latin America towards Europe. A reverse migratory flow emerged, which in some cases included the descendants of those earlier European emigrants, who began to see their ancestors' "old world" as a solution to the social stagnation that was spreading through their region of birth. In turn, some Latin American countries such as Argentina, also became the recipients of interregional immigrants.

What impact did these migratory flows have on the destination societies and on the social mobility trajectories of the migrants and their descendants?

Early migration from Spain to Argentina has already fomented social mobility in Argentina, generating a "push-up effect" among the descendants of European immigrants. In turn, the Latin American migration to Spain that emerged in the late twentieth century, also acted as a boost for the native population in the Spanish class structure.

Nevertheless, a difference can be drawn between the Spaniards that migrated to Argentina between 1940 and 1960 and the Argentineans that have moved to Spain in recent decades. In the former case, the population came mainly from rural areas with a low level of education, whilst in the latter case the level of education was average-high. Whilst the Spaniards in Argentina (nineteenth century and early twentieth century) experienced a marked upward social trajectory, attributable to their initially low status within the social structure, many of the Argentineans that migrated to Spain from the late twentieth century onwards experienced a process of declassing, the result of a segmented labour market that limited their opportunities to low-skilled manual work.

Our quantitative analysis of immigrant insertion in the class structures of the host societies (Argentina and Spain) makes a number of contributions. Firstly, it reveals that the migrant population in both Spain and Argentina fills the demand for low-skilled/manual work. However, it must be stressed that this trend is slightly stronger in Spain due to its more consolidated class structure. Their entry at a lower point in the class stratification structure means that international migrants exert a kind of "push-up effect" on the native population.

Secondly, international migrants in both countries displayed greater rigidity than the native population (i.e. the greater weight of the original social class over the class attained in the destination). Indeed, they enter a consolidated class structure at the low-skilled and precarious levels of the working classes, and a large proportion

of them never move out of them. Finally, immigrants in Spain obtain higher incomes than in their countries of origin, even though they enter the class structure on a lower rung, often below their skills level. In Argentina, the indications are that migrants need to achieve a short distance upward class mobility in order to boost their income.

Our quantitative analysis also provides an insight into the way the social mobility trajectories of families of migrant origin are influenced by a series of structural factors. The arrival phase of the various migratory trends, linked to the degree of economic dynamism, the labour market situation and growing occupational/educational opportunities are all conditioning factors. Another key element in this sense is the way class boundaries are structured in the host society. Finally, state migratory policies are also a major determining factor.

However, our qualitative approach indicates that in order to analyse the connection between migration and social mobility, other factors related to the social mobility strategies implemented by migrant families in the transnational space must also be taken into consideration, thereby complementing the results obtained from the analysis of the secondary data.

The primary contribution of our fieldwork, conducted within the framework of other research projects,⁷ is that social mobility strategies are intergenerationally linked and take place within the transnational space. Galician migrants in Argentina, who came from rural environments and had a low level of education, opted for entrepreneurship as a means of securing upward social mobility. The accumulation of wealth and the transmission of a culture based on hard work and austerity (ethnic capital), targeting educational achievements, formed a solid base that boosted the upward mobility of their children and grandchildren who obtained educational qualifications.

The 2001 economic crisis drove a number of these descendants of Galicia to migrate to Spain where their university qualifications failed to secure success on a labour market that failed to acknowledge these credentials and where immigrants were pushed to accept manual/low-skilled work. In the light of this situation, many Argentineans of Galician descent opted for entrepreneurship, taking advantage of their social and financial capital as well as their beneficial legal status (citizenship) inherited from their antecedents. They championed the entrepreneurial spirit (ethnic capital) instilled in them by their parents and grandparents as a “refuge strategy” against social declassing.

The baggage of migrants of Galician descent is filled with a series of economic, legal, social, cultural and ethnic forms of capital based on a positive self-assessment of the endo-group, as well as a set of skills, knowledge and behaviour patterns, part of the legacy passed on by their parents and grandparents. They exploited this legacy in order to curb the social declassing experienced by other Latin American immigrants in Spain. Indeed, the succession of intergenerational strategies, passed on and connected by various generations of migrants within a transnational setting,

⁷(References: FEM2011–26110; FEM2015–67164-R; GRC2014/048; FSE-EQUAL-2004).

explains the greater resilience experienced by migrants of Galician descent to social declassing (i.e. employment below their skills level).

One of the main contributions of our work is that it highlights the importance of an analysis capable of articulating the explanations provided in the light of a number of structural determinants (i.e. the labour market and migratory policy), together with the social mobility strategies of migrants and their families within the transnational space. This indicates the agency capacity of the players in this tale. Migrants have their own social mobility dreams and expectations, and migratory projects may vary in accordance with the characteristics assumed by endo-group migrants in the host society and their ties with the society of origin. Migratory projects, combined with migrants' dreams of social ascent (based on a project of saving and return or settlement) determine the social mobility strategies deployed within the transnational space.

Our work also contributes to scientific debate by showing that social mobility strategies may be of an alternative nature (beyond education and employment, traditionally the main focal points of literature), such as economic or asset based, or through marriage.

The originality of our approach also includes our findings on the intergenerational mobilisation dynamics within the transnational space of various forms of capital, namely social, wealth/asset-based and citizenship. Ethnic capital, is another type, comprising the group's own culture (in terms of shared codes and values, attitudes, aspirations and skills acquired over time), as well as the self-valuation of their own culture and the habitus passed on from generation to generation (including the entrepreneurial spirit). This capital, together with social capital, plays an essential role that leads to unequal opportunities for upward social mobilities among the various groups.

This series of inputs leads us to a final reflection addressing the link between social and spatial mobility, which forms the main conclusion and contribution of our chapter to scientific production. If migration has a positive effect on the social mobility of the native population, it also has the capacity to reproduce social inequality for the migrant population within a context of more closed social structures and restrictive migratory policies. This situation blocks migrants' dreams of social ascent due to the ethnic segmentation of the labour market. Nevertheless, considering the relationship between migration and social mobility from a transnational dynamic that looks beyond the host country, allows us to identify the social mobility strategies (not only related to employment and education, but also wealth/assets and marriage, etc.) deployed by social actors. These strategies, coupled with the activation of different forms of capital, passed down from generation to generation (economic/asset-based, social, ethnic, citizenship) within the transnational space, enable migrants and their descendants to tackle the social blocking and "immobility" devices operating in the societies of origin and destination. Baggage filled with capital in varying forms that travels from one side of the Atlantic to the other, cushioning the blows in the struggle to achieve dreams of social mobility.

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Chapter 9

Changes in Economic Inequality in Europe and Latin America in the First Decades of the Twenty-First Century



Agustín Salvia

Abstract This chapter contains a comparative analysis of the changes in the inequality of family income distribution in the last two decades in Latin America and Europe. The study examines the degree to which the economic-productive factors—associated with the primary income distribution—or, on the contrary, the social policies—linked to the secondary distribution—reveal structural differences in economic inequality between regions in the 2000–2017 period. Based on a wide sample of countries, the evolution of inequality is compared within and between regions. The dissimilarity of these behaviours is examined as well as how valid certain economic-institutional factors are to give an account of the changes that occurred within each region.

The chapter shows that, in the last two decades of the twenty-first century, Western Europe and Latin America have reduced their economic inequality gap, although following different paths: while inequality decreased in the majority of Latin American countries, an inverse process, although moderate, has been taking place in the majority of Europe. While both trends had national exceptions, the evidence presented helps us to deduce that it was simultaneously due to productive changes and to changes in the growth style, and to transformations in the redistributive efficiency of expenditure on social policies.

Keywords Economic inequality · Income distribution · Comparative analysis · Europe · Latin America · Structural heterogeneity

A. Salvia (✉)

Observatorio de la Deuda Social Argentina, Universidad Católica Argentina,
Buenos Aires, Argentina

e-mail: agustin_salvia@uca.edu.ar

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9.1 Introduction

The international community has made considerable progress at overcoming poverty. The most vulnerable nations continue to advance in this sphere. However, inequalities and huge disparities in income distribution continue, which appear to affect economic development and social integration capacities on a global scale (UN 2015; OECD 2013; Dollar 2005).

The aim of this chapter is to perform a comparative analysis of the structural differences and changes that have taken place in income distribution in the twenty-first century thus far for a selection of countries from Latin America and Europe, as well as within each region and between both regions. The aim of this analysis is to examine the dissimilarities between certain explanatory patterns associated with the changes that have taken place in inequality. A main question to answer is to what degree productive factors associated with the primary income distribution, or social policies, associated with the secondary income distribution, reveal both structural patterns and cycle changes in economic inequality between both regions during the 2000–2017 period.

Economic literature distinguishes between, on the one hand, the sources of “primary” (or functional) income distribution (distribution of income in the capital-labour relation) and, on the other hand, the sources of “secondary” distribution (public or private transfers from rents, gifts or taxes), whose flows are in some way removed from the added value generated by the capital-labour relation and/or the country’s trade balance (Krugman et al. 2008).

While economic inequality generally refers to the distribution of income or assets between individuals and groups within a country, the term also applies to aggregate inequality across territories or regions. In this regard, according to data available on income distribution—measured using the Gini index—Europe is the region with greatest distributive equity on the planet; while Latin America is one of the most unequal (Keeley 2018; World Inequality Lab 2018; OECD 2013; Dollar 2005).¹

It is important to underscore that while the social policies implemented by the European welfare states have facilitated high degrees of productivity, economic prosperity and social cohesion (Moreno and Palier 2005; Moreno 2015; Guillén et al. 2016), this is not the case with Latin-American states. These, in general, are characterised by strong productive heterogeneities, segmented labour institutions and low density or regressive social security systems (CEPAL 2014; Barba Solano 2007; Barba Solano and Cohen 2011; Salvia 2015; Bárcena and Prado 2016).

In recent years a research line has opened up dedicated to the analysis of the evolution of the participation of the wealthiest families and individuals in the income distribution available per country (Atkinson et al. 2011). The main

¹The Gini coefficient is a measure of income inequality in a country, but it can be used to measure any form of unequal distribution. It is a number between 0 and 1, where 0 corresponds to perfect equality and 1 corresponds to perfect inequality.

conclusion from this research is that during the twentieth century the participation of income from the wealthiest was U-shaped, reducing during the first half of the century, increasing during the second half, with the improvements being concentrated in the highest percentile of the income available in the majority of the countries analysed. Piketty (2015) summarised this process by arguing that any increase in the rate of return of capital above the economic growth rate leads to the concentration of income and, consequently, to an increase in inequality. The different authors who studied inequality provided various explanations for the concentration of income: the type of political economy, financial downturns, technological changes, globalisation, labour regulations, human capital and taxation, although there is no consensus in this regard.

The income distribution in each country is the result of the complex interaction of innumerable economic, demographic, social and institutional factors. According to the UN (2015), although the inequality in the income distribution between countries seems to be reducing, within the countries themselves it appears to be increasing. In this regard, there is increasing consensus that economic growth is not sufficient to reduce poverty if it is not inclusive or does not tend to reduce social inequalities (Keeley 2015; OECD 2013). With a view to reducing both poverty and inequality, the application of security and universal social protection policies has been recommended which also pay particular attention to the needs of the underprivileged and marginalised (ILO 2011, 2013, 2014; Dollar 2005; Barrientos and Hulme 2008; Lustig et al. 2016b).

Inequality in income distribution on a global or regional level reflects the combined effect of inequality within countries and inequality between countries or regions. In this respect, the historical evolution of inequality on a global level reveals that following a period of an increase in inequality, a reduction in the inequality within countries is recorded, but with an increase in the gap between countries. More recently, the trend has changed: inequality tends to increase within countries and to reduce between countries (Atkinson 2015). This *inverted U-shape* in the inequality between countries is usually an encouraging base which guarantees that the global distribution will show less inequality in the future. Nevertheless, following Atkinson (2015: 72–73), there are justified reasons to be wary. Firstly, while the gaps are reducing in relative terms, the absolute differences in terms of real per capita income continue to widen. Secondly, while some large countries have grown rapidly (such as China and India), many other developing countries have done so at a much slower rate.

Explaining the factors that shape the income distribution in and between countries is a complex task. With a view to examining and comparing the changes in economic inequality in societies in Europe and Latin America, as well as between both regions, the aim of this chapter is to analyse the effect of a series of underlying structural factors on the way in which said inequalities are managed, in order to understand the role played by such factors in the convergence/divergence processes within and between the regions studied. In this context, an important aspect is to be able to determine the role played by primary income distribution and secondary

income distribution in the structuring of the inequalities in each country, between the countries from each region and in the inequalities of both regions.

In modern capitalist economies the average income level of countries is widely related to productivity and, therefore, it depends on the degree of technology and the amount of physical capital employed in production. In general, increases in productivity are accompanied by an improvement in living conditions, as long as the labour institutions, tax systems and social security systems in operation promote the redistribution of the income. Among the countries in the world there is a clear correlation between income inequality, wage and collective bargaining regimes, the existing tax level, the type of tax policy and the social expenditure of the governments. In the most unequal countries it is common to observe weak unions, flexible labour rules and few progressive taxes, which also seems to be associated with weak, restricted or regressive social security systems (ILO 2014).

Economic inequality comprises disparities in the distribution of economic income, especially the primary income distribution generated by the capital-labour relation. Moreover, public or private transfers of income—whether through social security, social and family strategies or market rents—play a relevant role in capitalist economies in the way that they reduce, offset or worsen the economic inequalities resulting from primary distribution (Keeley 2015; Atkinson 2016).²

The present work seeks to explore this argument through the presentation of an analytical outline. This outline systematises the different ways in which the economic growth model (primary income distribution) and the social policies (secondary income distribution) are associated with inequality in the distribution of household incomes. In this context, a particularly relevant goal is to assess how and in what way the different paths followed can be explained by more structural factors affecting each region-country. These factors are the productivity of the capital-labour relation (in terms of structural heterogeneity, institutional regulation models and ways in which these factors segment the labour demand), and the role of social expenditure in the gross domestic product (as an expression of the level of coverage and redistribution of the income provided by social policies).

As we will seek to demonstrate, the socio-economic differences between both regions, and their evolution to date this century³, do not necessarily coincide with the differences observed and the changes that have taken place in inequality—measured by the Gini index—within each region and between both regions. This particular behaviour which appears to describe a “convergent” development process, both on a welfare level and in terms of equity, can be more precisely explained when the average labour productivity (as an expression of the capacity of primary

²The regulatory institutions working towards correcting inequalities can be classified into two groups, according to the time at which they operate: (1) some seek to act directly—*ex ante*—on the source of the inequalities in the labour market; these are called pre-distributive and (2) others do it *ex post*, working towards reducing the inequalities generated in the labour market; these are called post-distributive (Hacker 2011; Zalakain and Barragué 2017).

³Both in terms of economic development—measured by GDP per capita—and its effects in terms of welfare for the population—measured by poverty lines with comparable PPPs—.

income distribution) is related over time on a national level to the proportion of social expenditure in the GDP of each country (as a representation of the coverage level and scope of the secondary income distribution).

In this context, firstly, the chapter analyses how different or similar the societies of both regional systems are in terms of GDP per capita, poverty and distributive inequality, as well as exploring the development paths taken by both regions in the last few decades. To do so, we examine a selection of countries from both regions, for which we were able to obtain comparable information. Secondly, assuming the presence of unequal degrees of welfare-inequity between regions-countries, the study seeks to determine the distributive changes that have occurred during the past few decades. In this regard, in order to identify the weight of the factors underlying the different paths that income distribution has taken in both regions, the average labour productivity, the level of social expenditure and its effects on inequality for each country are related.⁴

To this end, in order to obtain a robust descriptive classification, following the comparative method, in other words, assuming that the national systems for each economic period are theoretical analysis units, a factorial model of main components was adjusted, using stacked time windows as registers for each country considered. The analysis models applied gather data from the 2000–2017 period for 44 countries, 26 from Europe and 18 from Latin America, dividing the groups into four periods: 2000–2004, 2005–2008, 2009–2014 and 2015–2017.⁵

9.2 Conceptualizations

In recent years a growing academic concern for economic inequality has been observed, due to the concentration of wealth in increasingly smaller groups of people, families and corporations and the political implications of these processes on the functioning of democratic societies (Therborn 2013).

The study of global economic inequality focuses on “income distribution”. From this perspective it is assumed that the current income of households is a key factor for the social welfare of the population. From the point of view of social scientists, the dominance of the study of monetary income distribution often jeopardises the

⁴The analysis of these matters, from a perspective of the factors associated with income distribution, leads us to consider a methodological strategy of comparative analysis between countries which opens up the possibility of developing theoretical formulations that transcend the borders of a society (Holt and Turner 1970). These analyses provide relevant conclusions to progress in this line of research in international comparison.

⁵Countries considered in Latin America: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Guatemala, Mexico, Peru, Uruguay, Ecuador, El Salvador, Honduras, Nicaragua, Paraguay, Panama, Dominican Republic and Venezuela. Countries considered in Europe: Spain, Finland, France, Italy, Poland, Portugal, United Kingdom, Romania, Germany, Austria, Belgium, Bulgaria, Cyprus, Croatia, Denmark, Slovakia, Slovenia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, The Netherlands, the Czech Republic and Sweden.

possibility of reaching a wider understanding of social inequalities. However, its contribution is vital to understand how the way the main source of welfare is distributed in market economies is crucial for the progress of families and the social life of people.⁶

The evolution of inequality in income distribution has summoned the interest of multiple studies. Its historical global evolution has been well represented by Piketty (2014) who showed how the concentration of wealth in the global economy has grown since 1980. There is agreement that the key period of the twentieth century was marked by a reduction in the distributive inequality of the global income and that this trend reverted in recent decades, recording a new increase in the income gap between the poor and the rich. Nevertheless, the literature is not conclusive as regards determining the trend followed by income distribution between countries and regions in the world, or as regards the factors that could explain the different processes.

On the one hand, the evidence appears to confirm a cycle of relative convergence between rich and poor regions during the first decade and a half of the twenty-first century. This seems to impinge upon the continued growth toward global inequality in income distribution (Atkinson 2015; Molero Simarro 2013; Keeley 2018). However, the conclusions about the factors underlying these processes are not conclusive. On the other hand, the works that have studied the general relation existing between inequality, growth and poverty do not have a definitive response about how and to what extent the former fosters or hinders the latter two (Molero Simarro 2013).

However, at this point, the arguments tend to agree on the limitations of Kuznets' theory (1934) about the causal contribution of growth as a subsequent factor of social balance. The apparent failure of Kuznets actually reflects another problem that economists face when determining the link between inequality and growth, namely: if there is a relation, it does not seem to be direct. If it were, we could at least, in theory, calculate the growth rate of a country based on its inequality level (Keeley 2015). This topic requires further exploration, considering the particular inverse relationship there appears to be between inequality and growth—contrary to the theory of Kuznets—in the context of modern societies. In other words, both the empirical research and the main global economic organisations (OECD, IMF, WB, IDB) agree on highlighting that at least excessive inequality is not good for growth.

In particular, according to the OECD, a greater wealth gap makes low-income families invest less in education and skill-training, which affects growth by causing a decline in qualified workers. Other authors consider the effect of inequality on political and social instability (Ostry and Berg 2011). In turn, Stiglitz (2000)

⁶Atkinson made a special contribution to the measurement of inequality. He looked at income inequality from a non-conventional perspective, as the loss of social welfare associated with an unequal distribution of income. In other words, he considered the analysis of inequality as a foundation for policies and suggested a series of specific measures to reduce it. The final aim of Atkinson (2015) was to transform the economic analysis into political action, and to do so he recommended new ambitious policies in five areas: technology, employment, social security, distribution of capital and taxes.

highlights the collusion processes linking the political sectors with the wealthy classes, achieving that the latter monopolise the majority of the economic surpluses, affecting the demand of consumer goods and distribution among the poorer classes.

But in addition to wondering if inequality affects growth, it is equally important to examine how the level of economic productivity of countries determines, conditions or influences—through different channels—the direction of both primary and secondary income distribution.⁷ The primary distribution of social income takes place in the production process and is determined by the way in which the added value is distributed between wages and capital, including the mixed income of the self-employed worker or professional. To change the primary distribution, marginal productivity, wages and profits of the self-employed, the businessmen or the companies must be modified. For its part, the secondary distribution of income is that which is made through rent or transfers, whether public or private. It is mainly focused on the transfers that governments make to families through the systems—contributive or non-contributive—of security or social protection, and in the public or private mechanisms of income distribution, royalties, loans or gifts.

During the last quarter of the twentieth century and the current twenty-first century, both Western Europe and Latin America have undergone profound transformations in their social structures in the context of the global changes resulting from international political-economic conditions, with different scopes and impacts depending on the way in which each society absorbed, regulated and processed these trends. The twenty-first century is a period of exhaustion, transition and redefinition of these processes. The impact of these changes on the social reproduction patterns of economic inequalities, both in direction and in magnitude, has not been sufficiently explored by the literature. While there are studies of national cases, and even, analyses based on comparisons between countries from one same region, interregional approaches that explore the factors or social processes underlying these inequalities are particularly scarce.

In the case of Europe, the region has been subjected to a double inequality effect. While the European economic integration process reduced the inequalities between nations until the first decade of the twenty-first century, the convergence was partially interrupted due to the effects of the economic and financial downturn in 2008 and the adjustment policies that greatly affected the social and welfare budgetary items (Moreno and Palier 2005; Moreno 2012; Del Pino and Rubio 2016). The impact of the recession would have, as is well-known now, consequences on the

⁷Apart from several exceptions (Atkinson 1975, 2009), the studies that explore the correlation between productive capacities and interpersonal income distribution establish purely empirical relations between them (see, for example, Daudey and García-Peñalosa 2007; or Adler and Schmid 2012). In fact, in his chapter in *The Oxford Handbook of Economic Inequality*, Andrew Glyn concludes that there is a “need for more research to determine the causes of the oscillations in the factorial participations and to establish a connection between the personal and functional distributions of income” (Glyn 2009: 104).

living conditions of Europeans, with an increase in poverty especially in countries in the south of Europe, compared to Scandinavian and Continental European countries. Therefore, within the European Union there is significant inequality across one territorial base (Del Pino and Gago 2017). However, the more or less generalised maintenance of a widespread welfare model, widely legitimised by political and social sectors, seems to restrict a greater deterioration in the context of the Great Recession (Moreno 2016; Guillén et al. 2016).⁸

The present work provides evidence that helps to determine the nature of the recent changes that have taken place in economic inequality between and in both regions. This task shows the different distributive roles they play, depending on the case, the sources of income, as an expression of the different roles played by labour productivity, the associated payment and social policies.

9.3 Comparative Study of Countries from Latin America and Europe

The general characteristics of the economic and social structure of Europe and Latin America, and their consequences on welfare, show relevant systematic differences with respect to aspects associated with their socio-productive development. These differences are not new, they developed as a result of different accumulation processes, particular economic-productive dynamics and structures, and different historical and institutionalisation processes of power relations, through socio-occupational, welfare and social protection institutions. The comparative examination during the twenty-first century to date is a relatively unexplored path of study, as is its relationship with the changes that have taken place in income distribution in each region and globally.

In order to explore these topics, the information gathered provides evidence about the different regional conditions that shape the accumulation dynamics, social intervention by the State, and income distribution in a wide sample of national systems from both regions. Through this strategy, we hope to attain a robust description of the economic inequalities for a selection of countries from Latin America and Europe, including the socioeconomic inequality processes (and the reproduction of these) in force during the first decades of the twenty-first century. While the analysis is based on the comparison of the countries in the last 18 years, it is important to highlight that the continents have significant and longstanding socioeconomic structural differences. The comparative analysis model is applied to the selected countries, gathering information for four periods: 2000–2004, 2005–2008, 2009–2014

⁸The European social model is a political project built around social equity, collective solidarity and productive efficiency values. In this framework, the welfare state, that is, a set of social policies aimed at improving living conditions and to achieving equal opportunities for all citizens, is the foundational institution of this model. Despite the recession, the social public expenditure in the continent represents between one fifth and one third of the GDP (Moreno 2016).

and 2015–2017, using social welfare indicators based on available secondary sources.

Firstly, both for each separate period and for the total number of years considered in the sample, Table 9.1 presents the inequalities existing between the countries from each region, between regions and all the countries, and their changes over time. In particular, the following table shows data of two key welfare indicators: GDP per capita and poverty rate (less than US\$5.5 PPP—Purchasing Power Parity—). For their analysis, both regional averages and their coefficients of variation are shown. Since we are examining very unequal regions, analysis of the coefficient of variation helps to compare internal differences.

If the general averages of the economic welfare indicators are analysed, improvements can be observed both per region and for all the countries; there is even a certain tendency to converge as a result of the greater relative progress made by Latin America in poverty. However, upon analysing the coefficients of variation (CV), the ratio between the standard deviation and the average data, for each indicator, it can be deduced that both differences between regions and between countries prevail in each region.

As regards the GDP per capita, while it has improved in both regions separately and together, the differences between Europe and Latin America persist: even when the gap reduced slightly, the average in Latin America continues to be approximately one third of the average GDP in Europe. Likewise, the coefficient of variation has reduced in Europe, but it has increased in Latin America, illustrating an increase in inequality between countries from Latin America in terms of average income per inhabitant.

Table 9.1 Evolution of welfare indicators: GDP per capita and Poverty. Latin America and Europe (Years 2000–2017)

	2000–2004	2005–2008	2009–2014	2015–2017	Total 2000–2017
GDP per capita—In million US\$ PPA					
Europe (26)	27.171	31.059	31.020	33.616	30.717
CV EU (26)	38.2%	31.0%	29.1%	25.7%	30.2%
Latin America (18)	9.193	10.681	12.186	13.178	11.349
CV LA (18)	42.6%	44.0%	43.7%	44.1%	42.4%
Total EU + AL (44)	19.817	22.722	23.315	25.536	22.793
CV Total (44)	61.5%	56.6%	51.9%	49.5%	54.1%
Poverty (5.5 US\$ PPA)—In % of people					
Europe (26)	3.6	3.9	3.6	2.9	3.9
CV EU (26)	149.9%	186.1%	165.2%	178.0%	158.9%
Latin America (18)	45.6	36.6	28.6	21.6	34.0
CV AL (18)	25.8%	32.6%	46.3%	57.2%	38.6%
Total EU + AL (44)	21.9	17.9	13.5	9.9	16.2
CV Total (44)	103.9%	105.5%	115.1%	125.9%	109.4%

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

CV Coefficient of variation, PPA Purchasing power parity

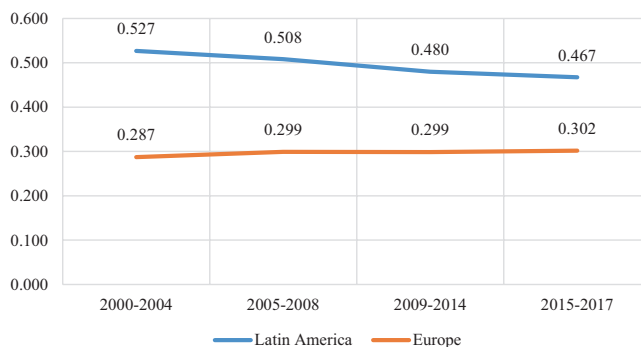


Fig. 9.1 Gini coefficient evolution. Latin America (Gini coefficient of family per capita income calculated in the distribution of people.) and Europe [Gini coefficient of equivalent income (OECD scale for normalization of household size) calculated in the distribution of people.]. (Years 2000–2017) National averages in points of the Gini Coefficient. Source: own elaboration based on EUROSTAT and CEPALSTAT for sample of selected countries

As regards poverty, in addition to a significant reduction over time, both per region and for the total number of countries, the coefficient of variation reflects a considerable increase and reproduction of inequalities; with Europe in this case presenting distinctively lower poverty rates, although with greater intra-region variation. For Latin America, on the contrary, the trend seems to have been remarkably positive, although with less internal variation, but with an increase in the inequalities between countries.

In this way, the results in welfare are as expected. At least the regional averages for the countries considered in each case present significant differences that persist over time. While the trends in the internal inequalities in each region do not provide as clear a behaviour as the interregional convergence. However, beyond the fact that these differences in the socioeconomic welfare appear to be structural, it is important to ask how unequal the countries making up both regions are in terms of income distribution and what their comparative behaviour in this social dimension has been in the twenty-first century.

In this respect, Fig. 9.1 confirms relatively well-known situations, both in terms of the structural differences that exist between the regions being studied, and in terms of the convergence process that has taken place in the last lustrums in distributive inequality measured by the Gini coefficient. While the data presented are average values, it is evident that the convergence process conceals a greater relative decline in the Gini coefficient of countries in Latin America.⁹ With a view to

⁹Recent literature analyses the possible reasons for the reduction in inequality, such as Azevedo et al. (2013), Lustig et al. (2016a), de la Torre et al. (2017) and Busso et al. (2017), among others. Despite this reduction in inequality, Latin American and the Caribbean continue to be some of the more unequal regions.

Table 9.2 Gini Coefficient evolution within and between regions. Latin America^a and Europe^b (Years 2000–2017)

Gini Coefficient <i>Coefficient: 0–1</i>	2000–2004	2005–2008	2009–2014	2015–2017	Total 2000–2017
Europe (26)	0.287	0.299	0.299	0.302	0.297
CV EU (26)	14.7%	14.6%	12.3%	13.6%	12.7%
Latin America (18)	0.527	0.508	0.480	0.467	0.496
CV LA (18)	10.2%	9.0%	9.8%	10.5%	9.4%
Total EU + LA (44)	0.392	0.387	0.373	0.370	0.378
CV Total (44)	32.9%	29.3%	26.5%	25.3%	28.3%
Gap LA/EU	1.83	1.70	1.61	1.55	1.67

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

^aGini coefficient of family per capita income calculated in the distribution of people

^bGini coefficient of equivalent income (OECD scale for normalization of household size) calculated in the distribution of people

furthering this analysis, Table 9.2 examines how much the inequality or equality processes have converged or diverged in the countries from each region and between regions (measured using the coefficient of variation of the Gini of each country in each period).

In this regard, although these data confirm that observed in Fig. 9.1, the convergence process presents degrees of divergence. While in recent years the region of Latin America has registered a reduction process in the average inequality, the inequality between countries does not appear to have undergone considerable changes. On the contrary, in Europe, the slight increase in the Gini coefficient after the recession in 2009 occurred alongside a decline in the internal inequality between countries. As a whole, there is evidence in favour of convergence: a reduction both in the average Gini and in the coefficient of variation.

The evolution of the Gini coefficients in Latin America and in Europe illustrates the different institutional and distributive networks that characterise these countries. Statistical information reveals that in Europe coming through the “Great Recession” entailed a moderate increase in the Gini; while in Latin America, in the same period, the coefficient reduced. We can speculate that the validity of more robust institutions in Europe guarantees a certain distribution pattern, with some flexibility. This does not occur in Latin America, although what could happen is that a certain institutional configuration (in particular, in terms of pension cover and conditional cash transfers) has been reached with the *commodities boom*, explaining a certain level of convergence.

The income distribution in each country is the result of the complex interaction of innumerable economic, demographic, social and institutional factors. As was mentioned in the introduction, inequality in the income distribution between the population on a global level or in a region reflects the combined effect of inequality

in countries and the inequality between countries. From this perspective, the simplified description of the behaviour of global inequality during the last one hundred years shows that first there was a period in which the inequality in countries reduced, but the gap between countries increased. More recently, and as can be observed in the data, the trend has changed—at least for countries in Latin America and Europe—: the inequality in the income distribution is tending to increase in some societies and to decrease in others, reducing the gap between the countries from each region and between the regions.

A problem widely explored by development literature is the relationship between welfare indicators and economic inequality. Based on the theory of social welfare, an improvement in the income of households or individuals could be considered as evidence that the functioning of the economy generated improved material living conditions for the country's population. Therefore, income could be used as a proxy measure of welfare. In turn, an improvement in the indicators of distribution, which can be measured using the Gini coefficient as a reduction of same, would indicate less inequality in consumption opportunities, bringing greater “profit” to individuals.¹⁰

In any case, considering the magnitude of the interregional differences, it is evident that Europe and Latin America present different development models, welfare regimes and social income. But while the topic is on the international agenda, the empirical evidence is not conclusive as regards the direction and the force taking place in these dimensions. In any case, a welfare and equity optimum is an expected development goal in the majority of societies in the world, although it is not very legitimate to deduce causality from these relations.¹¹ In this context, it seems interesting to study the relation between inequality and the underlying socioeconomic-institutional processes for the countries being studied.

In this regard, below, the average Gini coefficient is empirically related with economic development (GDP per capita) and social welfare (absolute poverty rate) indicators. If the relation between Gini and the GDP per capita is analysed, countries in Latin America have relatively higher Gini indices (greater inequality) and low GDP per capita. As regards the poverty rate, European countries (with lower

¹⁰In addition to the impact of inequality on growth and poverty, inequality has a direct and negative impact on social welfare. According to the psychological relative privation theory (Yitzhaki 1979), individuals and households do not assess their welfare levels only in absolute terms of consumption or income, but also in relative terms. Therefore, for any given income level in a country, and considering that individuals and households compare themselves, inequality has a negative effect on welfare. Income distribution measures, such as the Gini coefficient, are also being analysed because inequality in income before tax can lead to a high demand for redistributive policies (Romer 1975) and, therefore, higher social expenditure (Meltzer and Richard 1983; Shelton 2007).

¹¹In statistical terms, the correlation between variables does not automatically mean that the change in one variable is the cause for change in the values of the other variable; in other words, that there is a causal relationship between the two events.

Gini) are also less poor. Firstly, Tables 9.3, 9.4 and 9.5 below show the way in which these aspects are related as a whole for the countries making up the regions being studied.

Upon performing an in-depth analysis of the correlations of Gini with the above-mentioned variables for all the countries considered, we find expected results: more unequal countries have greater poverty and a lower GDP per capita. In other words, a lower inequality per income, measured using the Gini, is positively correlated with the general socioeconomic welfare, at least for the average of the countries considered in this study during the 2000–2017 period.

However, a relevant fact is that this relation is not as pronounced when the analysis is segmented according to regions. In fact, upon recalculating the Pearson correlations for each region separately, the strength of the relation between the welfare variables and the Gini decreases considerably (Poverty-Gini and GDP-Gini), although it continues to be significant. This change reveals the existence of a third factor associated with the Gini, which must be associated with the political-economic conditions of the national systems making up each region.

These differences in the correlations between regions can also be observed in the following Figs. 9.2, 9.3, and 9.4, in which for each of the abovementioned correlations, the point clouds describe the differences between regions. In this respect, while areas of superimposition can be observed, it is clear that there are two sets of countries, with dissimilar degrees of inequality associated with welfare between regions, and relatively similar degrees of inequality within each region.

9.4 Relation Between Inequality and the Primary and Secondary Sources of Income Distribution

This decline in the relation between welfare indicators and the Gini coefficient when analysed per region, regardless of the historical period being considered, again reveals the structural differences between the compared regions. This fact drives us to reflect on the underlying distributive processes associated with the performance of inequality. On the one hand, to examine the distributive role of social public expenditure as a percentage of the GDP and, on the other hand, the role of

Table 9.3 Pearson correlations for Latin America and Europe (Years 2000–2017)

	Gini	Poverty	GDP pc
Gini	1		
Poverty	0.863***	1	
GDP pc	−0.832***	−0.833***	1

Note: significance of the effects * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

Table 9.4 Pearson correlations for Latin American countries (Años 2000–2017)

	Gini	Poverty	GDP pc
Gini	1		
Poverty	0.550***	1	
GDP pc	-0.468***	-0.748***	1

Note: significance of the effects: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

Table 9.5 Pearson correlations for European countries (Years 2000–2017)

	Gini	Poverty	GDP pc
Gini	1		
Poverty	0.509***	1	
GDP pc	-0.473***	-0.632***	1

Note: significance of the effects: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

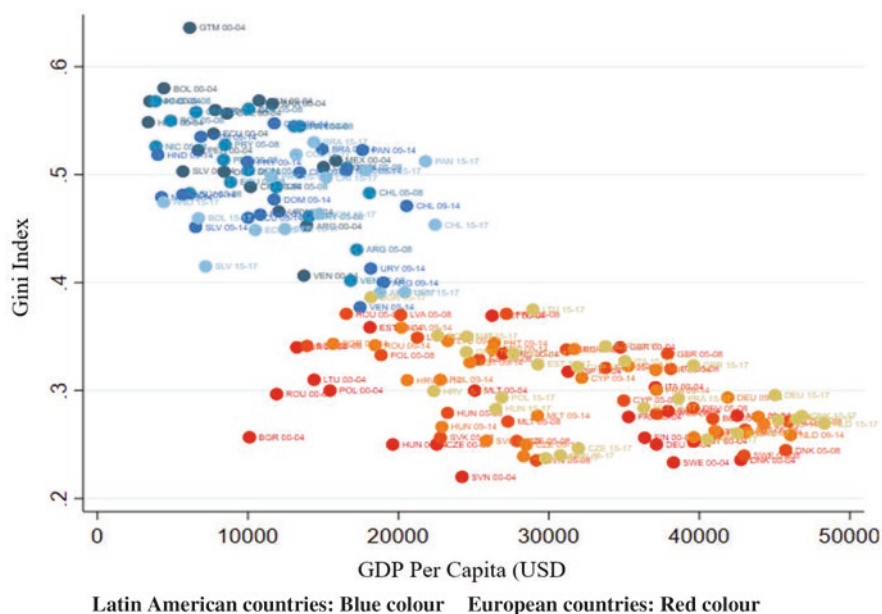


Fig. 9.2 Gini Index and GDP per capita correlation. Latin American and European countries (Years 2000–2017). Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

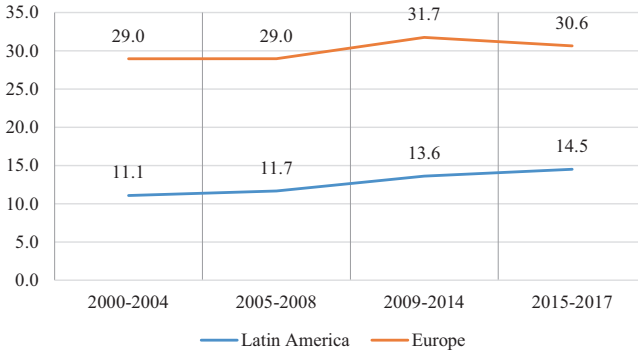


Fig. 9.5 Evolution of social public expenditure of different levels of government [Based on the OECD Classification of Government Functions (COFOG)]. Latin America and Europe (Years 2000–2017). As a percentage of GDP. Source: own elaboration based on EUROSTAT and CEPALSTAT

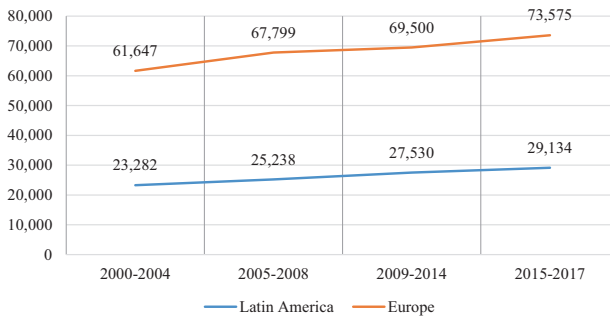


Fig. 9.6 Evolution of the average productivity per worker. Latin America and Europe (Years 2000–2017). In USD PPA 2011. Source: own elaboration based on World Bank

labour productivity as an annual average of the contribution of each worker to the added value in dollars (PPP). In this regard, the labour productivity can be interpreted as a proxy of the value of the salary/remuneration.¹²

The comparative evolution of both indicators is presented in Figs. 9.5 and 9.6. The graphs once again show the structural inequalities in the average of the countries from both regions. Although there is an upward trend for both social expenditure and average productivity, and unlike the inequality in the Gini index, the gaps continue over time, without showing any convergence. In other words, the increases in productivity in Europe did not result in better welfare or greater equality; on the

¹²The labour productivity variable used here shows the total volume of production (GDP) produced by one labour unit (number of persons employed) during a specific time period. This indicator of productive capacities provides general information about the efficiency and quality of the capital—both physical and human—in the productive process for a given economic and social context. See: http://www.ilo.org/ilostat-files/Documents/description_PRODY_SP.pdf

Table 9.6 Pearson correlations for Latin America and Europe (Years 2000–2017)

	Gini	Productivity	Social spending
Gini	1		
Productivity	−0.811***	1	
Social spending	−0.827***	0.842***	1

Note: significance of the effects: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

Table 9.7 Pearson correlations for Latin American countries. Years 2000–2017

	Gini	Productivity	Social spending
Gini	1		
Productivity	−0.475***	1	
Social spending	−0.192	0.344**	1

Note: significance of the effects: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

Table 9.8 Pearson correlations for European countries (Years 2000–2017)

	Gini	Productivity	Social spending
Gini	1		
Productivity	−0.402***	1	
Social spending	−0.517***	0.756***	1

Note: significance of the effects: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

contrary, there was a moderate relative loss in social welfare. During the last period a decline was recorded in the participation of social expenditure. On the contrary, Latin America registered a constant increase both of productivity and social expenditure, which would have a positive effect both on welfare and equity.

Likewise, although the differences between regions persist, the behaviour of both indicators shows certain divergences. In particular, social public expenditure grew by 31% in Latin America, while in Europe it grew by 5%. As regards the average productivity, the growth was also higher in Latin America (25% compared to 19% in Europe). In other words, for Europe, the improvement in productivity was not accompanied by an increase of the same magnitude, or similar, in social expenditure. In this regard, the dynamic observed in the 2000–2017 period is consistent with the previous hypothesis about the institutional rigidity that reinsures certain inequality patterns. In this context, it is important to reflect on the direction and strength of the correlation existing on a national level between the percentage of social expenditure in GDP and the labour productivity in dollars (PPP 2011) in Tables 9.6, 9.7, and 9.8.

Table 9.9 Partial correlations for Latin American and European countries, controlling by region (Years 2000–2017)

	Gini	Productivity	Social spending
Gini	1		
Productivity	−0.399***	1	
Social spending	−0.342***	0.572***	1

Note: significance of the effects: * $p < 0.05$, ** $p < 0.01$, *** $p < 0.001$

Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

A distinctive trait of the European continent is that a significant (and positive) relationship can be observed between social expenditure and Gini. Therefore, the higher the social expenditure, the lower the inequality in Europe, while in Latin America this relationship dissolves and is not significant. In all cases, whether aggregate or broken down into regions, the relationship between social expenditure and average productivity is positive and significant, although this relationship is more pronounced in Europe than in Latin America.

An analysis of partial correlations (Table 9.9) regarding these same variables, when controlling for region, confirms the results.¹³ Based on this methodology, the negative relations between the Gini coefficient and labour productivity and social expenditure are maintained. The relations between the last two variables, productivity per worker and social expenditure, is positive; strengthening the hypothesis that an increase in average productivity affects countries' capacity to generate surpluses devoted to social expenditure. It is important to observe that, when controlling per region, the correlation is less in terms of magnitude than when taking the total sample of countries (Figs. 9.7, 9.8, and 9.9).

9.5 Factorial and Temporal Breakdown of Inequality

The main theory of this work is that, in socioeconomic contexts with different degrees of economic development, primary income distribution is a key factor to explain both welfare levels and income distribution, even in the presence of robust social security systems responsible for guaranteeing a minimum basic income (ILO 2012, 2013, 2014). Although these systems can have a considerable redistributive impact, this depends on their degree of maturity (sustainability), coverage and transfer capacity, which is ultimately also a function of the productive development and the primary income distribution of each country (Moreno 2012, 2015). In any case, it is important to accept that there are important structural and institutional

¹³ Instead of calculating the correlations separately, one correlation is calculated for each pair of variables, controlling for a possible "continental effect".

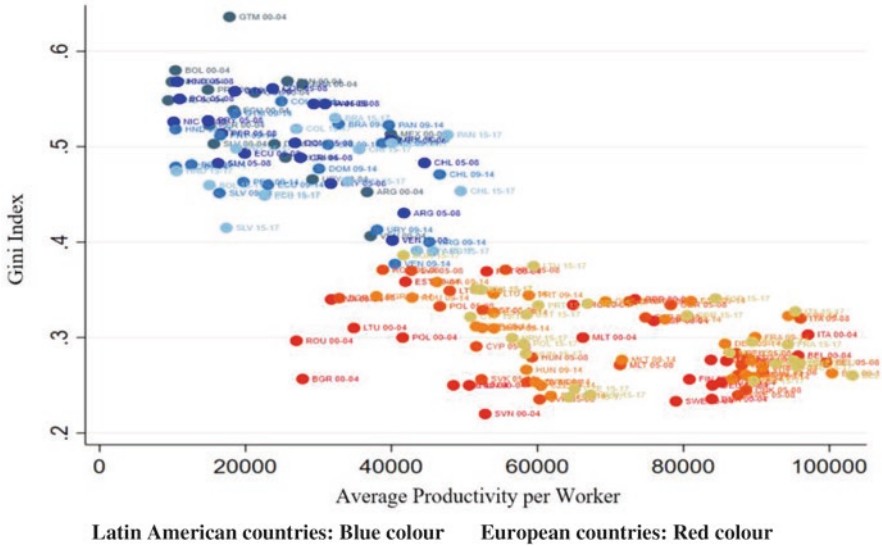


Fig. 9.7 Gini Index and Average Productivity per Worker correlation. Latin American and European countries (Years 2000–2017). Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

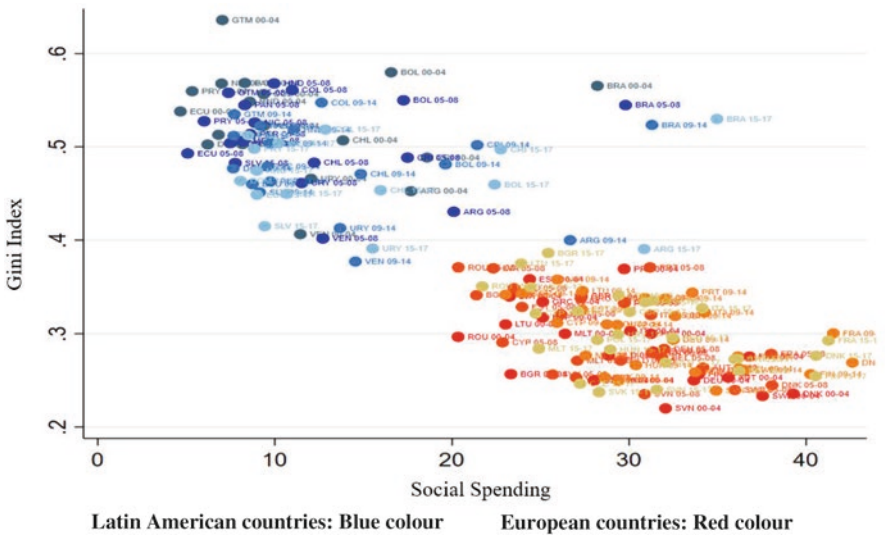


Fig. 9.8 Gini Index and Social Spending correlation. Latin American and European countries (Years 2000–2017). Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

heterogeneities between the countries from both regions, both in productive material and in social welfare systems. Nevertheless, both the backgrounds and the evidence gathered to date show that the regions have their own political-institutional weight, in other words, the differences between regions prevail over the differences between countries from one same region.

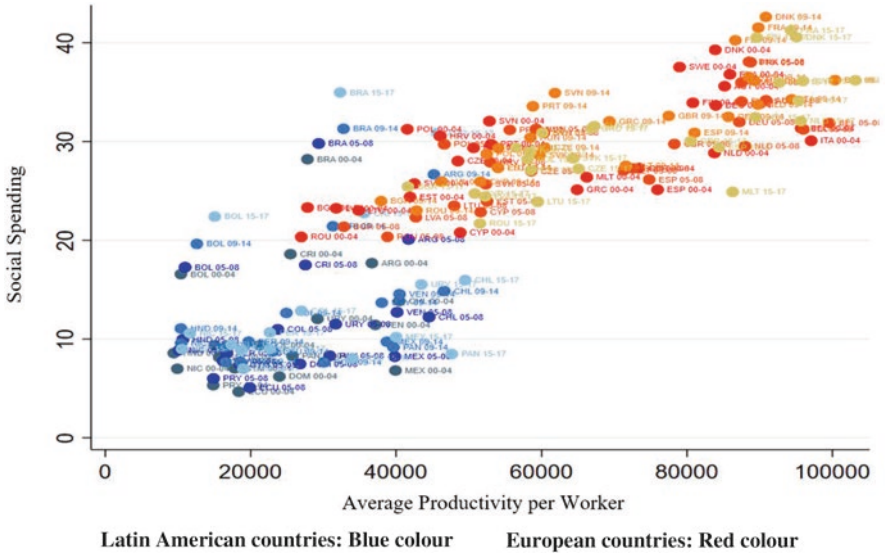


Fig. 9.9 Social Expenditure and Average Productivity per Worker. Latin American and European countries (Years 2000–2017). Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

With a view to examining this theory on a comparative level, using the data available for the countries from Europe and Latin American analysed in the previous sections, a factorial model is adjusted with the three variables considered in the previous section: (1) inequality in income distribution (Gini index), (2) labour productivity (added value per worker), and (3) social expenditure (% of the social expenditure in the total national GDP). As has been done thus far, the analysis units are the periods-nations corresponding to 44 countries, 26 from Europe and 18 from Latin America, with the years being grouped into four time periods: 2000–2004, 2005–2008, 2009–2014 and 2015–2017.

To summarise and structure the totality of this information a factorial analysis of principal components was applied in order to obtain the most important patterns of differentiation of the countries-periods. This procedure helped to identify two underlying factors dominating the processes of economic (in)equality between the regions being examined. Both components, associated with inequality, but in inverse ways, explain almost 95% of the total variance. On the one hand, the vector “*development with equity*” (horizontal axis) organises the countries according to their level of economic development and its implications on inequality: countries situated more to the right are simultaneously more developed and egalitarian; while those situated more to the left are less developed and more unequal. On the other hand, the vector “*secondary redistribution—inequity*” (vertical axis) organises the countries according to the compensatory efficiency of their social expenditure on inequality: the countries situated lower down have a more efficient relationship between social expenditure and equity than those higher up, for which higher social expenditure does not help to reduce inequality.

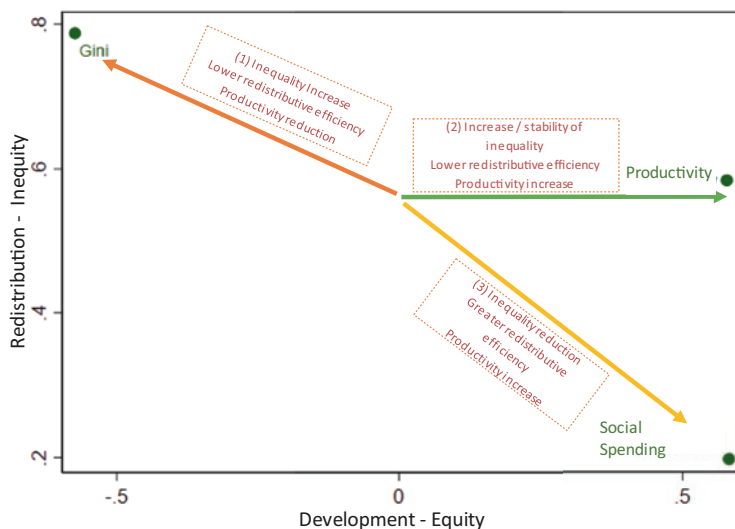


Fig. 9.10 Principal component analysis: Identified components and types of trajectories for countries in Latin America and Europe (Years 2000–2017). Source: own elaboration based on World Bank, EUROSTAT and CEPALSTAT for sample of selected countries

By relating both factors, different “national inequality regimes” (Boyer 2014) can be identified, both in Europe and in Latin America, and their main movements over time can be described. In fact, following this theoretical-methodological model, the factorial position of the variables considered can be classified, as well as that of the countries-periods considered in the analysis.

Figure 9.10 shows the position in the factorial space of the variables considered, helping to identify different possible trajectory types. In particular, three main types can be observed: (1) reduction in inequality due to a greater redistributive efficiency of the social expenditure and a distributive improvement in the primary income resulting from an increase in labour productivity; (2) stability or increase in inequality with an increase in productivity but with a loss in the redistributive efficiency of the social expenditure; (3) increase in inequality as a result of the worsening of the primary distribution due to a decline in labour productivity, as well as an inefficient increase in social expenditure. Naturally, the slope of the trajectory will depend on the relative importance of the processes identified.

In turn, Fig. 9.11 distributes the countries-periods around the identified axes and helps to examine, firstly, how the cases are distributed across the quadrants demarcated by the mentioned axes; and, secondly, what trajectory the countries followed for the periods considered. The axes describe four situations or types: (1) the *upper left quadrant* brings together countries with low economic development, high inequity and low redistributive efficiency of the social expenditure; (2) the *lower right quadrant*, countries with high economic development, low inequality and redistributive efficiency of the social expenditure; (3) the *lower left quadrant*, countries with low economic development, high inequality and compensatory redistributive

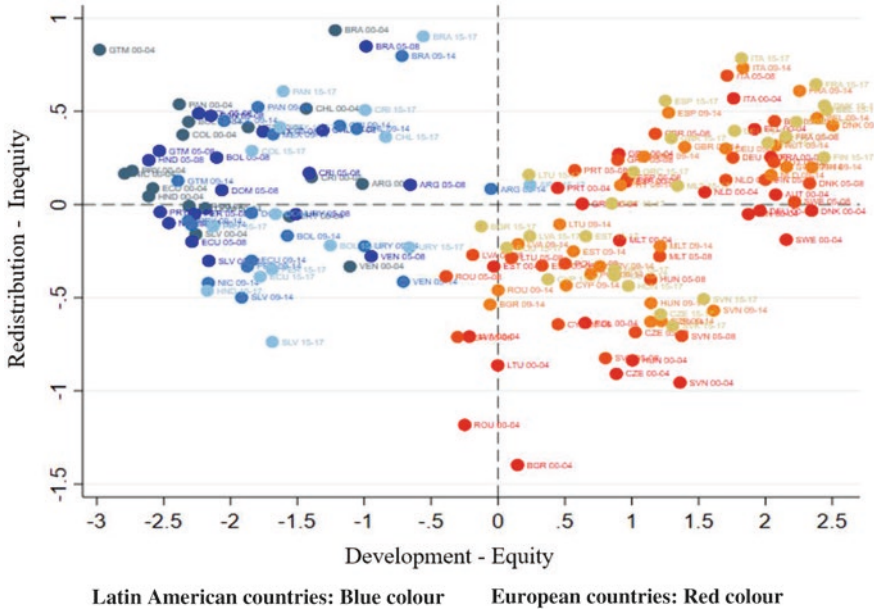


Fig. 9.11 Principal Component Analysis: Scores for Latin American and European countries (Years 2000–2017). Sources: Own elaboration based on EUROSTAT and CEPALSTAT, Average productivity per worker: own elaboration based on ILOSTAT and World Bank, Social public expenditure of different levels of government: own elaboration based on EUROSTAT, CEPALSTAT and National statistics

efficiency through social expenditure; and (4) the *upper right quadrant*, countries with high economic development, moderate inequality and less redistributive efficiency through social expenditure.

Based on this matrix, it is easy to observe that, regardless of the possible movements that took place during the 2000–2017 period, while the countries-periods of Latin America are essentially concentrated in the left quadrants (lower development with greater distributive inequity), European countries are mainly located in the right quadrants (greater development with lower distributive inequity). Likewise, the countries-periods from both regions are divided relatively clearly between the upper and lower quadrants of the graph according to the effectiveness of social expenditure as a factor associated with lower or higher inequality (greater relative inequality with higher social expenditure compared to lower relative inequality with lower social expenditure). This classification includes a series of European countries-periods that are notable for their lower degree of relative development but high compensatory efficiency through social expenditure (Bulgaria, Romania, Lithuania), which however seem to move upwards. At the other extreme, there is a notable presence of a series of Latin American countries-periods—essentially Brazil—with greater relative productive development, but with a high social expenditure that is considerably inefficient at reducing inequality. In this case, there is a slight positive movement towards greater development with equity.

Precisely, in terms of trajectories, as it is a factorial space, it is more relevant to examine the direction of the trajectories than the distances travelled, even when these can provide additional information. Furthermore, as can be observed, although countries in Latin America and Europe took three dissimilar five-year-long trajectories, which explains the distributive convergence observed in Table 9.3, these were not sufficient to alter their structural distribution in the previously identified quadrants.

A first intuitive examination of the trajectories confirms that, beyond particular situations, the majority of the European countries registered a type (2) trajectory (Graph 10): increase or stability (depending on the slope) of inequality, with an increase in productivity and lower redistributive efficiency of social expenditure. In this respect, we can speculate that the effects of the Great European Recession and the type of recovery that took place left a specific mark on distributive inequity. Simultaneously, the austerity policies implemented resulted in the loss of the redistributive efficiency of social expenditure; a historical process that fits quite well with what is known as the “Bronze Age” of the European welfare regime (Moreno 2015, 2016).

On the contrary, Latin American countries followed a different trajectory. This trajectory corresponds with type (1) (Fig. 9.10): reduction of inequality with an increase in productivity and greater redistributive efficiency of social expenditure. Once again, the slope of the trajectory provides an idea of the achievements in terms of reducing inequality. The growth model aimed at the internal and expansive social policies market (often, linked with old age pension benefits and conditional cash transfers), during the boom of the prices of commodities, would explain the type of trajectory observed (CEPAL 2014).

Based on the results obtained with this analysis model, in addition to confirming that intra-regional inequalities continue to prevail, the weak convergence process that took place in income distribution during the first three lustrums of the twenty-first century can be understood in terms of the particular primary income distribution and secondary income distribution processes that took place almost unanimously in the countries from each region. This can be observed in the distribution of the countries-periods in the factorial axes according to the region to which they belong. In other words, the expanded analysis reveals that the convergent trends in inequality are the result of a series of divergent processes linked to productive development and the different models of social policy implemented.

9.6 Conclusions

During the last quarter of the twentieth century and the current twenty-first century, both Europe and Latin America have undergone profound transformations in their social welfare and income distribution structures in the context of the changes that have taken place as a result of international political-economic conditions (globalisation), with different scope and impact depending on the way in which each society

absorbed, regulated and processed said trends. The current global context represents a period of exhaustion, transition and redefinition of these processes. The impact of these changes on the social reproduction patterns of economic inequalities, both in direction and in magnitude, has not been sufficiently explored by social science literature. While there are studies of national cases, and, even, analyses based on comparisons between countries from one same region, analyses comparing the degrees of inequality of both regions are particularly scarce.

In this context, a comparative analysis of countries from Europe and Latin America is conducted to assess changes in economic inequality during the first lustums of the twenty-first century. This study initially examines how equal-unequal the national-regional systems taken as case studies are in terms of their degree of socioeconomic-productive development, economic inequalities and their effects on poverty. Secondly, assuming the presence of unequal degrees of welfare-inequity between regions-countries, how can these different levels of welfare, economic inequality and social development between Latin America and Europe be explained? What are the main distributive processes explaining the changes that have taken place in recent decades?

To answer the first question, we described the inequality in the distribution of national income between and in the regions considered, as well as their recent changes over time, based on a model linking the Gini coefficients of each country, in four different stages from the 2000–2017 period, with the productive capacities of each economy (primary income distribution) and the redistributive efforts made by the governments through social expenditure (secondary income distribution). Based on this model, and following a comparative analysis between countries-periods for Europe and Latin America, we sought to determine a structuring descriptive pattern of the different ways in which both regions and the national systems manage the distributive inequalities, as well as their movements over time during the study period.

With this framework, firstly, the relationship between inequality and welfare was explored, analysing the differences between regions. Upon controlling for region, the decline in the relation between the welfare indicators and the Gini coefficient of the countries provides evidence of the structural differences between regions, beyond the correlations and differences assumed to be present on an intra-regional level. In accordance with the available evidence, in the last two decades of the twenty-first century, Europe and Latin America have reduced their economic inequality gaps, but while the distributive inequality has reduced in the majority of Latin American countries, an inverse process, although moderate, and varying depending on the country, was happening in the majority of countries in Europe. Although there were exceptions to both trends, as well as different national behaviours within each region, the analysed evidence confirms these processes, revealing the factors underlying these behaviours. In both cases, although with similar trends, intra-regional inequality appears to have increased.

The decline observed in the correlation between GDP per capita and Gini index in both regions drove the analysis of the role played by two factors more directly associated with the behaviour of inequality: the distributive role of social

expenditure as a percentage of the GDP, and the average labour productivity. The analysis of the relation between social expenditure and Gini shows that, the higher the social expenditure, the lower the inequality in Europe; while in Latin America this relationship dissolves and is not significant. The relation between productivity and social expenditure is positive and significant, in both cases, although this relation is more pronounced in Europe than in Latin America.

The model applied was used to analyse how the productive development capacities and the levels of secondary income distribution covered by the state intervene in the social reproduction of inequalities, in different ways across the continents.

As regards the second topic proposed, a particularly relevant goal was to assess how and in what way the different paths taken, beyond the results attained, can be explained by more structural factors affecting each region-country: the productivity of the capital-work relation (in terms of structural heterogeneity, institutional regulation models and ways in which these factors segment the labour demand), and the weight of social expenditure in the gross domestic product (as an expression of the level of coverage and redistribution of income provided by social policies).

In response to this second goal, a factorial-qualifying analysis was conducted of the different economic inequality systems that characterise each national system. Considering a series of indicators regarding average labour productivity, the level of social expenditure and its effects on welfare for each country, we managed to demonstrate a conceptual bridge that explains the distributive inequality of the income between both regions.¹⁴ Assuming the presence of unequal degrees of welfare-inequity between the regions being studied, the analysis showed the main processes of the changes that took place in economic inequality in recent decades in the countries making up both systems.

Based on the three variables considered (Gini coefficient, labour productivity and social expenditure), two specific components were identified for the analysis: “Redistribution and Inequity” and “Development and Equity”. In general, countries from Latin America developed around the axis “Development and Equity”, with certain levels of redistribution. While Europe, located in the position Development-Equity, made movements in the period analysed around the axis “Redistribution and Inequity”. Some saw their social rights diminish while others saw them improve. Lastly, although this work provides evidence about the reduction in economic inequality between the regions, it also reveals the existence of structural factors that would explain intra-regional distributive inequalities that continue to be important. Beyond the changes that have taken place in each region during the twenty-first century, the inter-regional dynamics are not convergent in terms of productive development and equity and efficiency of social expenditure.

¹⁴The analysis of these matters, from a perspective of the factors associated with income distribution, leads us to consider a methodological strategy of comparative analysis between countries, which opens up the possibility of developing theoretical formulations that transcend the borders of a society (Holt and Turner 1970). These analyses provide relevant conclusions to progress in this line of research in international comparison.

Although the changes that took place within each region during the twenty-first century reduced the differences between the two continents, the interregional dynamics in terms of productive development and efficiency of social spending—key to their relationship in both cases with the inequality in the distribution of social revenue—they moved in a divergent sense.

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Part IV
Life Trajectories and Gender Inequality

Chapter 10

Theoretical-Methodological Elements for Comparative Analysis of Social Inequalities in Life Courses



Leticia Muñiz and Joan Miquel Verd

Abstract Social inequalities are one of the structural problem areas of Western capitalist societies, and are of particular relevance both in Europe and in Latin America. Sociological studies on the issue account for the complexity of the phenomenon by presenting their constitution and consolidation based on the analysis of institutional and subjective aspects, which include the particularities, on the one hand, of the socio-economic systems of countries and regions; and, on the other hand, the representations, dispositions and actions deployed by individuals in order to deal with and live in an unequal world.

This chapter forms part of these discussions on social inequalities by developing a theoretical-methodological analysis that helps to generate critical views of the phenomenon in a context in which there is a need to design public policies that will foster equality. In particular, social inequalities are studied from the perspective of life courses, which involves multidimensional analyses over time; and a theoretical-methodological model that deepens our current knowledge of the Comparative Biographical Perspective is developed. In order to show how this approach can be used empirically, we then present an analysis of the career paths of workers with different levels of education in Argentina and Spain.

Keywords Life course · Social inequalities · Spain · Argentina · Comparative biographical perspective · Theoretical-methodological model

L. Muñiz (✉)

Instituto de Investigaciones en Humanidades y Ciencias Sociales, Universidad Nacional de La Plata,
La Plata, Argentina

e-mail: lmunizterra@conicet.gov.ar

J. M. Verd

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain

e-mail: JoanMiquel.Verd@uab.cat

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10.1 The Longitudinal Dimension of Social Inequalities

10.1.1 *Study of Inequalities: Between Structure and Social Action*

The study of inequalities as a social phenomenon has its origin in the fall of the Ancient Regime and in the advent and expansion of the capitalist system. Since then, widespread debates in the social sciences have been generated around the ideas of equality and freedom, which emerged as central components of the new social order. The controversies that arose around them were associated from the 19th and 20th centuries with discussions sparked by liberal and radical ideological currents around freedom and equality. While liberal movements have sought to defend individual freedom to foster subjects with individual rights in society, the critical movement, and more directly Marxism, has conferred greater weight upon equality with the intention of fostering the collective distribution of the social product.

With the passage of time, this theoretical debate faded, and to a large extent failed to solve the most fundamental issues. It was not until the 1970s that the concern for social equality and its opposite number, inequality, was revitalised as the complexity of the problem became apparent and empirical studies revealed the emergence of new forms of social inequality in industrialised countries and the impossibility of achieving absolute equality in socialist ones. Hence, the core issues in the social sciences were oriented both towards analysis of the historical and social conditions required to form a more just society, and towards studies of the constant growth of social inequality and the possibilities of reducing it. It was in that context that theorisations emerged regarding the intrinsic characteristics of equality/inequality, leading to views focused on individuals, relationships and macrosocial contexts.

The perspectives that emphasised individual experiences stressed the unequal distribution of capacities and resources among individuals and in some cases called for meritocracy and equal opportunities as a way to combat inequality in a competitive context (Rawls 1997). Interactionist views, on the other hand, noted that inequality is reproduced within the framework of social relations, where individual capacities and potentialities translate into power struggles. They were especially concerned with the study of the social links that generate inequalities, which can refer either to the interactions between different actors that impose heavy restrictions (Goffman 1981), or to distinctively confined categorical pairs such as woman/man, citizen/foreigners, aristocrat/commoner, etc., that can persist throughout a career, life or organisational history (Tilly 2000). They therefore focused mainly on analysing the relationships between unequal inter-institutional exchanges and actors, for it is these that engender chains of dependence, methods for exploitation, resource grabbing, exclusion processes and other forms of power relations that cause the flow of wealth from certain groups to others.

Finally, studies focused on structural conditioning focused on the structures that unequally distribute the benefits and burdens among the different sectors and individuals that make up a society. They assume that economic and social structure cause individuals to be placed in different parts of society and that the macro-context fundamentally explains the existence of social inequality (Bárcena and Prado 2010). This view then increases the weight of those economic, political, social and cultural conditions that cannot be modified through mere human agency and in the short term, and that go on to form the persistent inequalities and asymmetric positions that are imposed upon the affected groups.

From the previous paragraphs, it is evident that each of the analyses and theorisations on inequality that we have mentioned focused on different aspects and dimensions of the phenomenon, engendering explicit or implicit debates on freedom and equality, and shedding light on some particular aspects of the phenomenon of inequality, without proposing a holistic view of the problem. To tackle this analytical fragmentation, some more recent studies have proposed the recovery of the multidimensionality of social inequality (Therbon 2006; Wilkinson and Pickett 2009; Savage 2014; Reygadas 2004). Although these perspectives come from different theoretical positions, it is interesting to note that they all propose an analysis oriented towards analytical integration that can address, though not necessarily resolve, the existing tension in sociological studies between social action and structure. They therefore propose an integrated vision to foster coordination/tension between macro-structural conditioning (macro social scale), institutional policies and relations (mesosocial scale) and the actions of individuals (microsocial scale). Each of these scales is composed of different dimensions (education, labour, religion, politics, etc.) that are often interconnected. The way in which the many scales and their dimensions are linked thus gives rise to a specific social inequality. This configuration also offers the particularity of being changeable, for it can be transformed diachronically. The particular coupling of the many scales and dimensions over time and in specific contexts (historical, cultural, etc.) leads to permanent production and reproduction of social inequality.

10.1.2 Life Course Transitions as Excellent Vantage Points for Observing Inequalities and Social Protection Actions

The previous section concludes that an analysis of inequalities requires taking into account the multiple scales and dimensions in which they occur, and particularly the links between the macrosocial, mesosocial and microsocial levels. The biographical perspective offers unrivalled methodological advantages, as it is not too difficult to link aspects that are situated on the macrosocial level (structural processes and conditions and contexts of action) with the mesosocial level (the role of institutions) and the microsocial level (practices, representations, experiences and strategies, if any, of an individual nature).

But the diachronic dimension of inequalities should also be considered, since it is this that can identify the way in which inequalities increase or decrease over time, and also how they are reproduced and transmitted between generations. Here, the biographical approach is intrinsically diachronic, since our lives are, by definition, longitudinal and not cross-sectional. In a context in which biographies are far from being stable, i.e. there are countless situations that produce sudden and unexpected changes in people's lives, the longitudinal perspective is essential. In fact, some concepts used in the last 15 years to explain situations of inequality, such as 'entrapment', 'scarring effect' and 'cumulative disadvantage' are fundamentally longitudinal. However, most analyses of inequality are still conducted with cross-sectional data.

In Western countries, while there is less 'social determinism' in life courses (in the sense that some variables, such as gender or level of education, which in the past had a marked influence on the kind of life someone could expect, are now not such strong determinants of one's path in life) and greater diversification of the life itineraries, it is also becoming increasingly easier for specific events to have a negative impact on them. The study by Vandecasteele (2010) of cumulative disadvantage shows that having a child, a member of the household losing their job, or a couple breaking up have an effect that can trigger poverty situations (the former, fatherhood or motherhood, only in specific cases). These events mark biographical turning points regardless of the classic variables of social structure, although the negative effect is reinforced by the fact of being on the more at-risk side of the social structure. The findings of this research suggest two relevant conclusions in relation to the study of inequality and public policies aimed at eliminating it. On the one hand, it is observed that in the processes of cumulative disadvantage, factors situated at the macro and mesosocial levels are interrelated with the events that take place at the individual level, something that has already been noted in the previous section of this chapter. It thus follows that the analysis of inequality should consider the three levels and employ methodological procedures that allow for an understanding of the relationship between them. The second finding is the dire consequences of the absence of support and resources at specific moments of life courses, which can constitute negative turning points whose impact is prolonged over time if public policies do not adequately compensate for them.

The proposals made by Schmid (1998, 2006) show the importance of taking life transitions into account in the design of social protection policies. His work on Transitional Labour Markets (TLM) is frequently cited as an example of the importance of adopting a longitudinal perspective in the design of public policies, especially as a "guide to the analysis, management and coordination of existing and future labour market policies" (Vielle and Walthery 2003: 81). The author begins by proposing five main types of transition linked to labour markets (see Schmid 1998: 10–11): (1) transitions between short-time work or part-time work and full-time employment, or transitions between dependent work and self-employment; (2) transitions between unemployment and employment; (3) transitions between education or training and employment; (4) transitions between domestic and care work and paid employment; and (5) transitions from employment to retirement. These transitions are not viewed in a single direction, but in both (except perhaps, that between

employment and retirement). The author then presents a series of criteria for assessing the extent to which employment policies and social welfare mechanisms are able to offer instruments that avoid potential situations of biographical risk in people's working lives (2006: 9–19).

The study by Anxo et al. (2010) also highlights the importance of investigating social welfare systems from the perspective of key life transitions. These authors justify their attention to transitions between life stages for three reasons: (1) it provides a lens through which to analyse a range of different interrelated dimensions of social welfare systems, such as the family and employment; while also identifying their effectiveness in relation to different social groups defined, for example, by class, gender, age or generation; (2) it can identify the consequences of the reforms being made to employment and social welfare systems, thus showing who benefits and who loses as a result of said reforms; and (3) it can guide interest in societal and institutional effects on life trajectories through consideration of the plurality of support needs derived from increasingly more variable life courses.

Given the importance acquired by the concept of *transition* for the type of analysis we propose, we adopt the definition given for the *Life Course Perspective* (Elder 1985; Giele and Elder 1998; Mortimer and Shanahan 2004). From this perspective, the concept of transition refers to changes in status that occur in short periods of time throughout a life course. This notion is different from that of a turning point, which implies “a substantial change in the direction of one's life, whether subjective or objective” (Elder, Johnson and Crosnoe 2004: 8). So, not all transitions involve turning points, since the change of status involved in transitions may be far removed a shock or disruption to the life course, which is what characterises turning points. In short, whether a change constitutes a turning point or not largely depends on personal characteristics or resources and on the external support available to that person in order to adapt to the change, as shown above in the studies by Vandecasteele and Schmid. These turning points also “reflect the effective exercise of agency in both creating and responding to new opportunities” (Bynner 2005: 379).

The *Life Course Perspective* is interested in the sequence of events that have marked a life course from an aggregate perspective, taking as the focus of the analysis one or several generations or cohorts. As Runyan (1984: 82) points out, the orientation “puts greater emphasis on the influences of changing social, demographic, and historical conditions upon the collective life course”. This has led researchers who use this perspective to mainly, but not only, work with quantitative data. Case-centred qualitative studies are in the minority compared to variable-centred quantitative studies. However, the fact is that in order to make full use of the given analytical advantages, a qualitative approach must at least partially be adopted.

A qualitative methodological approach can identify those events, transitions and stages that constitute real moments of disruption to life courses. In many cases, these moments can only be defined subjectively, since what for one person might be a turning point, may not be for another. It is at these turning points when the role played by social welfare measures can best be evaluated, whereby the role played by the possible resources provided for correcting or reorienting personal histories can be identified. And secondly, the qualitative approach can also examine the

degree to which life courses are marked by individual decisions or by the influence of structural constraints. It is thus possible to adequately consider the weight that the ‘marks’ of past episodes have on individual life courses, as well as on an individual’s future prospects. Third, the qualitative approach can be used to contemplate social experiences and actions in interaction with the cultural, institutional and even historical context that surrounds individuals, which makes it possible to consider the effects that individual and collective resources have on a life course, and to connect the macro, meso and micro levels in these explanations. Finally, the qualitative approach can also be used to jointly consider the interrelationships between different spheres of life, since the intrinsically holistic and comprehensive nature of qualitative data enables identification of the interactions and connections between these different spheres and contemplation of effects and connections with certain spheres of life that were certainly not contemplated in the initial design of particular measures.

10.2 A Qualitative and Comparative Narrative-Biographical Perspective

10.2.1 *The Narrative-Biographical Approach*

Taking the aforesaid qualitative approach necessarily implies a methodology from the narrative-biographical perspective, which has long been a tradition in sociology (Thomas and Znaniecki 1918). The central methodological basis of this perspective is that of narrative-biographical interviews, also known as *life stories*. In fact, Bertaux (1980: 200) distinguishes, following Denzin, between studies based exclusively on life stories and those in which the story is complemented by information obtained via other sources, such as all kinds of personal documents, interviews with other people, or even quantitative data (life histories). Life stories not only directly collect all aspects related to agency (goals, representations, motivations), but also rich contextual information (Bertaux 1997; Jovchelovitch and Bauer 2000), i.e. what Clandinin and Connelly (1994) call the outward dimension of personal experiences—the conditions of existence, the contexts and events that are ‘outside’ of the subject. As Bertaux (1997) has noted, life stories can also be used to distinguish between causes that are attributed to circumstances that are external to the subject and those that are attributed to goals or desires that can be found within the perpetrator of the action itself. Following Shütz (1987[1971]), Bertaux calls the first type of circumstances ‘because’ causes, and the latter ‘in order to’ causes. These causalities must be passed through the analytical sieve of the researcher, who must assess, precisely using as much contextual information as is available, the margin of freedom that the subjects’ environments offer.

Another advantage of using life stories is the possibility of identifying without too much trouble the moments of biographical disruption or turning points that are

important to individuals. The ideas of crossroads, bifurcations or ‘points of no return’ are constant in biographical narratives. Lahire notes (2002: 30–31, italics from the original) the importance of “drawing out moments of ‘biographical disruption’, changes or amendments, even slight, in trajectories or careers [...] because they are the moments when provisions can be *placed in question* or suddenly *reactivated* when they had previously been *dormant*”. The use of only quantitative data makes it extremely difficult to distinguish between voluntary and involuntary biographical disruptions, and can even be misleading, since transitions can be confused with turning points (Verd and López-Andreu 2011). As argued by Diewald and Mayer (2008), the Life Course Perspective in sociology may too often have considered that trajectories are mostly the result of institutional and structural aspects, whereas individual agency is also a key element in the direction, and changes in direction, of a life course.

A second relevant distinction within the narrative-biographical perspective is the one raised by Rosenthal (2004: 62) between lived life and told life: “the difference between biographical self-presentation at the time of narration and the experience in the past”. This distinction between lived events and those that are narratively reconstructed from the present is of major relevance to research that works solely with data from biographical interviews. Bertaux (1997) and Thompson (2004) call themselves ‘realists’, to emphasise how they are fundamentally interested in lived events, understood as those facts and situations that form the basis of the story. In these cases, the relevance of the story is defended as a means of access to the ‘goal’ reality beyond the narrator, such that despite the mediation involved in the account of a biography, it is always “possible to reconstruct the *diachronic structure of situations and events* that have marked this path” (Bertaux 1997: 37; italics from the original). From this ‘realist’ perspective, the approach adopted by Bertaux (1997) and Thompson (2004) is mainly inductive in nature, while the one adopted in Life Course studies (Elder) is more deductive. This more deductive view is what allows the analysis to be directed towards certain aspects and specific moments of a life story. In the examples in sect. 10.3, this view is partially adopted since we will focus on those elements that influence the development of unequal life and career paths, and on the effects that policies and institutional welfare and training mechanisms have on them.

10.2.2 Case Studies as a Strategy for the Analysis of Comparative Life Stories

Case studies are viewed in the social sciences as one of the methodological strategies for the analysis and study of comparative phenomena. Most comparative qualitative studies follow the methodological guidelines of case studies, which have been extended in recent years to various countries and a wide variety of fields (Yin 2014, 1995; Ragin and Becker 1992; Stake 2005; Passeron and Revel 2005; Gerring 2007).

However, as Piovani et al. (2011) argue, there is ambiguity as to what should be regarded as a case study resulting from disagreements (and even contradictions) in relation to their name, their usefulness for quantitative and qualitative methods and their theoretical basis. These differences became apparent when doing empirical research, and two moments can be defined, differentiated by the theoretical and argumentative treatment by different authors on this research perspective. The first relates to the insertion and validation phase of this type of research within qualitative approaches, a stream that includes the studies by Yin (1995, 2014), Eisenhardt (1989) and Stake (1994, 1999), who conducted their research from the late 1980s until the mid-1990s. Among the limitations of this first moment, there are debates on the ‘generalisation’ problem and its theoretical scope (Giménez 2012). The second moment is characterised by a review and extension of the concepts and methodological implications that such studies entail for social research, especially when they are assumed as a strategy for comparative studies.

In particular, the distinction between single and comparative case studies is retrieved here (Yin 2014). While single case studies focus on the uniqueness of the studied unit, due to its particular, crucial, exemplary (typical or extreme) or revealing nature, in comparative case studies, different units are chosen in order to obtain a broader view of the concept and boost the analytical representativeness of the study. Yin’s (2014: 57) own distinction between the comparison of cases aimed at literal replication and those aimed at theoretical replication is enlightening. In literal replication, cases are chosen in the expectation of obtaining similar results, since it is felt that they represent different cases of the same phenomenon; on the other hand, in theoretical replication, cases are chosen in the expectation of obtaining different results since some of the key characteristics of the phenomenon differ between them. This logic has points of contact with experimental design (Yin 2014: 57), in which the values of certain variables remain fixed, to check the causal effect of the variables whose values differ between the chosen cases.

The relevance of single or comparative case studies is linked to the possibility that this methodological strategy offers for biographical comparison. In fact, Breckner (2007) has noted that the biographical approach can be seen as a type of research with a design similar to that of case studies, in that their case-oriented logic contrasts with the variable-oriented logic that is so typical of quantitative studies. From this point of view, the goal of comparing cases “is to reconstruct from the complexity of empirical processes patterns which can be theorised as ‘general’ concerning their relevance in a specific social field” (Breckner 2007: 115). Following this qualitative logic, and unlike quantitative studies, the relevance of the patterns found does not depend on their distribution or numerical frequency, but on their potential to identify the structuring impact of certain circumstances or actions in specific contexts (Breckner 2007).

The comparative biographical perspective (Muñiz Terra and Rubilar 2018) also highlights the importance of deepening the knowledge obtained from the application of the analytical logic of case studies. According to this strategy, the comparative approach focuses on revealing, interpreting and comparing the elements analysed in a single case or in comparative cases that could be called biographical.

Similarities and differences should be identified between these cases, which should be built on the basis of common research problems, i.e. based on a comparative research problem, biographical case studies that are similar or different in relation to that problem can be delimited.

Likewise, and in line with Przeworsky and Teune (1970), classic authors on quantitative comparative methods, the comparative biographical perspective maintains that it is possible to theoretically understand society if, in addition to noting that social phenomena are diverse and complex, we consider that they occur in independent and interactive structures and in a location in space and time, which reminds us that social processes analysed across time must also be understood within the framework of the spatial contexts in which biographical case studies take place. The identification of spatial contexts is very important because the elements to be analysed can acquire differences depending on the spatial and contextual characteristics present in the phenomena studied.

Especially considering time and space contexts of biographical studies, in this chapter we recover the holistic case studies proposed by Yin (2014) to conduct an analysis based on the systematic and controlled comparison of transitions linked to the labour market as identified with biographical accounts. Given the wealth of information provided by biographical interviews, our proposal helps to avoid the risk of 'cherry picking'; i.e. it avoids selection during the analysis phase of those events that represent evidence in favour of a certain reading of the data, while those that work against that same reading are ignored. So, the type of systematic comparison being proposed obliges the analyst to consider all the evidence, both for and against a given interpretation of the data. To achieve this, the biography is translated and 'stylised' in the form of comparative tables, which collect each of the transitions and classify them by the main analytical dimensions taken from the theoretical framework (see the tables in the appendices). In this one-by-one comparison of transitions, the limitations and influences taken from macrosocial and mesosocial contexts are considered, as well as individual decisions, goals and constraints that allow or impede a certain course of action, and hence a certain development of the life course.

This systematic and systematised analysis allows a comparative biographical perspective that is controlled and guided by the main analytical dimensions considered, which may be intra-configurative or inter-configurative in nature. The intra-configurative biographical view involves taking a biographical case (i.e. a single case), and the way in which the macro and mesosocial scales are connected/stressed in time in the biography analysed, i.e. the way in which different factors external to the subject condition or propitiate the life history over time and their place in the development of subjective experiences and decisions is studied. The individual's biographical account is thus recovered as a source of fundamental information and the way in which both choices/actions and the consequences of certain structural constraints arise in the biographical narrative are analysed, while also incorporating the researcher's analytical view in relation to the particularities assumed on the macro and mesosocial scales in the configuration of the studied biography.

Meanwhile, inter-configurative biographical analysis implies the development of a comparative case study in which two or more biographies are contrasted, analysing first the way in which the macro and mesosocial scales condition or favour the life stories in each single case, secondly the relevance that subjects' experiences and choices have along the way, and thirdly the particularities assumed by external conditions and actions in the different stages of the compared life paths.

However, if the focus is on transitions and turning points or biographical bifurcations, we need to ask what dimensions are involved in the biographical comparison, and what kind of comparisons can be made. For the present study, the transitions and turning points to be compared are linked to external factors, whether macro or mesosocial, in that they can show how different biographical cases manage the contingency, linking over time advantages or disadvantages that give rise to unequal life paths. This can reveal, on the one hand, if when faced by the unexpected, biographies are resolved by recurring to institutional supports (social welfare measures) or to individual decisions, thus accounting for the strengths and weaknesses of the welfare systems in which the biographies occur and, on the other hand, helps us to apprehend the different effects that a contingent event can have on the life courses of different individuals.

Finally, two interesting issues to highlight are, on the one hand, that more than one unexpected transition or turning point can occur in a life course and, on the other, that the reorientation that they produce in biographies is not necessarily immediately visible. Hence, it is very important to honour the relevance of diachronic aspects in the biographical comparison, since it is only over time that disruptive events and the reorientations that they cause become evident.

10.3 Application of the Theoretical-Methodological Proposal to the Comparison of Career Paths in Argentina and Spain

10.3.1 Brief Presentation of the Research Conducted in Argentina and Spain

For the application of biographical comparison, we recur to two studies of career paths conducted in parallel in Argentina and Spain, and which are used here to develop a comparative perspective that will enrich the debate on social inequality.

Both studies started from a common question focused on understanding how formal and informal workers in both countries build their career paths and what particularities occur on those paths depending on their positions in the social structure. At this point, it should be noted that the biographical interviews were able to combine information constructed during the two studies by delimiting a series of dimensions present in the paths, such as: the stages and states of lived life, transitions and turning points, goals to change jobs, institutional resources and the

employment and welfare systems that were assessed in the collected life stories (see appendices).

For the purposes of the comparative exercise, two different cases were selected from each study to illustrate both the differences and similarities that are apparent in the configuration of career paths as a result of the articulation between the macro, meso and microsocial scales, such as the way in which the chain of advantages and disadvantages and the bifurcating effects that external events are produced, giving rise to a configuration and reconfiguration of particular social inequalities.

10.3.2 Intra-Configurative Biographical Analysis: Presentation of the Case Studies

Retrieving the idea indicated above that the intra-configurative biographical approach involves a single case study to analyse the way in which the macro, meso and microsocial scales are connected/stressed in biographies across time, we present below the selected cases to illustrate our proposed intra-configurative analysis, which was conducted on the basis of the set of comparative tables that are included in the appendices.

10.3.2.1 Case 1: Enrique's Career Path

Enrique is a worker from an industrial region in the province of Buenos Aires, who has been forging a zigzagging career, as he has changed jobs several times. Although his first job working informally for a lubricant company involved no specific knowledge, from his second job, in which he learned how to operate a crane (handling of cranes and heavy vehicles) in a company that replaces pipes, he was able to repeatedly switch jobs, almost always using this skill. Operating a crane thus became central to his career since despite not having an official certificate because he had learned the job informally in the workplace, he was recognised and appreciated by companies because there are not many people who have this manual skill. However, a mechanical technician qualification was a central issue as one is required by the industrial firms for which he worked. In Argentina, this training involves taking and passing basic compulsory primary and secondary education, plus industrial orientation. In other words, it involves successfully getting through 7 years of primary school, 5 years of secondary school and one further year more of industrial apprenticeship (mechanics, electricity, carpentry, etc.).

In his story, Enrique says that he has been changing jobs to “*to get more cash*” and “*thanks to having a trade in my hands*”. So, once he had his mechanical technician certificate and “*crane know-how*” he started out on a career path that involved changing jobs in search of better pay: he worked at the YPF state-owned oil company, then for two industrial services companies and an important local public

shipyard, then went back to the state oil company, a company that he finally left in the wake of its privatisation in the early 1990s. That was when his freedom to change jobs in search of better wages was frustrated, given the critical situation faced by the Argentinian labour market. However, this experience is also viewed as a conditioned choice, since it was he who decided to accept the firm's offer of voluntary redundancy. That subjective decision is especially viewed by Enrique as a "*personal choice*", because although as a union delegate he had protection and could carry on working for two more years, he decided to leave because "*the atmosphere in that company was very draining*" for him and the amount of money offered for taking redundancy was attractive.

Faced with the great financial crisis and the lack of job offers back in the early 1990s, when he left YPF he decided to invest the voluntary redundancy pay in setting up a workshop at home, for which he needed support from his wife (who until then was dedicated exclusively to domestic and care work) in order to make it profitable. He and his partner were self-employed for approximately 4 years, after which they closed the workshop because Enrique was able to return to the Rio Santiago Shipyard as a crane operator, a change that he highly appreciated because he was able to return to formal employment with all the labour rights. That was his current situation at the time of the interview. His wife has since returned to exclusively doing domestic and care work in their home.

The account of the comings and goings in this worker's career path can in turn be viewed in the light of the structural constraints and the times when the events occurred. Although his narrative only slightly touches on the occupational limitations that he experienced as a result of the crisis in Argentina in the 1990s, it is necessary and possible to make an interpretation that includes that context. It can be noted that although the welfare regime in Argentina characterised by a reduction in governmental involvement in the labour market and a neoliberal economic policy had already begun to be applied by the military government between 1976 and 1983, it was during the welfare regime of the 1990s when there was a brutal policy of 'state shrinkage', privatisation of a large number of public companies, liberalisation of the economy, downsizing of government workforces, reduction in collective bargaining, the advent of flexibility and labour reform that greatly restricted workers' rights, etc., a situation that was reflected in the rise of unemployment to two-digit numbers (Varesi 2009).

It was precisely in those years when Enrique was 'invited' to become an informal self-employed worker, while before then he had always had formal jobs in state-owned companies or unstable work in private companies. This latter issue also seems significant, since it reveals the impossibility of receiving an unemployment benefit to minimally guarantee his reproduction and that of his family, and shows that in Argentina labour rights were commonly (although not always) applied to public jobs in contrast to private jobs. Although Enrique managed to get out of self-employment by finding formal work, he got this job in one of the few state firms that managed to maintain its public character in exchange for changing jurisdiction, since it went from being national to provincial.

This worker leaving the oil company can thus be interpreted as a turning point, as it meant a before and after by causing a worker with a trade who had always been able to choose where to work in order to earn good wages to turn into the totally unfamiliar world of unstable work. Finally, his skill as a crane operator and the existence of the local state-owned shipbuilding company meant he could get his career back on track (where he was working in 2009, when he was interviewed) and get out of the subsistence self-employment in which he had taken refuge during the crisis of the 1990s.

10.3.2.2 Case 2: Rubén's Career Path

The story of Rubén, a worker from an industrial region in the province of Buenos Aires, begins early at the age of 14 when he left basic compulsory secondary education (he only took 2 years rather than the mandatory five) due to the need to work to support the family economy. From his first job, his career path was stop-start and always informally in subsistence self-employment, alternating between informal jobs as a drinks distributor, carpenter's assistant, kitchen hand and construction worker, with a short, unstable one-year job on a fixed-term contract as an operator in a company before going on to find formal employment as an agent for state oil company YPF. He worked there for 7 years, always in loading and unloading activities for which very few skills were required, moving up relatively quickly considering the short time he had been an oil worker. The physical work put a strain on his body over these years, and he suffered two accidents at work that caused a reduction in his motor skills.

In the early 1990s, when the state company was privatised, he left the firm by accepting the 'voluntary' redundancy that was offered as part of the downsizing of the YPF staff. He used the money he received to buy a house on the outskirts of the city so he no longer had to pay rent and then started using his limited qualifications to go back to stop-start work, alternating occasional, unstable subsistence self-employment and construction work with long periods of unemployment. His irregular income was compensated by the main earner in the household, his wife, who worked as a domestic employee. Rubén was frustrated by his difficulties finding more stable work as felt he was not fulfilling what he views as his 'duty' as a male breadwinner. He feels he is "*diminished because the one who is keeping the family afloat is my wife*".

Although there are no contextual aspects in his account, it can be imagined that in the chain of disadvantages in Rubén's career path, a series of subjective factors are condensed with a series of structural constraints. Middle school dropout correlated in the late 1970s with early entry (at age 14) into a labour market that, as we noted earlier, was at the primary stages of implementation of a welfare system that encouraged a reduction of state intervention to guarantee and promote formal employment during the Argentine military dictatorship. His switching between different informal occupations was only interrupted by the opportunity to work for

a brief period as an operator in a state-owned company, in which he was however unable to acquire knowledge that he could use after leaving the company. Without specific qualifications, with some reduction in his motor skills and in a national and local context of high unemployment rates (resulting from the implementation of the 1990s welfare system in Argentina), Rubén embarked on a career path that was not only marked by informality but also by long periods of unemployment that he had never experienced before.

Entry in the only formal work that he managed to find and his departure from it as a result of the destabilisation of the company and the downsizing of its staff that that entailed can be viewed as turning points in an informal career path. Joining YPF was thus a before and after. He seemed to be headed for a change of course towards formal labour, but this shift was disrupted by the privatisation of the firm, which became an external event that not only led him into the same informal situation as before but also towards long and recurrent periods of unemployment. This shows how both external bifurcations generate advantages (only during formal employment) and disadvantages that viewed as a chain help to explain the particularities and the direction that Rubén's informal career path was taking when he was being interviewed (in 2008).

10.3.2.3 Case 3: Andrés' Career Path

Andrés is from an eminently working class town on the outskirts of Barcelona, to where his family of six children had moved from southern Spain. At the time of the interview (late 2009), he was 46 years old and a member of staff with the Barcelona metro company (TMB), working both in public service and as a train driver.

Andrés took vocational training (FP1, the equivalent to what is now known in Spain as *formación profesional de grado medio*). However, when Andrés was studying in the 1990s, FP1 was taken from the age of 14 and lasted 2 years. Even before finishing EGB (compulsory primary education) he was working handing out flyers for a chain of jewellery stores in his home town on Saturdays. When he finished EGB, he decided to take a vocational FP1 course because he liked mechanics and thought it would be good to have a trade linked to his personal tastes. He specialised as a lathe operator, while also working part-time for the same network of jewellery stores for which he had previously been distributing advertising. At the end of FP1, his intention was to move on to FP2 (advanced vocational training, a three-year course), but the company he was working for told him that they needed him full time. So he decided to stop taking vocational studies and to work full time instead. He always aspired to work in the trade for which he had been trained, and saw the break in his career to do military service as an opportunity to leave the jewellery company and find a new form of employment. He looked for work as a turner, and even considered joining the *mossos d'esquadra* (regional police force), but found no

success in the short term (the companies he sent his CV to never called back, and he failed the tests to join the police). So, on returning from military service, he ended up back working for the family that owned the jewellers where he had worked before, but this time in a video store that they also owned. While working at the video store, he received job offers from the companies where he had sent his CV, but he decided to continue with the same job.

Andrés felt that he was beginning to gain recognition in his job when the owners of the video store asked if he would like to become a salesman for the group's jewellery stores, selling products door-to-door. He was given an open-ended contract and liked his job. As the years went by, he started managing a small group of sales staff and felt that he had acquired a certain knowledge of the sector. However, his job satisfaction was truncated by the crisis that hit Spain in the 1990s. As a cost-cutting exercise, the company suggested he become self-employed, but the company would pay his contributions. However, the company eventually dismissed him in 1992, shortly after he had married. During this first period of unemployment in his life he combined unemployment benefit with informal work as a stationery salesman, which to a certain extent followed on from his previous job.

After spending more than a year unemployed, he went back to work for the same group of jewellery stores, this time in a variety of roles (as well as sales). But the company did not seem to have recovered from the effects of the crisis and he was dismissed again, although officially it was Andrés who voluntarily left the company. In this second period of unemployment he didn't receive any benefits, and he decided to set up a jewellery business together with his wife, sister and brother-in-law. However, as a way to ensure stable family income ("*so there's always money at home*"), his wife continued to work for the group of jewellery stores where Andrés had been working.

The insecurity of the family business, together with the fact that his wife also stopped working for the jewellery group after having her second child, led the couple to try to take new career paths. A friend told them that they could get work at the Barcelona metro company (TMB) without too many initial training requirements. What's more, the openings that TMB was offering were part-time and substitutions during the summer holidays, so they could combine this possible work with care for their jewellery business. At the end of this two-year period of unemployment, Andrés' wife also started taking vocational training as a stretcher-bearer, and she found work in the hospital where she had done her internship. So although they both started the selection process at TMB, only Andrés went on to work for the Barcelona metro company, where he was in charge of ticket sales and customer services.

Just a week after the end of his summer substitution contract, TMB offered Andrés permanent work on the night shift, with an open-ended part-time contract, which meant he could carry on tending to his jewellery business in the mornings. He continued to combine both jobs until 2006, when TMB offered him a full-time job. Andrés accepted the offer, which involved both serving the public and driving trains, and he and his wife decided to sell the jewellery business in 2007.

10.3.2.4 Case 4: Begoña's Career Path

At the time of her interview (early 2010), Begoña was living in a town attached to metropolitan Barcelona, which between the 1950s and 1970s received a huge volume of immigrant population who arrived in Catalonia from other parts of Spain. Begoña's parents are from Extremadura, and only completed primary education.

Begoña left school at the age of 14, when compulsory education ended in Spain in the 1980s. As she failed two final year subjects, she was not awarded the *Graduado Escolar* leaver's certificate, and she decided to train for a trade in which she would be able to find a job relatively quickly. She wanted to study hairdressing, but her mother did not like that idea and persuaded her to take up dressmaking, which she learned informally in a neighbour's home. She was able to use this knowledge to get her first job as an apprentice at a shirt factory, where she worked for 4 years, until she was 19. She then decided to leave the job at the factory because he didn't like it. However, the company agreed to officially declare her to have been fired, because that gave her the right to receive unemployment benefit for almost 2 years. While out of work, she took a vocational training course on dressmaking, although at the same time she used this period to pay for a hairdressing course, which was what she had really wanted to do when she left school. After this first period of unemployment, Begoña went back to working in the textile sector. She got an offer through INEM (the unemployment office), which he accepted.

In 1993, when she was 22, Begoña had her first daughter. In order to be able to take care of the baby, she got the company to 'fix the papers' so she could get unemployment benefit. She was in that situation for almost two further years. She again received a job offer from the unemployment office, but this time it was a temporary contract justified by production situation in a car factory. But once her initial temporary contract had ended, she was rehired, again on a temporary basis, and this went on until the company was no longer able to chain any more temporary contracts together. Thus began a third period of unemployment that lasted until she found work as a hairdresser (she saw an ad on the street and made enquiries). She liked her job as a hairdresser, and stills claims it is what she most wants to do, but the pay was poor. She left the hairdresser when the car factory she had worked at before called her again, this time offering her a much better wage than what she was getting as a hairdresser ("*the salary was like three times more*"). Once again, when the company was no longer able to chain temporary contracts together, she was out of work. During this fourth period of unemployment, she also took a vocational course, this time to work as a shop assistant. Of the different training options she could choose from, she felt this was best because the hours were most compatible with looking after her daughter, unlike the car factory, where she had to work shifts. Through her internship as a shop assistant, she made contact with the company where she is working now. After 2 years on a temporary contract, the company hired her on a fixed-term basis in 2006. In 2007, her second daughter was born. After maternity leave, she asked to work fewer hours in order to care for her daughter, which the company agreed to, but moved her to a different store against her will.

10.3.3 The Inter-Configurative Biographical Analysis: Case Comparison as an Analytical Key

As we noted in point 2.2 of this chapter, inter-configurative analysis of the comparative biographical perspective implies, on the one hand, contrast of case studies to comparatively analyse how similarities and differences on the macro and mesosocial scales tend to condition or cause life courses in each single case, and, on the other hand, comparing subjects' experiences and choices on that path, to finally deal with the particularities caused by the external conditions and actions in the different stages of the compared life courses. Likewise, in making this contrast, we can and must identify the transitions and turning points or biographical bifurcations to identify how they are caused and what part they play in the direction taken by the different life courses, managing in different ways the contingency and linking over time of advantages or disadvantages in order to appreciate how inequalities are embodied in life stories.

When comparing the cases studied here, we note that in the Argentine workers' life stories it is clear how the macro and mesosocial scales are present, causing and conditioning different forms of employment in different periods. Enrique and Rubén started working for the first time in the 1970s, at which time the military junta (1976–1983) implemented a neoliberal welfare system that would have a long-term impact on the labour market, without immediately making any major changes in terms of labour policy and reform. In the 1980s, both workers found formal employment in a public company, until they were both dismissed in the 1990s as a result of the privatisation policies applied by the welfare system of the time. Their life courses reflect the major transformations that were applied under a neoliberal welfare model that considerably 'shrunk' the state, destabilised many of its companies, dismissed a large number of public employees, liberalised the economy, substantially limited workers' rights and critically transformed the labour market into one that was beginning to show high unemployment rates (Azpiazu and Schorr 2010).

This is evidence of how the macrosocial scale connects with the mesosocial scale, not only generating opportunities at certain times and restricting them at others, but also causing events that lead to disruptions and bifurcations of career paths. The macrosocial scale, associated to neoliberal welfare states, is thus condensed with the mesosocial scale in terms of institutional policies that reveal the shift between the existence and promotion of a sizeable number of companies and public jobs, and privatisation and the dismissal of state employees who are no longer able to work for these firms. The transitions between these macro and mesosocial processes lead in both cases to moments of disruption, which are both favourable when they enter formal public employment and unfavourable when they lose these jobs and resort to subsistence self-employment.

In the Spanish workers' life stories, three main structuring factors can be identified. The first, and possibly most obvious, is the effect of the gender variable on career paths. Begoña's daughters evidently feature prominently in her story, and her career path is built around the possibilities of combining paid work with care for her

children. The influence of gender on career paths is not one of the goals of this chapter, but should nevertheless be noted. Secondly, the influence of the crisis of the 1990s is evident, as it was in the Argentinian cases, but only with regard to Andrés. Begoña's path is less affected by the crisis, partly because her situation was already unstable even before the crisis, and partly because its worst years (1992 to 1995) coincided with her becoming a mother and preferring to take care of her daughter. Thirdly, and perhaps most importantly in relation to the discussion of inequality in career paths, is the role of the (un)employment benefit system in Spain. Its evident lack of resources, compared to other European systems, and the neo-liberal reforms implanted since before the 1990s (Banyuls et al. 2009) should not conceal the important role that social welfare plays in labour transitions and trajectories in Spain (Miguélez and Recio 2010). These effects are very clear in both stories. They both involve the possibility of receiving vocational training while out of work. In Begoña's case (and in that of Andrés' wife) this training helped to find work and also led to a certain change of career. Also in both cases, unemployment benefits allowed our respondents to obtain resources that somehow alleviated their lack of income, albeit clearly insufficiently as demonstrated by Andrés' need to combine his benefit with informal employment.

The design of institutional support for unemployment is a good example of the connections between the macrosocial scale and the mesosocial scale in Spain. The existence of an unemployment benefit system is characteristic of European Union member states, but the institutional methods used to provide it are highly varied (Lefresne 2010). In Spain, there are very few conditions on the way unemployment benefits can be used, which allows (and at the same time obliges) people without work to choose from a relatively high number of options (López-Andreu and Verd 2011a). This flexibility means benefits can be used by workers as a protection mechanism against various contingencies in life, allowing them to deal with situations for which these benefits are not specifically designed, but for which there are no other benefits that do serve that purpose, unlike in other countries (Bartelheimer et al. 2012). These resources are used due to the weakness or absence of other social policies that are more adapted to specific situations (maternity pay, scholarships, etc.) and continuous instability in certain types of career paths, as is so manifestly the case with Begoña.

Meanwhile, turning to the experiences, judgements, choices and actions of the subjects during their career paths, we note that although we have found similarities in terms of the possibilities, conditions and bifurcations that the macro and mesosocial scales tend to produce, when we specifically focus on microsocial aspects, our cases present differences both within and between countries.

If we compare then the paths of the Argentine workers, we observe that while Enrique finished his studies at an industrial school and centred his labour transitions on the crane operating skills that he had acquired during some of his earliest jobs, Rubén entered the labour world without completing compulsory secondary education and with no specific 'know-how'. The possession or not of labour skills, acquired personally rather than at professional training institutes, is a key factor behind these career paths. While Enrique's trade meant he could change jobs

whenever he found positions at companies that offered better pay, Rubén's lack of knowledge meant he was permanently in and out of work and changing between activities and sectors without ever settling anywhere. Moreover, Rubén suffered accidents at work due to the physicality that his jobs entailed, a situation that Enrique did not have to go through.

This chain of individual factors that affect the course and differentiation of these trajectories, one eminently focused on a trade and conditions shifting between instability and formality, and another based on seizing informal opportunities whenever they arose, only became equated under an institutional state policy that fostered formal work, i.e. when they both find jobs in the public oil company. The government's withdrawal from labour affairs meant they had to start out again in the context of an economy in crisis and a job shortage. Left to their own devices, their transitions send them back in different directions. Although both workers left YPF to go into subsistence self-employment, over time Enrique was able to use his trade to get his life course back on track, while Rubén continued to work informally with constant interruptions due to unemployment.

Something similar happened in the Spanish case. Although Andrés had no institutional certification of his 'trade' as a jeweller, his accumulated experience allowed him to overcome the economic crisis of the 1990s through self-employment. However, as in the case of Enrique in Argentina, his own resources were insufficient to cope with this project without help from his wife. This is 'subsistence' self-employment, which continued until it was possible for the family to obtain a more stable and less 'sacrificed' source of income. Andrés' departure from self-employment, however, is different from Enrique's, since it does not involve a radical change of sector (he had experience of sales and dealing with clients, which was undoubtedly taken into account when TMB hired him to serve the public). As for Begoña, as she had nothing more than a school leaver's certificate (she would later obtain a *Graduado Escolar* by her own account), she was forced to accept unsatisfying jobs with very low pay. However, unlike Rubén, Begoña does have a trade in mind (being a hairdresser), which guides her choices and actions once she has achieved a certain level of financial autonomy. During her first period of unemployment, she invests her unemployment benefit in paying for a private academy that provides her with the training she needs to become a hairdresser. Her time in this trade is fleeting, for she is disappointed by what she considers to be very poor pay, but at the time of the interview she insists that she has not given up hope of one day becoming a self-employed hairdresser, which takes us back to the need to gather the necessary resources in order to set up one's own business. While in Rubén's case, employment for a brief period as an operator in a state-owned company involved no opportunity to acquire a specific skill, and merely the chance to get out of informal work and unemployment, in Begoña's case, periods without work constitute certain opportunities to gain skills through vocational training, which is what she achieves when doing work experience in a supermarket, which leads to a radical change of sector and the beginning of a completely new career.

In the Argentinian case, Enrique and Rubén's stories show that it is only when there is an institutional government policy that promotes formal work that it is

possible to somehow reverse the weight of occupational qualifications (acquired individually or not) on career paths. The Spanish cases show that the (negative) effect of a lack of skills for employment can partly be reversed through non-formal vocational training (called occupational training, in Spain). Although the debate on the real effects of occupational training on the careers of unemployed people is still open (Miguélez and Recio 2010; Verd and López-Andreu 2014), some data shows that if it has any positive effect at all then this is on people with more unstable career paths and fewer qualifications (López-Andreu and Verd 2011b).

Finally, it is useful to make a final consideration from the comparative analysis of the four trajectories analysed in this chapter. Although the foregoing paragraphs have highlighted the influence that a society's welfare and employment systems (macro level) and institutional social protection schemes (meso level) have on—and connect with—individual actions and decisions (micro level), our analysis of life stories shows that another key element that links different states stems from the inequalities and resources with which people start out (private family and personal resources). This aspect was not the focus of our analysis, but we should note that the longitudinal accumulation of advantages and disadvantages, and in general the production and reproduction of social inequality, is explained by this unequal distribution of resources that affects individuals in such dissimilar ways. This inequality of resources is related to people's positions in the social structure as a result of tax and income policies established by governments, a proper analysis of which would require the same amount of space that has been used thus far.

10.4 Final Thoughts. The Development of an International Comparative Perspective Based on Analysis of Unequal Life Courses

In this chapter, we have noted the relevance of a study of social inequalities from a comparative biographical perspective, since it offers unrivalled methodological advantages by linking across time aspects that are situated on the macrosocial level (structural conditions and processes) with others on the mesosocial level (the role of institutions) and the microsocial level (individual practices, representations, experiences and strategies, if any). This diachronic view of inequalities is shown to be relevant, as it can be used to identify how deprivation and privilege are produced, reproduced and transmitted over time.

We also note that the comparative biographical approach can be used to identify how those events, transitions and stages that constitute moments of disruption to life courses fit with the accumulation of advantages and disadvantages, revealing the relevance to these life courses of the bifurcations caused by specific events in a subject's life (an accident, motherhood) or by events that are external to them (an institutional policy to promote or reduce employment). We have also shown evidence in favour of intra-configurative and inter-configurative biographical

comparison and have presented a specific comparative exercise to showcase the potential of the proposed methodological perspective.

We shall therefore end by pointing out that, as has been demonstrated, the comparative biographical perspective and its intra and inter-configurative analysis are a proven method for revealing the particularities caused by external conditions and subjective actions in the different stages of comparative life stories, highlighting the relevance of social agents for understanding how, in the face of different or similar macrosocial and mesosocial contexts, different life courses are constructed that are the result of a series of advantages and disadvantages that configure and reconfigure social inequalities over time.

Appendix 1. Enrique (49): Craft Worker—Crane Operator

Lived life—Stages and states		Transitions			Objectives	Institutional resources (meso)	Macro-context				
Age	Year	Stages	Labour situation (state)	Training (state)				Type of occupation (formal, precarious, informal)	Personal or family events	External significant events	Intentions and preferences related to the next stage
16	1971	1. First job	Lubricant recovery	Vocational training: Industrial secondary studies	Informal				Earn more money	Public education system	Welfare and employment models
19	1974	2. Second job	Operator in oil company, maintenance company	Handling heavy equipment, crane	Precarious (with fixed-term contract)				Precarious (with fixed-term contract)	Teaching/formal training in the workplace	
21	1976	3. Third job	Crane operator at oil company		Formal				Earn more money		Military government, (first stage of neoliberal economy in Argentina)
23	1978	4. Fourth job	Crane operator in company providing services to a steel company		Precarious (with fixed-term contract)				Earn more money		
25	1980	5. Fifth job	Crane operator in company providing services to a steel company		Precarious (with fixed-term contract)	He marries and moves in with his wife			Earn more money		

27	1982	6. Sixth job	Crane operator Astillero Río Santiago	Formal (public company)			Earn more money	Recruiting new unskilled workers from public oil company training on the job. Mobility: 3 promotions.	Family improvisation that leads to the closure of the enterprise when he gets a new job	
31	1986	7. Seventh job	Oil operator. Does not use his professional training as a crane operator	Formal (public company)		Due to the privatization of the oil company, he accepts voluntary retirement.				
38	1993	8. Eighth job	Set up a grocery with the oil company voluntary retirement money	Informal	Wife's contribution to the home's survival		Have a job that would give them some income, because they had two small children. Alternative to the impossibility of being unemployed without earning income (no unemployment benefit for voluntary retirement)			
42 a 49	1997 a 2004	9. Ninth job	Crane operator in Astillero Río Santiago	Formal (public company)			Formally enter the labour market			

Appendix 2. Rubén (44). Precariousness Path without a Craft

Lived life—Stages and states		Transitions			Objectives	Institutional resources (meso)		Macro-context			
Age	Year	Stages	Labour situation (state)	Training (state)	Type of occupation (formal, precarious, informal)	Personal or family events	External significant events	Intentions and preferences related to the next stage	Public resources	Private resources	Welfare and employment models
14	1974	1. First job	Soda (sparkling water) home delivery	Incomplete secondary education training due to need to work	Informal	Drop out of secondary school		Earn money	Public education system		
15	1975	2. Second job	Carpenter		Informal			Possibility of more work continuity		Informal training on the job	
16	1976	3. Third job	Kitchen assistant in restaurant	Learning at home: His mother and father worked, so he had cooked for his family	Informal	Hand injury from occupational accident that leads him to quit that job		Earn money			
20	1980	4. Fourth job (7 years but interrupted, when there was work)	Building sector worker		Informal			Earn more money		Informal training on the job	
26	1986	5. Fifth job	Operator in a company		Precarious (fixed-term contract)			Earn more money and have a stable job			

27	1987	6. Sixth job (7 years)	Operator in the public oil company	Formal (public company)	Marriage and birth of the first child. In itinere accident, which limits his subse-quent ability to work	Due to the privatization of the oil company, accepts voluntary retirement. And builds his own house	Recruitment of new unskilled workers from public oil company. Training on the job mobility: 2 promotions		
34	1994	7. Seventh job	Informal work in the building sector	Informal					
35	1995	8. Unemployed			His wife worked as a maid and is the main breadwinner.				
36	1996	9. Eighth job	Informal work in the building sector	Informal					
39	1999	10 ninth job	Truck driver at ice cream company	Precarious (fixed-term contract)					
41	2000	11. Unemployed but with secondary jobs	Informal work in the construction sector		His wife worked as a maid and is the main breadwinner.				

Appendix 3. Andrés (46): Craft Worker–Subway Company

Age	Year	Lived life—Stages and states				Transitions		Objectives	Institutional resources (meso)		Macro-context
		Stages	Labour situation (state)	Training (state)	Type of occupation (formal, precarious, informal)	Personal or family events	External significant events		Public resources (institutional intervention)	Private resources	
14	1977	1. First job.	Handing out advertising leaflets of a jewellery shop on Saturdays. Got the job because his sister worked there.	Formal training: Lower secondary school	Informal	They are six children in his family	He accepted the job as a first step to stay in the company once he finished studying.	Institutional: Public education system	Private resources	Welfare and employment model	
15	1978	2. Second job and vocational training (middle grade)	Part-time job in the jewellery shop (mornings).	Vocational training: Lathe operator (middle grade)	Formal			Institutional: Public education system	Accumulated experience / informal training on the job		
17	1980	3. Second job and vocational training (high grade)	Part-time job in the jewellery shop (mornings).	Vocational training: Lathe operator (high grade) he quits this training because the jewellery owners needed a full-time employee: he had to work full-time or he would be fired.	Formal		He would have liked to continue studying, but he couldn't afford to lose the job.	Institutional: Public education system	No grant for studying, lack of economic resources in his family		
18	1981	4. Third job.	Full-time job at the jewellery shop.	Individual training: Distance course on electricity.	Formal				Accumulated experience / informal training on the job		

19	1982	5. Inactivity I: Military service.											
21	1984	6. Fourth job.	Job in a video-club, same company as the jewellery shops.	Formal								Accumulated experience / informal training on the job	
24	1987	7. Fifth job.	Jewellery sales representative, in the same company he worked for before full-time job	Formal								Accumulated experience / informal training on the job	
28	1991	8. Sixth job.	Jewellery sales representative. The company has economic problems and asks him to be formally self-employed	No contract ("bogus self-employed")				Economic recession	Marriage, moves in with his wife				
29	1992	9. Unemployment I	Unemployed. The company had economic problems, so he was dismissed.					Economic recession			Unemployment benefit		Institutional: Rights of access unemployment benefit

(continued)

Lived life—Stages and states						Transitions		Objectives	Institutional resources (meso)		Macro-context
Age	Year	Stages	Labour situation (state)	Training (state)	Type of occupation (formal, precarious, informal)	Personal or family events	External significant events	Intentions and preferences related to the next stage	Public resources (institutional intervention)	Private resources	Welfare and employment model
29	1992	10. Informal employment 1	Works as sales representative, selling office stationery	Occupational training: Welding	Informal		Economic recession		Unemployment benefit Occupational training		Institutional: Conditions of use unemployment benefit
30	1993	11. Seventh job	Full-time job at the jewellery shop.		Formal	He has his first child in 1995	Economic recession				
33	1996	12. Unemployment 2	The company had economic problems. They threatened their employees with receivership to make them leave and not have to fire them.				Economic recession	He and his wife were scared: They worked in the same company; they had a mortgage and a small child. They wanted to work for themselves.		He has no right to unemployment benefit because formally he quit his employment	
34	1997	13. Eighth job (family business) 9 years	Set up a family business, a jewellery. His wife, his sister and his sister's husband are associates in the business. He left the job but his wife stayed in the jewellery for some more time.		Formally self employed	Each couple asks for a mortgage to set up the business. When his wife left the shop she was unemployed for 2 years. She had occupational training.		After some years, he felt tired with the shop. The job at TMB was something stable and he wouldn't have to worry about work issues after work. Plus, in the future, he might be able to work in TMB's workshops as a mechanic.			

37	2000	14. Ninth job (part-time), combined with the family business (6 years).	<p>Job at TMB (starting with summer substitution, morning shift). Only 1 week after the end of his summer contract, he started in the night shift, open-ended contract. At the same time, in the morning worked for about 3 or 4 hours in the jewellery shop.</p>			<p>He has his second child in 2000. He applied for the job because his wife was doing it too. But she found a job in a hospital and she didn't take the job at TMB.</p>		<p>Significant professional event: More stability, better remuneration, more time to spend with the family, no worries</p>		<p>Accumulated experience / informal training on the job</p>
43	2006	15. Ninth job (full-time) (3 years).	<p>Job at TMB, full-time, open-ended contract, morning shift. He couldn't work at the jewellery any more.</p>	<p>Company training: Fire-fighting, train-driving, first-aid & training for trainers (new employees).</p>	<p>Formal</p>	<p>In 2007 they sold the family business.</p>		<p>He is happy with his job, so he hasn't tried to get the job as a mechanic in the workshops.</p>		<p>Accumulated experience / informal training on the job</p>

Appendix 4. Begoña (38): Precariousness Path without a Craft–Retailing Company

Lived life—Stages and states		Transitions			Objectives	Institutional resources (meso)	Macro-context				
Age	Year	Stages	Labour situation (state)	Training (state)	Type of occupation (formal, precarious, informal)	Personal or family events	External significant events	Intentions and preferences related to the next stage	Public resources (institutional intervention)	Private resources	Welfare and employment model
14	1985	1. End of compulsory education (but without the lower secondary school leaving certificate) 2. First paid job (4 years)	Job 1: Shirt factory	Individual training: Dressmaking	Formal			Find a job	Public resources (institutional intervention)	Her training was done informally at her neighbours', who were friends of the family	
15	1986		Job 1: Shirt factory		Formal			She didn't like her job		Accumulated experience / informal training on the job	
19	1990	3. First unemployment period	Unemployment 1	Occupational training: Dressmaking Individual training: Hairdresser					Occupational training (public employment service) Unemployment benefit	Hairdressing course paid with the resources obtained from the unemployment benefit	Right to receive occupational training Unconditional right to receive her unemployment benefit
20	1991	4. Second paid job	Job 2: Shirt factory	Individual training: She obtained the lower secondary school leaving certificate (Graduado escolar)	Formal	She had her first child in 1993		She left her employment because she wanted to look after her child	She received the job offer because she was registered at the employment office Public formal training	Accumulated experience / informal training on the job	

22	1993	Unemployment 2								Unconditional right to receive her unemployment benefit
24	1995	5. Second unemployment period 6. Third paid job	Job 3: Car factory	Her child is already in the nursery school	Formal (fixed-term contract)					Unemployment benefit She received the job offer because she was registered at the employment office Accumulated experience / informal training on the job
26	1997	7. Third unemployment period	Unemployment 3							Unconditional right to receive her unemployment benefit
28	1999	8. Fourth paid job	Job 4: Hairdresser		Formal			She was very happy with the job, but the wage was low		Accumulated experience / informal training on the job
30	2001	9. Fifth paid job	Job 5: Car factory		Formal (fixed-term contract)			She left the hairdresser's because she was offered a much better wage		She received the job offer because the car factory already knew her Accumulated experience / informal training on the job
32	2003	10. Fourth unemployment period	Unemployment 4			Occupational training: Retailing		She didn't want a job in a factory, because of the usual shift work. She wanted to spend more time with her daughter		Right to receive occupational training Occupational training (local training centre) Accumulated experience / informal training on the job

(continued)

Lived life—Stages and states					Institutional resources (meso)		Macro-context			
Age	Year	Stages	Labour situation (state)	Training (state)	Type of occupation (formal, precarious, informal)	Transitions		Objectives		
						Personal or family events	External significant events		Public resources (institutional intervention)	Private resources
33	2004 (continued up to the moment of the interview, 2010)	11. Sixth paid job	Job 6: Supermarket		Formal (initially with a fixed-term contract, and after 2 years with an open-ended contract)	She had her second child in 2007		After having her child, she had maternity leave, and after the leave she asked for a reduction in her working hours. The company accepted but changed her work centre.		Welfare and employment model

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Chapter 11

Social Times, Reproduction and Social Inequality at Work: Contrasts and Comparative Perspectives Between Countries



Màrius Domínguez-Amorós, Leticia Muñiz, and Gabriela Rubilar

Abstract If the focus is placed specifically on the problem of work and family, the daily life of people and their use of time are a main problem. This time is expressed in both freely available time, which is related to activities, and time of the productive and reproductive sphere. This chapter considers work in a broad sense and takes into account the sexual division of labour.

Specifically, this chapter will explore transformations in time use and social inequality in unpaid work. For this purpose, a comparative analysis of time-use surveys will be used, analysing the time spent, and the time dedicated to household chores in Chile, Argentina, Uruguay and Spain. From an analytical viewpoint, the analysis will place social reproduction at the centre of the socio-economic system, showing that the economic crisis has affected women and men differently, and that in both Europe and Latin America the family pattern is being replaced by a dominant family model of a male provider and a double presence of women. The large-scale incorporation of women into the labour market has emphasised the role that women assume in the domestic sphere perpetuating gender segregation in employment and in domestic and care work.

Keywords Gender inequalities · Social times · Productive and reproductive work · Sexual division of labour · Europe · Latin America

M. Domínguez-Amorós (✉)
Bienestar, comunidad y control social, Universitat de Barcelona, Barcelona, Spain
e-mail: mariusdominguez@ub.edu

L. Muñiz
Instituto de Investigaciones en Humanidades y Ciencias Sociales, Universidad Nacional de La Plata,
La Plata, Argentina
e-mail: lmunizterra@conicet.gov.ar

G. Rubilar
Universidad Católica de Chile, Escuela de Trabajo Social, Santiago, Chile
e-mail: grubilad@uc.cl

11.1 Introduction

The aim of this chapter is to present a comparative analysis of time use and social inequality in the distribution of non-paid and care work in homes. In a context where the more traditional role of a single provider (male breadwinner/housewife household) is being replaced by the two-income model, the interest lies in analysing how strategies have been modified in relation to the contributions made in terms of time and work by the men and women that form households. Furthermore, the present work contributes to the comparative studies addressing societies that have been identified as familiarist such as Argentina, Chile, Uruguay, and Spain.

The analysis of time, as an essential dimension of the organisation of society, serves to explore a large number of social behaviours, dynamics and habits; as well as social inequality processes according to people's life experiences, goals and priorities.

In relation to these social inequality processes, the elimination of economic inequalities continues to be a key element, with women's access to the labour market being considered as one of the main mechanisms to overcome said inequalities. In this regard, although there has been unquestionable progress in the participation and integration of women in paid work (higher activity and employment rates, improved education and qualification levels, increasing presence in certain occupations and activities, etc.), it has not been possible to transform a labour market that continues to display a clear predisposition towards gender inequality, penalising the specificities of the majority of women, undervaluing their skills and perpetuating situations of segregation, vulnerability and dependency, creating new obstacles and new forms of inequality (Gálvez and Rodríguez-Madroño 2011).

The elements, processes and dynamics at play behind the perpetuation of work inequality between women and men are diverse, and they must be understood in the framework of specific contexts and dynamics. But, evidently, one of the fundamental reasons is the unequal distribution of time and responsibilities in relation to domestic and care work¹. Labour and economic inequality and the inequality of domestic and care work are processes that mutually reinforce each other.

In this regard, the research undertaken since the 1980s, especially from feminist approaches, has underscored the essential relevance of the study of "times generating reproduction" (times necessary for life: care, affection, relationships, leisure, ...) to highlight power relations and gender inequalities, and challenged a view focused on the "commodified time" of the (dominant) economy (Carrasco 2013).

If it is considered that the logic of time spent on care is synchronic, discontinuous and defined by subjective aspects of daily experience (Domínguez 2020), it is

¹The concept of domestic and care work is also a subject of debate, with different conceptualisations and approaches. In this work we will call it domestic and care work, following that set out by Bundlender (2010) who specifies: unpaid domestic work in the household (widely equivalent to domestic chores) and unpaid care work for people in the household.

essential to explore the possibilities of coordinating paid work times with other times of life: relationships, care, family, cultural activities, leisure, etc.

Without a doubt, unpaid domestic and care work, consistent with the life cycle, is an essential factor that contributes to the welfare of people, their families and societies. Its aim is to guarantee the health and welfare of all people, whether women or men (those providing care and those receiving care).

Thus, considering families as providers of welfare and the main—although hidden—role of a large part of the work performed by women helps to identify the sexual division of work (the division between paid work and unpaid domestic and care work) and the different use of time as the mainstay of the economic, social and political subordination of women (Aguirre 2015; Ferrant et al. 2014; Carrasco and Domínguez 2011; Folbre 2008; Arriagada 2007).

As regards work times, several research projects demonstrate the tendency towards convergence between men and women in their dedication to work: the increase in the participation of women in paid work and a decrease in unpaid work, as well as a higher presence of men in domestic and care work. This convergence is slow in a context in which the sexual division of work continues and persists, reproducing the almost exclusive assignment of reproductive and care work to women, without entailing shared responsibilities in households (Kan et al. 2011; Bianchi et al. 2000; Gálvez et al. 2010; Kan and Gershuny 2010; Sayer 2010; Treas and Drobnic 2010; Hook 2006; Gershuny 2000; Moreno 2009; Marini and Shelton 1993).

The presence of women in both jobs and, therefore, their higher work load and consequent reduced spare time, time for themselves and time for social and political participation, limits their options of joining the labour market, and perpetuates power relations and gender order, affecting their welfare and quality of life (Cepal 2017b, 2016; Ferrant et al. 2014; Calero et al. 2015). This high cost, resulting from the social response to caring needs and the social organisation of care, explains the social inequality processes existing in the labour market: activity rates, situations of underemployment, vertical segregation, salary gap, etc. In addition, there are clear mechanisms of internal inequality between women since this situation is more costly in those women with fewer resources for employment (education level and previous work trajectories), with greater demands for care in households (presence of minors, and elderly, infirm or disabled adults) and with fewer possibilities of redistributing the care needs of the household (to public or private services outside of the home, or to solidarity networks) (Rodríguez 2015).

Under this system, the debate surrounding productive and reproductive work acquires new meanings when the demographic, social, economic and political changes registered in contemporary societies are analysed. More specifically, and as pointed out above, the position of women in the productive sphere and their economic participation in the labour market is related to the way in which issues related to reproductive work are resolved individually and socially and their association with the commodification processes of care work (Izquierdo 1998; Torns 2008), the return of care to the home and care chains (Hochschild 2002; López Gil and Pérez Orozco 2011; Mora and Medina 2011). Thus, the rediscovery of care work times and its consolidation as a subject of study has occurred against the background of

the 'care crisis' (Pérez Orozco 2006) which serves to analyse the different ways of organising care work and the (re)configurations of the traditional welfare actors (state, market and families) to respond to new needs and demands².

This chapter analyses the relation between welfare and social times, considering some debates on the gender perspective, the social division of work and its implications on social inequality. Considering that productive work has to date been the dominant category from which class and social mobility studies have been developed, in this chapter the problem of reproductive work is included to highlight that this is a determining factor in the social position of individuals. Bearing in mind, therefore, that, in social reproduction, the reproductive sphere (specifically domestic and care work) has traditionally been subordinate to the productive sphere, it is essential to recover its importance insofar as it directly affects the position of individuals in the labour market.

To do so, we propose performing an empirical analysis that reveals the social inequality processes in work times (productive and reproductive); through a comparative analysis of time-use surveys, analysing the time spent on care work and the time dedicated to domestic household chores in dual-income heterosexual couples.

After this introduction, the chapter is structured in five sections. The first of these gives an account of some of the methodological considerations in the current debate on the conceptualisation and measurement of time use. Next, the most relevant contextual and macrosocial elements are presented, which help to obtain a comparative view of the countries being analysed. Specifically, the Gender Gap Index of the World Economic Forum and indicators related to gender ideology provided by the World Value Survey will be used. The fourth and fifth sections present a specific comparative analysis in relation to work times, reproduction and social inequality. More specifically, the factors explaining the gender gap in the distribution of unpaid domestic and care work will be analysed for households with dual-income heterosexual couples in Argentina, Chile, Spain and Uruguay. The chapter ends with some of the conclusions concerning social times, reproduction and inequality in work.

11.2 Theoretical-Methodological Considerations

As has been pointed out, the large majority of studies, especially economic studies, have provided a partial and incomplete view of work since they have focused on paid work (productive), disregarding unpaid activities that generate welfare (reproductive work) and rendering their contribution and relation with other daily activities invisible.

Since the 1970s, vast theoretical and methodological work has been developed in several disciplines, providing empirical evidence about the contribution of domestic

²Although the importance of the analysis of welfare states, care regimes and public policies is unquestionable, it will not be developed in this chapter, since they are the subject of other chapters in this book.

and care work to welfare, and to the reproduction and sustainability of human life (Carrasquer 2013). On an empirical level, time-use studies have become an ideal quantitative methodology to collect information about different work times; to show times as a key element in the study of inequalities between women and men (Durán 1997); and to tackle time distribution, in the different activities, as an important aspect in the welfare of the population, reflecting inequalities in the access to resources and affecting opportunities and capabilities (Aguirre 2015; Aguirre and Ferrari 2014; Cepal 2017a; Batthyány 2015a; Aguirre and Ferrari 2014; Carrasco and Domínguez 2014; Durán and Milosavijevic 2012; Antonopoulos and Hirway 2010; Eurostat 2008). Furthermore, this type of study helps to formulate public policies that respond to social care needs through joint responsibility and the equal distribution of care work in households, as well as advocacy actions in this respect with implications on policies or possibilities of reforms (Rajivan 1999).

This type of empirical work contributes towards verifying the need to broaden the operational definition of the theoretical constructs of work and times, incorporating measures that include the multi-dimensional nature of these concepts and the dualities affecting them.

This section gives an account of some of the relevant challenges in the current debate, both from theoretical-conceptual approaches and from methodological approaches, which have developed around the measurement and empirical studies of times and their inequalities.

The time-use methodology, and in particular, time-use surveys influenced debates which, from a critical feminist perspective, affected the actual conceptualisation of time. Time in this case is understood as invariable, homogeneous, independent of context and compared to a commodified money-time which is dominant, recognised and valued. Furthermore, it is a time that reflects the structures of power and of capitalist and patriarchal relations (Adam 2004; Carrasco 2016, 2005; Carrasco and Recio 2014; Domínguez et al. 2019; Ramos 2011, 1990; Torns 2001, 2004).

As a clear example of this, the chief methodological trend can be situated in this type of studies: the countable approach to care work (or to part of it: domestic and family) calculated and measured in reference to paid work time; valued and recognised time, around which the other times, essentially care work time, must be organised.

This type of approach has highlighted some important limitations in the study of times, setting out highly relevant theoretical-methodological challenges. Most notable of these is the multi-dimensional understanding of domestic and care work. This means both the need to specify the implicit conception of time underlying the measurement; and to combine the quantitative-countable measurements of time use with those that show the subjective aspects involved in the caring relationship and which help to obtain information about the consequences of the interrelation of daily times. Notable among these are: incorporating measures that highlight the emotional dimension of care; redirecting the interest towards the protagonist subject providing the care; and adding the assessment the protagonists make of their own activities, as well as the dynamic and context in which they develop them.

In relation to the subjective aspects of daily life, key to understanding the social definitions of time, its symbolic structures and hierarchical relations, it is particularly relevant to tackle the social norms, values and imaginaries that reproduce and legitimise female protagonism in care time and the heterogeneity of practices and world views of care (Almeda et al. 2016; Castelló 2011; Domínguez et al. 2019; Jiménez-Martín and Vilaplana 2012; Martínez-Buján 2014; Moreno et al. 2013; Ortiz-Monera et al. 2016; Rogero 2010; Tobío 2012).

In this regard, the World Value Survey (WVS) developed by the Institute for Social Research at the University of Michigan falls under this type of approach. At present, the seventh wave of surveys, to be finalised in 2019, is being conducted with 80 countries and with a particular emphasis on the study of emerging topics and perspectives that entail a change in values. Of particular significance in this survey are the questions comparing the values of the current generation with the values of future generations as regards society values, the role of women, conceptions of the family, views on work and public policies.

In Latin America, the work of *Latinobarómetro* is noteworthy. It conducts an annual study of public opinion which analyses the development of democracy, economy and society as a whole, using public opinion indicators which measure attitudes, values and behaviours. The results of this study, based on surveys (20,000) applied in 18 countries from Latin America from 1995 (beginning of the measurements) to date, help to establish comparisons between countries from the region and within each country.

The second theoretical-methodological challenge in relation to the approach towards times lies in the difficulty perceiving and defining care time by the people themselves and their lower implementation and specification in the majority of statistical operations. In this regard, we call for greater effort in detailing and contextualising questions on time use when caregiving (Bundlender 2010; Ramos 2011) since the more detailed and contextualised the activities specified, the broader the time registered for these activities.

The third challenge, closely related to the two above, is related to the difficulty perceiving and defining the time dedicated to management tasks, maintenance, organisation and responsibilities of care work; and passive caregiving time, a time of continuous availability, of continuous support; a hidden time that reveals the experiences lived—the energy and fatigue—and the specific conflicts—tensions and conflicts—of time and timetable organisation.

Fourth, recovering the structure of the different times and their time sequences (synchrony, simultaneities and discontinuities of the logic of paid work time and caregiving time), is proving to be an important line of work in a context in which labour flexibility guidelines are gaining ground. In this context, contradictions emerge between both time logics and their gradual desynchronization which is a great burden on women in a situation of double presence (Lewis and Weigert 1992).

Lastly, the measurement of times must recognise inequality processes, highlighting the suitability of opening up the analysis to the great absentee of care work, the male gender, and to the persistence of other axes of inequality and social stratification in caregiving time. Several studies verify the persistence and emergence of

social inequalities on the grounds of gender, origin, ethnicity and social class which emerge firmly in relation to the migratory processes linked to caregiving in global capitalism (Aulenbacher et al. 2018; Fraser 2016; Goñalons-Pons 2015; Kofman and Raghuram 2015; Lutz 2017; Martínez-Buján 2014; Moreno et al. 2013; Oso and Parella 2012; Parella 2003).

In relation to the time-use data collection tools, in European countries, the methodological standardisation in time-use studies meant we could avail of both the database of the Multinational Time Use Study (MTUS) for 25 countries, and the Harmonised European Time Use Survey (HETUS) harmonised since 2005 with the European time use guidelines, from the Statistical Office of the European Union (EUROSTAT 2008). Specifically, to guarantee a higher level of data quality and comparability between countries, the surveys, formats of the time-use diaries, procedures to collect data and the list of shared activities are standardised. The time-use diary is a self-administered diary with set 10-min intervals to fill in on the randomly designated diary days.

In turn, in recent years, the development of time-use surveys in the majority of Latin American countries, and the studies sponsored by the United Nations Economic Commission for Latin America and the Caribbean (ECLAC), and national statistical institutes, have generated relevant information to highlight gender inequalities in the time dedicated to unpaid domestic and care work (Batthyány 2015a; Calero et al. 2015; Rodríguez 2015; Aguirre 2015; Aguirre and Ferrari 2014; Durán and Milosavijevic 2012; Bundlender 2010; Espejo et al. 2010; Arriagada 2007). Nevertheless, the comparative empirical work in Latin America is still weak, scarce and discontinuous. These include the works of Amarante and Rossel (2017), with data from Colombia, Mexico, Peru and Uruguay; Campaña et al. (2017), with their study on time-use data from Mexico, Peru and Ecuador; Bundlender (2010), with his analysis of Argentina, Nicaragua, India, South Korea, South Africa and Tanzania; and Antonopoulos (2008), with time-use surveys from Bolivia, Guatemala, Mexico, Nicaragua and other countries from the OCDE.

11.3 General Comparative Overview of the Countries

On a comparative level in Europe, empirical evidence shows that, while a reduction in gender differences can be observed in time-use over the past 50 years, as a result of more women dedicating their time to paid work and more men dedicating their time to domestic and care work, gender segregation in relation to domestic chores persists. Women continue to do the more routine activities while men focus on doing the more flexible and less rigid ones (Moreno 2015).

Among the factors explaining this reduction, some are related to the second demographic transition: the widespread access of women to education, the higher participation of women in the labour market and the consolidation of social rights associated with the goal of equal opportunities (Sayer 2010). In addition to this

Table 11.1 Participation time and participation rate in the main activity by sex

Country & Participation time/rate	Females			Males		
	Employment, related activities and travel	Household and family care	Leisure, social and associative life	Employment, related activities and travel	Household and family care	Leisure, social and associative life
Spain						
Time	6:43	4:36	4:53	7:55	2:36	5:44
Rate	29.5	93.0	97.7	40.7	75.9	97.7
France						
Time	6:13	4:04	4:54	7:21	2:53	5:30
Rate	30.5	93.6	97.7	41.4	80.5	97.0
Italy						
Time	6:43	5:09	4:35	8:04	2:22	5:26
Rate	25.8	92.7	97.9	46.5	68.3	98.5
Finland						
Time	6:50	3:41	5:44	7:41	2:32	6:33
Rate	30.2	96.0	99.6	36.1	90.7	99.0
United Kingdom						
Time	6:27	3:50	5:03	7:15	2:27	5:40
Rate	32.3	95.2	98.4	43.8	87.7	97.5

Participation Time per day (Partic. Time, hh:mm) and Participation Rate (Partic. Rate, %). European countries analysed

Source: author's own elaboration based on Harmonised European Time Use Surveys (HETUS), Eurostat, 2010

process, globalisation processes and transnational migrations may indicate a third movement.

Table 11.1 provides a first approach to the participation and time dedicated by women and men to paid work and domestic and care work according to the time-use surveys in European countries.

As regards European data, the time gap indicates that women, apart from in France, work more (higher overall work load) than men on a typical day: from 18 min in Finland, 35 and 48 min respectively in the United Kingdom and Spain, to 1 h 26 min in Italy.

The analysis according to the type of work verifies that women dedicate less time than men to paid work (from 48 min in the United Kingdom to 1 h 21 min per day in Italy). This lower participation in the labour market does not offset their greater dedication to domestic and care work: they dedicate slightly more than 1 h a day in France and Finland, 1 h 23 min more in the United Kingdom, 2 h in Spain and nearly 3 h per day in Italy.

Thus, as regards unpaid and care work, it has been verified that women register higher participation and time than men in reproductive work and that it is precisely this unequal distribution which, among other elements, restricts the participation of women in the labour market, conditioned by the assignment of women to domestic and care work.

Table 11.2 Time dedicated to total work—paid and unpaid—of the population aged 15 and above, per sex (in weekly hours)

	Unpaid work		Paid work		Total work time	
	Females	Males	Females	Males	Females	Males
Argentina	43.0	17.6	15.6	34.0	58.5	51.6
Brazil	23.6	5.9	19.9	37.0	43.4	42.9
Chile	42.4	19.4	19.8	34.6	62.2	54.0
Mexico	54.1	19.5	20.5	44.9	74.6	64.4
Uruguay	36.3	16.0	21.8	36.7	58.1	52.7

Latin American countries analysed

Source: author's own elaboration. United Nations Economic Commission for Latin America and the Caribbean (ECLAC)

Mexico: INEGI, National Time-use Survey, 2014; Chile: INE, National Time-use Survey, 2015; Uruguay: INE, Uruguay Time-use Survey, 2013; Argentina: Module in the Annual Urban Household Survey, 2013; Brazil: Pilot survey in five states in Brazil, 2012

The most notable results of the Latin American studies are convincing and consistent with the evidence from other international time-use surveys (Rodríguez 2015), displaying the higher overall work load of women, the increase in the gender gap and the incidence of socioeconomic stratification (Cepal 2017a, 2016; Batthyány 2015a; Calero et al. 2015; Rodríguez 2015; Arriagada 2007).

The results in Table 11.2 show the greater overall work load of unpaid work and total time worked of women compared to men in the five Latin American countries analysed, widening the gender gap in those countries with a more unequal structure such as Mexico and Chile (UN 2005)³.

From 2000 onwards, transnational comparative studies have emphasised the relevance of completing the micro analyses with macrosocial approaches to understand the division of unpaid domestic and care work in the household (Amarante and Rossel 2017; Yu and Xie 2014; Lachance-Grzela and Bouchard 2010; Hook 2006; Fuwa 2004). Five essential dimensions are considered: (1) the level of gender equality; (2) the economic development; (3) the social and demographic structure; (4) the state policies related to gender equality and the welfare state; and (5) the cultural norms (Batthyány 2015b; Blofield and Martínez 2014; Lewis 2010; Arriagada 2007).

As regards the first dimension, gender equality is analysed by examining the opportunities, inequalities and discriminations on the grounds of gender in economic, work-related, social and political spheres. In this regard, as indicated by some research (Ferrant et al. 2014; Rizavi and Sofer 2010), in those countries in which the gender gap is wider, the role of the woman is usually limited to domestic and reproductive functions.

If the Gender Gap Index from the World Economic Forum (2018), Table 11.3, is used as a reference, it can be observed that the European countries have higher overall

³In the case of Brazil, it is important to highlight the undervaluing of the data referring to unpaid work; the data reveal approximately half the dedication of the other countries.

Table 11.3 Index of the Gender Gap of the World Economic Forum and sub-indices by dimensions

	France		Finland		Italy		Spain		UK	
	Sc	Po	Sc	Po	Sc	Po	Sc	Po	Sc	Po
Overall gender gap score	0.779	12	0.821	4	0.706	70	0.74	29	0.774	15
Indexes by dimensions										
Economic participation and opportunity	0.685	63	0.786	17	0.592	118	0.66	80	0.705	52
Educational attainment	1	1	1	1	0.995	61	0.99	47	0.999	38
Health and survival	0.974	78	0.977	60	0.969	116	0.97	93	0.97	110
Political Empowerment	0.458	10	0.519	6	0.267	38	0.35	24	0.421	11
	Argentina		Brazil		Chile		México		Uruguay	
	Sc	Po	Sc	Po	Sc	Po	Sc	Po	Sc	Po
Overall gender gap score	0.73	36	0.681	95	0.71	54	0.50	721	0.71	56
Indexes by dimensions										
Economic participation and opportunity	0.59	114	0.645	92	0.58	120	0.574	122	0.66	77
Educational attainment	0.99	63	1	1	0.99	37	0.996	58	1.0	32
Health and survival	0.98	1	0.98	1	0.97	59	0.979	50	0.98	1
Political Empowerment	0.35	23	0.101	112	0.35	24	0.335	27	0.21	54

Countries' scores (Sc) and positions (Po) in the ranking, 2018. European and Latin American countries analysed

The maximum value in the indices is 1 (parity) and the minimum 0 (disparity)

Source: author's own elaboration. World Economic Forum (2018)

gender equality than the Latin American countries. The exception is Italy which has the most disadvantaged position in the ranking of countries, alongside Brazil.

Furthermore, beyond the small differences in the positions occupied in the ranking, the indices in education and health-survival dimensions are high both in Latin American countries and in European countries (between 0.97 and 0.98) showing higher equality in both dimensions.

However, the most notable differences can be observed in the data relating to economic participation and opportunity, and political empowerment where Spain and, mainly Italy, reach similar values to the Latin American countries. These data are relevant if it is considered that the incorporation of women into the labour market and their economic and financial independence afford women better negotiation skills for an equal division of unpaid work (Amarante and Rossel 2017; Yu and Xie 2014; Lachance-Grzela and Bouchard 2010; Fuwa 2004). Therefore, the gender gap in the participation, salaries and presence of women in high socio-professional categories highlights this key aspect.

The detailed analysis of the results of the "economic participation and opportunity" dimension reveals that the participation rate of women in 2018 shows considerable differences between the regions that reach 12 percentage points between the countries with highest and lowest female labour participation; and within regions, since while in Europe a difference of 6 percentage points can be observed (48% in Finland compared to 42% in Italy), in Latin America this difference exceeds 9 percentage points. Thus, in Latin America, countries from the Southern Cone

(Argentina, Chile, Brazil and Uruguay) share a rate of more than 40% unlike Mexico, which can be partially explained by the fact that they are less traditional countries in their gender ideologies, and they have a greater presence of formalised jobs compared to informal employment (56.8% in the case of women in Mexico).

In turn, the part-time employment of men and women for 2018 shows significant differences between the participation rates of both sexes for all the countries considered in this study. In Latin America, Mexico is the country with the lowest part-time employment rate for men (17%), while Argentina is the country with the highest rate at 27% and also the highest female rate (51.3%) in the region. Mexico has the lowest female rate (33.2%), as a result of a large sector of informal work.

In Europe, greater heterogeneity can be observed in the distribution of part-time employment across countries, with Spain being the country with the lowest male rate (21.7%) and Finland the country with the highest rate (36.7%). The United Kingdom has the highest female rate at 57% and Spain has the lowest female rate at 40.9%. This distribution also highlights that while in Argentina the part-time employment rate is high, although different for men and women, in Spain said rate is low for both sexes.

This information is relevant as it illustrates significant differences between the countries which are associated with the welfare and gender models affecting them; the reasons for working part-time can be personal or structural, in other words, they can refer to the decision or need to work part-time for personal reasons (because of studies or reproductive responsibilities) or to the reduced contract hours applied by the employers, or to not finding a full-time position.

As regards political empowerment, in the countries analysed there is a quota law in the elections. For example, 40% in Spain and Chile (in the latter only in terms of female parliament candidates since 2017) and 30% in Argentina. However, taking these same countries, equality in political representation is far from being attained since the percentage of women in the parliament is 42%, 39.1% and 38.9% in Finland, Spain and Argentina, compared to 15.8% in Chile and 10.7% in Brazil. Although the percentages change between the countries when analysing the percentage of female ministers: 4% in Brazil, 17.4% in Argentina, 30.8% in Chile, 35% in Uruguay and 38.5% in Spain and Finland.

As regards economic development, the national income per capita in dollars (PPP) for 2018 estimated by the World Bank for the ten countries comprising the present research, shows a large difference both between the countries from Latin America and Europe and within regions. Thus, while Finland presents the highest income (\$47,820), followed by the United Kingdom (\$41,330) and France (\$41,070), countries from the south of Europe have considerably lower incomes, both Italy (\$33,560) and Spain (\$29,450). On the contrary, in Latin America the differences between the countries with the highest and lowest income are not as vast, although significant differences can nevertheless be observed; Uruguay has the highest income at \$15,650, and Mexico has the lowest (\$9180). Chile (\$14,670), Argentina (\$12,370) and Brazil (\$9140) are in between.

Although briefly, it is of interest to give an account of the sociodemographic structure of the countries in terms of their demographic transitions and ageing trends, and their relation with care work, which have been especially visible in Latin

America since the beginning of the 2000s. This evolution responds to the rapid reduction in fertility and the sustained decrease of mortality. “In the middle of the last century, the annual growth rate of the regional population was 2.8%, while at present it is only 1.2%” (Bárcena 2011).

Changes in the age structure of the population have major consequences on inequality in and between generations and on the analysis at hand in this research on reproductive and productive time.

Regarding the maternal mortality rate, significant differences can be observed between continents, since while none of the European rates reaches 10 out of 100,000, the Latin American rates exceed 50 out of every 100,000. These figures clearly show the effectiveness and reach of health policies, and the recognition of sexual and reproductive health rights. In addition, differences in the infant mortality rate are presented. Although the rates reduce if we compare them with the maternal mortality rate, there continue to be significant differences between continents. In Latin America the highest infant mortality rate is that of Brazil, standing at 13.2%, followed by Mexico (11.5%); compared to Chile (6.3%), Uruguay (7%) and Argentina (9.1%). In Europe the highest infant mortality rate is 3.7% and the lowest is in Finland, standing at 1.9%.

As regards fertility, it is important to point out that the differences reduce between continents since there is a general downward trend in the fertility rate and due to the ageing of the population. Thus, while none of the European countries exceeds a rate of 1.9 children per woman (France), others such as Spain hold the lowest fertility rate (1.3 children), and Latin American countries vary from 2.1 children in Argentina to 1.7 in Brazil.

From another perspective, if cultural norms are observed, an analysis of the indicators referring to the ideology and attitudes towards gender roles and stereotypes can be developed, using the World Values Survey (WVS) (Institute for Comparative Survey Research 2017), implemented homogeneously in all the countries studied (see Table 11.4).

The data show that, although gender inequalities continue to be forcefully expressed in gender values (ideologies, attitudes towards gender roles and stereotypes), some countries stand out beside others because of their specific perspectives in relation to some variables: in Finland it is considered that being a housewife is more satisfactory than having a paid job (82%), in Italy and Chile it is maintained that in a context of scarce positions in the labour market men should be more entitled to employment (39.8% and 41.9%), in Chile if the woman earns more than the man this can cause problems, (66.2%) and in Brazil it is maintained that when mothers work their children suffer (60.4%).

Lastly, although this chapter will not explore the state policies related to gender equality and the welfare state as they are the subject of specific chapters in this book, it is interesting to underscore the relevance of analysing whether the state acknowledges the existence of inequalities that call for different measures to be adopted according to sex to guarantee equality and the respect of human rights—such as legislation on violence against women and affirmative actions such as quota systems for women’s political participation—, as well as the implementation of labour policies based on equal opportunities and social policies supporting care (parental leave, flexible work hours, paid work at home).

Table 11.4 Opinions on aspects related to the ideology of gender, by country. World Values Survey (percentage of answers expressing agreement with the statement or neutrality)

	France	Finland	Italy	Spain	UK
When there is little work, men must have more right to a job	26.2	18.4	39.8	17.5	23.3
If a woman earns more than her husband, this will almost certainly create problems	–	–	–	25.0	–
When a mother does paid work her children suffer	–	–	–	28.5	–
In general, men are better political leaders than women	20.7	18.7	17.9	11.5	17.8
A university education is more important for a boy than for a girl	6.7	6.3	7.8	11.7	6.6
Being a housewife is almost as satisfying as having a paying job	50.0	82.0	49.8	49.5	59.7
	Argentina	Brazil	Chile	México	Uruguay
When there is little work, men must have more right to a job	29.5	26.8	41.9	29.3	32.5
If a woman earns more than her husband, this will almost certainly create problems	46.0	50.5	66.2	57.3	38.6
When a mother does paid work her children suffer	–	60.4	37.8	43.6	37.4
In general, men are better political leaders than women	27.5	28.4	28.2	23.0	9.1
A university education is more important for a boy than for a girl	16.6	9.4	20.9	20.7	9.7
Being a housewife is almost as satisfying as having a paying job	54.2	44.4	44.4	58.2	59.7

Source: author's own elaboration based on the sixth wave of the World Values Surveys. Argentina, 2013; Brazil, 2014; Chile, 2012; Finland, 2005; France, 2006; Italy, 2005; México, 2012; Spain, 2011; United Kingdom, 2005; and Uruguay, 2011. Inglehart et al. (eds.) (2014)

11.4 Comparative Analysis of the Gaps in Domestic and Care Work

This final part of the chapter presents a specific comparative analysis in relation to work times, reproduction and social inequality⁴. Specifically, and taking the previous sections as a reference, we will analyse the factors explaining the gender gap in the distribution of unpaid domestic and care work performed in their homes by dual-income heterosexual couples from Argentina, Chile, Spain and Uruguay. This will serve to further the comparative analysis of the individual and household

⁴The comparative empirical analysis presented is based on the research work published in Domínguez, M.; Muñiz, L.; Rubilar, G. (2019).

factors explaining the unpaid work gap; and to interpret the differences between the countries according to socio-political and cultural contexts.

In this regard, and following the contributions of Aguirre (2003) who—based on the works of Sarraceno & Sainsbury—, classifies states as familiarist (the responsibility of welfare falls to families and women) and as moving away from the family (domestic and care roles are drifting toward the state and the market), the countries examined in this section are characterised as familiarist, following the Mediterranean welfare model (Martinez and Voorend 2013). Moreover, in those countries with this welfare regime and with a scarce public services network, there continues to be a sexual division of work in which women are in charge of caregiving and domestic work (as well as providing income) and men are essentially dedicated to bringing in money through paid work (Blofield and Martínez 2014; Gálvez et al. 2010; Geist 2005; Kan et al. 2011). Furthermore, it has been observed that the widest gender gaps in unpaid work occur in the population with greatest socioeconomic vulnerability, where gender representations are more traditional and the pathway to adulthood is marked by early motherhood, a higher number of children, low education levels and a precarious and interrupted work history (Rodríguez 2015; Batthyány and Scavino 2017).

Argentina, Chile and Uruguay are market-centred countries, which, depending on the type of government, have sought to create laws that facilitate a change towards more equal and less familiarist models, with Chile being the most conservative (Midaglia and Antía 2017; Filgueira 2007; Blofield and Martínez 2014). Uruguay has made greater progress in legislation in general and particularly in legislation associated with family care leave (Blofield and Martínez 2014), but care strategies and the use of time still shows a sustained familialism, in other words, a familialism with reticent options and support from the state (Scavino 2017).

In Spain, Moreno (2007) highlights familialism as an underlying normative benchmark in the collective social imaginary and in institutional practice, although in recent years policies aimed at promoting female employment have been developed (longer maternity and paternity leaves and the granting of child benefit, aimed at working mothers). However, the consequences of the economic downturn (2010) were met with “austerity” in economic politics (reduction of salaries and public expenditure) and the slowing down of equality policies, in the context of a neoliberal political project, with the predominance of equal opportunities policies (Salazar 2016; Bettio et al. 2012; Karamessini and Rubery 2014).

In this context, the analysis of the microsocial factors in the explanation of the gender gap in domestic and care work can be situated in three theoretical perspectives.

First, the availability of time, based on the human capital theory and Becker’s family theory, which understands the division of unpaid domestic and care work as a rational allocation resulting from other demands on people’s time. Thus, people from the household contribute to the different activities according to their specialised skills, productivity and expected benefits. Therefore, the greater amount of time dedicated by women to domestic and care work, with a lower dedication to paid work, would be a consequence of men’s higher salaries, and women’s specialisation in this work (Davis et al. 2007; Gershuny and Sullivan 2003; Bianchi et al. 2000; Greenstein 1996).

The second theoretical perspective is that of relative resources, or the theory of economic exchange, which places us in a negotiation process between the members

of the couple, in which people's negotiating power depends on income, education and occupational prestige (Pinto and Coltrane 2009; Bernhardt et al. 2008; Knudsen and Wearness 2008; Mannino and Deutsch 2007; Fuwa 2004). Moreover, it is presumed that people will seek to minimise their time dedicated to domestic and care work, using any advantage of resources to better negotiate their absence from domestic and care work (Brines 1994; Deutsch et al. 1993; Coverman 1985).

Lastly, the gender relations perspective presents socialisation processes as an adaptation to the different socially constructed roles, expressed, for example, in the sexual division of work. Thus, gender is a behaviour conditioned by the social expectations and norms some people have of the behaviour of others (Killewald and Gough 2010; Gupta and Ash 2008; Davis et al. 2007; Gupta 2007; Fuwa 2004; Brines 1994). In this regard, several studies observe a positive relation between the egalitarian gender attitudes and roles of the couple and a fairer division of the domestic and care work (Kan and Gershuny 2010; Sevilla-Sanz et al. 2010; Treas and Drobnic 2010; Knudsen and Wearness 2008; Davis et al. 2007; Fuwa 2004; Parkman 2004; Greenstein 1996).

The main hypotheses of the empirical study related to the factors explaining the gender gap in domestic and care work, on a microsocial level, are:

Hypothesis 1. Women's relative resources will have a greater effect on the gap than those of men: reducing in those women with high relative resources (occupation, education and economic resources).

Hypothesis 2. The models and effect magnitudes of the variables explaining the gender gap will be different for women and men, indicating the relevance of the gender roles.

Hypothesis 3. The gender gap will be wider in those households with greater care needs; especially with the presence of children and dependent peoples.

On a macrosocial level, and from a comparative analysis of the countries analysed, *hypothesis 4* is that in those countries with less egalitarian gender values and where attitudes promoting the allocation of work according to gender relations persist, a wider gender gap will be observed.

The empirical analysis is conducted on the basis of surveys for each country which gather information about the use of time dedicated to work in the labour market, unpaid work and personal activities of the population (spanning over 12 years in Chile, over 18 years in Argentina; 10 years in Spain and 14 in Uruguay). Specifically, the analysis will examine data from the Time-use Survey which collected data through the application of a daily diary (INE, Spain 2011); those of the Module of Unpaid Work and Time Uses from the Annual Urban Household Survey (INDEC, Argentina 2013)⁵; those of the Time-use Surveys of Chile and Uruguay (INE, Chile 2016; INE, Uruguay 2013). In these last three cases, the survey is based

⁵The Argentinian survey is the only one that is a module added to a regular survey, where questions about paid work are included. In addition, it also includes a list of activities of limited unpaid work. A first block is dedicated to unpaid domestic and care work, including domestic chores; looking after children, sick people or adults in the home; and activities dedicated to school and/or learning support for members of the household.

on a list of activities predefined in the Classification of Time-use Activities for Latin America and the Caribbean (CAUTAL), which uses the International Classification of Activities for Time Use Statistics (ICATUS) as a reference, which was used in the Spanish survey.

Since two different tools are used to collect information—a time-use diary and a list of activities—(Carrasco and Domínguez 2014) and to increase the comparability of the surveys, the analysis focuses on the gender gap in the distribution of domestic and care work between both components of the couple: the chief female and male person. Thus, the dependent variable is the contribution of each member of the couple to the total domestic and care time dedicated in the home, on a typical day, for the two main people: calculating first the total time both people dedicate to the household, and then the proportion carried out by each member.

Lastly, it is important to point out that the analyses are conducted for dual-income heterosexual couples since it is considered that it is these couples in which both members have resources for intra-family negotiation and are more egalitarian in terms of gender mandates regarding women and the labour market (Ajenjo and García 2011; Daly 2011; Gálvez et al. 2010; Kan et al. 2011; Sayer 2010; González and Jurado 2009). The final sample, made up of households of dual-income couples, is 5730 households in Argentina, 1671 in Chile, 1771 in Spain and 966 in Uruguay.

As regards the data analysis techniques, a linear regression model is formulated for each country, in which the independent variables implement the different micro theories presented above: (i) those variables that provide information about the relative resources of women and men: age, education level, socio-professional category and personal income; (ii) the time dedicated by women and men to paid work, and the total time dedicated by the couple to domestic and care work; (iii) characteristics of the household and care needs (type of household according to the presence and age of minors, number of minors and domestic service). In the regression models, one per country, both quantitative and qualitative variables, transformed into *dummy* variables, are used.

11.5 Analysis Results

The first general results (Table 11.5) show, for all the countries, a greater overall workload for women, with Argentina being the most unequal country in the relation between men and women. Specifically, for unpaid domestic and care work, in Spain the ratio between men and women is lower, followed by Chile, Uruguay and, lastly, Argentina where the time gap is wider. This highlights the considerable feminisation of unpaid work, and, on the contrary, women's lower participation in paid work in the four countries, with the differences in Argentina being more critical in descriptive terms⁶.

As regards the empirical evidence that is most relevant to this work, first (see Table 11.6), the results about the explanatory capacity of the models show that the

⁶This result may be due to the Argentinian survey not collecting information about time if dedication did not reach a minimum of 1 h daily. This under-recorded the declaration of care work by men.

Table 11.5 Paid work, domestic and care work, and overall work load in Argentina, Chile, Spain and Uruguay

Variables of the main people in the household	Argentina N = 5730 households				Chile N = 1671 households				Spain N = 1717 households				Uruguay N = 966 households				
	Women		Men		Women		Men		Women		Men		Women		Men		
	X	S	X	S	X	S	X	S	X	S	X	S	X	S	X	S	
Daily hours of (1):	paid work	6.80	3.30	9.31	3.20	7.52	3.49	9.71	3.19	7.02	2.01	8.52	1.91	6.38	3.85	8.31	3.94
	domestic/care work	6.13	4.39	2.38	2.97	6.11	4.11	2.90	2.79	4.12	2.49	2.00	2.01	5.19	3.76	2.41	2.90
	domestic work	3.49	1.96	1.26	1.48	4.28	2.68	1.86	1.90	3.14	2.02	1.42	1.62	3.74	2.62	1.58	2.00
	care work	2.63	3.52	1.13	2.24	1.83	2.71	1.04	1.69	0.98	1.62	0.58	1.13	1.45	2.60	0.83	1.90
	overall work load	12.93	5.06	11.69	4.21	13.64	4.83	12.61	4.05	11.14	2.74	10.51	2.49	11.57	4.91	10.72	4.52
Ratio Women/Men	paid work	0.73				0.77				0.82				0.77			
	domestic/care work	2.57				2.11				2.06				2.15			
	domestic work	2.78				2.31				2.21				2.37			
	care work	2.34				1.76				1.70				1.74			
	overall work load	1.11				1.08				1.06				1.08			
Household variables	Argentina		Chile		Spain		Uruguay		Spain		Uruguay		Uruguay				
	X	S	X	S	X	S	X	S	X	S	X	S	X	S	X	S	
Total daily hours of domestic and care work performed by the main people of the household (1)	8.51	6.19	9.01	5.61	6.12	3.55	7.70	5.49									
Ratio of domestic and care work women/total	0.76	0.22	0.69	0.21	0.69	0.24	0.70	0.25									
Ratio contribution to income women/total income	0.41	0.17	0.37	0.18	0.44	0.10	0.40	0.19									

Sample: households composed of couples employed in the labour market and receiving a salary. (1) Social time: average and standard deviation of daily hours
 Source: author's own elaboration based on the Time-use Survey from Spain, INE (2011); the Unpaid Work Survey from Argentina, INDEC (2013) and the Time-use Survey from Chile, INE (2016). The analysis for Uruguay have been carried out by Sol Scavino (Universidad de la Republica, Uruguay) on Time-use Survey from Uruguay, INE (2013)

Table 11.6 Linear Regression Models (OLS) for Argentina, Chile, Spain, and Uruguay. Gender Gaps in Non Paid Domestic and Care Work (NPDCW)

	Argentina			Chile			Spain			Uruguay		
	Non-standardised coefficient		Standardised coefficient	Non-standardised coefficient		Standardised coefficient	Non-standardised coefficient		Standardised coefficient	Non-standardised coefficient		Standardised coefficient
	B	Standard error	Beta	B	Standard error	Beta	B	Standard error	Beta	B	Standard error	Beta
(Constant)	89.287 ***	1.949		79.773 ***	8.304		86.124 ***	8.737		91.886 ***	6.975	
Total hours of DCW	-1.007 ***	0.024	-0.282	-0.203 **	0.095	-0.053	-0.84 ***	0.122	-0.126	-0.262 **	.111	-0.054
Income (log.) pfm	-2.457 ***	0.208	-0.093	-1.618 ***	0.639	-0.079	-6.829 ***	1.229	-0.127	-3.605 ***	.708	-0.129
Income (log.) pmm	(2)		0.009(1)	(2)		0.029(1)	(2)		-0.022(1)	(2)		0.047(1)
Hours paid work pfm	-0.914 ***	0.046	-0.136	-0.586 ***	0.167	-0.098	-1.525 ***	0.213	-0.13	-0.510 **	.164	-0.077
Hours paid work or pmm	0.941 ***	0.043	0.136	1.071 ***	0.159	0.164	2.099 ***	0.222	0.16	1.216 ***	.147	.185
Age pfm	0.304 *	0.194	0.016	0.208 **	0.093	0.116	(2)		0.040(1)	.179 ***	.053	.077
Age pmm	1.25 ***	0.218	0.061	(2)		-0.077(1)	0.45 ***	0.059	0.156	(2)		-0.002(1)
[Educational level pfm high]												
Educational level ppf basic	2.252 ***	0.487	0.04	(2)		0.014(1)	(2)		-0.023(1)	(2)		0.024
Educational level ppf medium	1.946 ***	0.341	0.042	(2)		-0.006(1)	(2)		-0.005(1)	(2)		0.002
[Educational level ppm high]												
Educational level ppm basic	1.835 ***	0.367	0.036	4.936 ***	1.59	0.09	5.584 ***	1.549	0.081	(2)		0.036
Educational level ppm medium	(2)		0.004(1)	5.137 ***	1.188	0.123	5.29 ***	1.161	0.111	(2)		-0.02
Socioprofessional category pfm 1	(2)		-0.005(1)	(2)		-0.008(1)	-2.123 **	0.976	-0.04	(2)		-0.028

Socioprofessional category pfm 2	(2)	0.000(1)	(2)	-0.009(1)	(2)	1.164	***	0.108	(2)	-5.726	***	1.357	-0.096
Socioprofessional category pfm 3	-1.856	***	0.343	(2)	-0.005(1)	(2)		0.006(1)	(2)				0.004
Socioprofessional category pfm 4	(2)	0.008(1)	(2)	-0.005(1)	(2)			-0.005(1)	(2)				0.018
[Socioprofessional category pfm no qualifications/not classified]													
Socioprofessional category pmm 1	-2.67	***	0.736	-0.044	(2)	5.649	***	1.164	(2)	0.108	(2)		-0.029
Socioprofessional category pmm 2	-6.17	***	0.739	-0.096	(2)	0.034(1)	(2)		0.005(1)	(2)			-0.037
Socioprofessional category pmm 3	-4.042	***	0.726	-0.062	-4.01	***	1.467	(2)	-0.066	(2)			0.028
Socioprofessional category pmm 4	-2.889	***	0.655	-0.065	(2)	0.015(1)	4.1	***	0.929	0.08	3.683	**	1.161
[Socioprofessional category ppm no qualifications/not classified]													
Couple with a child of 0-4 years	8.192	***	0.574	0.158	(2)	3.802	***	1.275	0.071	(2)			-0.012
Couple with a child of 5-9 years	8.254	***	0.552	0.15	(2)	5.917	***	1.286	0.094	(2)			0.013
Couple with a child of 10-19 years	6.686	***	0.48	0.134	(2)	4.802	***	1.179	0.087	(2)			0.032
Couple with a child of +19 years	5.95	***	0.547	0.083	(2)	7.159	***	1.56	0.095	(2)			-0.016
Couple with others + 19 years	3.279	**	1.37	0.015	(2)	-0.016(1)	(2)		-0.005(1)	14.752	***	4.327	.076

(continued)

Table 11.6 (continued)

	Argentina			Chile			Spain			Uruguay		
	Non-standardised coefficient		Standardised coefficient	Non-standardised coefficient		Standardised coefficient	Non-standardised coefficient		Standardised coefficient	Non-standardised coefficient		Standardised coefficient
	B	Standard error	Beta	B	Standard error	Beta	B	Standard error	Beta	B	Standard error	Beta
[Household with a couple only]												
[Contribution to the household income M = W]												
Contribution to the household income W > M	2.669 ***	0.515	0.053	-3.15 **	1.353	-0.06	-2.204 *	1.313	-0.03	(2)		-0.007
Contribution to the household income W < M	3.435 ***	0.483	0.074	(2)		-0.011(1)	(2)		-0.003(1)	(2)		0.002
Number of minors in the household	0.692 ***	0.14	0.042	(2)		0.026(1)	(2)		0.027	(2)		0.035
[No paid domestic and care work in the household]												
Paid domestic and care work in the household	2.777 ***	0.501	0.036	(2)		-0.019(1)	1.696 *	1.145	0.026	(2)		-0.004
F Statistic (df)	180.689 (23)			17.05 (10)			41.006 (17)			24.969 (8)		
Adjusted R2	0.146			0.089			0.165			0.093		

* P -value <0.10; ** P -value <0.05; *** P -value <0.01

(1) For the non-statistically significant variables, the standardised regression coefficient is the “beta in”

(2) Non-statistically significant variables with a value $-P > 0.10$. These variables are excluded from the model

Sample: households made up of couples, employed, who receive a wage for this work

pmm = principal male member of the household; pfm = principal female member of the household [category of the variable omitted]

Source: author’s own elaboration based on the Time-use Survey from Spain, INE (2011); the Unpaid Work Survey from Argentina, INDEC (2013) and the Time-use Survey from Chile, INE (2016). The analysis for Uruguay have been carried out by Sol Scavino (Universidad de la Republica, Uruguay) on Time-use Survey from Uruguay, INE (2013)

relative resources of men and women and their impact on the negotiation capacity within the household have a limited effect on understanding the gender gap in the distribution of time-use in unpaid work.

Moreover, if the differences between countries are analysed, the hierarchy and magnitude of the most relevant factors explaining the gap between men and women, is notable. Thus, in Argentina, the total hours of domestic and care work performed by the main people in the household have a greater impact on the gender gap: the more hours of total dedication, the more the inequality in the distribution reduces. On the contrary, in Chile, Uruguay and Spain, men's dedication to paid work is the variable which best explains the gender gap: the availability of male time is an important factor for understanding the phenomenon.

These first results show the relevance of the interrelation between the work times (paid and unpaid) to understand the gender gap in domestic and care work; affecting women and men differently. Both in the case of women and men, increasing their hours of dedication to paid work means reducing the time dedicated to domestic and care work. However, in terms of inequality, this occurs in a different way since the effect of the increase in men's dedication to paid work on the gender gap in unpaid work has an amplifying effect on inequality that is much greater than the reducing effect observed when the woman increases her dedication to the labour market.

Furthermore, women's economic income has been one of the factors most examined in the literature, with some contradictory results being highlighted in several studies. In the empirical work conducted, the results are evident: the higher women's salary income, the lower the inequality. On the contrary, if the analysis focuses on women's economic contribution to the economic income of the household, a greater contribution from women has a significant effect in Spain and especially in Chile: reducing the gender gap in unpaid work. However, in Argentina, households that are more egalitarian in the distribution of domestic and care work are those where there is greater salary equality. Contrary to that set out by the theoretical perspective of relative resources, this situation may reveal the lower negotiation capacity of Argentinian women and the strength and influence of gender norms and values on the distribution of work in the households. In less egalitarian contexts in terms of gender ideologies, those women who transgress them through their earning capacity in the labour market strengthen their female gender role in the household, and, therefore, assume more unpaid work, as a way of compensating for their transgression of social and cultural gender values.

The analysis of the effects of educational levels and the socio-professional categories of women and men on the gender gap in domestic and care work shows highly diverse and variable results between countries, confirming that indicated by previous studies (Knudsen and Wearness 2008; Fuwa 2004).

Thus, as regards education levels, if the emphasis is placed on women, it can be observed that it is only in Argentina where a higher educational level means a reduction in inequality. On the contrary, in the other countries, the dominant effect is men's education level: their low education levels intensify the inequalities between women and men.

A similar approach provides us with the results from the socio-professional categories: a greater explanatory capacity of the situation of men, especially in

Argentina, where men from all socio-professional categories, compared to unskilled men, show a lower inequality in the distribution; especially in the categories of mid-level technicians, office employees and employees in the services and commerce industries. This last category (service and commerce employees) is the only category that has a reducing effect on inequality in Chile. In turn, in Spain, the categories of managers and high-level technicians and skilled workers show a significant effect on an increase in inequality.

In the case of women, the socio-professional category shows more unstable and inconsistent results: with no significant effect in Chile; lower inequality in higher categories in Spain and Argentina (legislative and judicial power; manager and technician, professional and scientific); and in female mid-level technicians and administrative and office employees in Uruguay.

Lastly, as regards the household variables, the presence of minors in the household is one of the most critical situations entailing an increase in the care needs in the household and the establishment of family strategies to meet these needs, particularly when the children are aged below 9 years of age. The results observed, taking as a reference households of couples without other people, show that Chile and Uruguay have a totally different pattern: the presence of minors in the household, regardless of the age, increases the hours dedicated to care work but it does not have a significant effect on the distribution gap of domestic and care work of men and women, without modifying the inequality pattern in dedication. In turn, the Argentinian and Spanish cases reveal much more unequal situations: with the presence of minors aged less than 4 and up to 9, the increase in the dedication time means that women assume a greater load of this work, and consequently gender inequalities increase.

In this regard, it is important to point out that the maintenance of inequality in the household between the two main people, female and male, depending on the presence of minors, may be due to the role of people outside of the household; especially of grandmothers and grandfathers or external services, when the households can afford it.

Regarding this last point, when part of the domestic and care work is performed by another person (mainly a woman) as a paid job, part of the work performed by men is reduced, but not the work assumed by women. Women probably reduce part of the domestic and care work, the most routine and easily outsourced, but they manage, organise and “are alert” to tasks and care. Therefore, paid domestic work either has no effect on the gender gap in Chile and Uruguay, or it increases the inequality between men and women (Argentina 1.7 and Spain 2.7).

11.6 Conclusions

At the beginning of the chapter we highlighted the need to broaden the operational definition of the theoretical constructs of work and times, incorporating measures that embrace the multi-dimensional nature of these concepts and the dualities affecting them. This broadening would help, first, to incorporate gender relations and

values, into the analysis of gender gaps in productive and reproductive time-use. Second, it would also mean relevant progress in the recognition of inequality processes, highlighting the suitability of opening up the analysis towards the great absentee of care work, the male gender, and the permanence of other axes of inequality and social stratification in care time.

The analyses conducted help to observe, on a comparative level in Europe and Latin America, that, although a reduction has been detected in gender differences in time-use over the past 50 years, as a result of more women dedicating increased time to paid work and more men dedicating increased time to domestic and care work, the gender segregation in relation to domestic work persists.

The models considered in the four countries analysed to give an account of the gender gap in domestic and care work show the low incidence of those variables which have been considered in the contributions of "relative resources": women's education levels, socio-professional categories and economic resources. These results are consistent with that indicated in other comparative studies regarding the weakness and inconsistency of relative resources in the negotiation capacity in the distribution of time dedicated to unpaid care work. Moreover, said relative resources have different magnitudes and effects according to whether they are men's or women's.

In the case of women, their participation in paid work and their economic income are relevant factors for reducing the inequality gap. Therefore, it is unquestionable that the elimination of economic inequalities is a relevant element in overcoming the gender gap in unpaid work.

This result serves to verify the association between the socioeconomic stratification of women and gender relations.

On the contrary, men's relative resources, their education level and socio-professional category, are more consistent and of a larger magnitude, especially in Latin American countries. This may reflect the greater diversity of male gender ideologies and values, and a greater effect of male socio-economic stratification on the gender gap: their relative positions have a greater impact on their dedication to domestic and care work, and consequently on the distribution of time in the household.

Therefore, the inequalities in the social relations of production intersect with the maintenance of relations of gender inequality. Consequently, women from popular classes and more disadvantaged households assume greater inequality in unpaid work in households.

This weakness of relative resources, as a negotiation capacity, in the understanding of the processes underlying gender gaps, is accompanied by the relevance of the gender ideologies, roles and attitudes underlying the sexual division of work and the gender gap in the carrying out of domestic and care work. In the Latin American countries, androcentric cultural and social norms and values persist to a greater extent, and men and women continue to be assigned to jobs according to gender relations. In this regard, the results all reveal the need to incorporate the gender ideology and contextual elements in the explanation of the gender gap in households. In other words, accompanying the time-use surveys with qualitative studies

or with questions, included in the surveys, which serve to gather information about the social representations of gender and care.

Likewise, the importance of the interrelation between times is notable. In all the countries, the greater dedication of men to work in the labour market does not only mean a reduction in their domestic and care work, but, as a consequence, women either have to reduce their dedication to the labour market to assume the reduction in men's work in the household, or outsource part of it. Therefore, the availability of time and its effect on the gender gap in the domestic and care work load, and the overall work load, fit in with the male strategy, but not the female, which responds more to the care needs of the household.

To conclude, the empirical results reaffirm that women dedicate time to domestic and care work in accordance with the care and welfare needs of the people in the household. The gender gap is sensitive to this and shows that female time is the adjustment variable, with consequences on the quality of life and welfare of women. And male time is the key factor to achieve equity in work times.

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Chapter 12

Recent Evolutions of Gender, State Feminism and Care Models in Latin America and Europe



Julie Jarty and Karina Batthyány

Abstract This chapter presents and characterises the way in which, in the twenty-first century, after years of feminist struggles inside and outside of institutions, gender relations are organised in the different countries of the INCASI project (on the European side, Spain, Italy, Finland, France and the United Kingdom, on the side of the South American Southern Cone, Argentina, Brazil, Chile and Uruguay). It pays special attention to the implementation of feminist issues on political agendas, and in particular the assignment of women to unpaid care work—an aspect of the power continuum that we look to relate to other aspects. Gradually and for almost a century all countries in both continents have granted women the status of subjects, citizens and employees. However, the conditions, challenges and timelines of this process differ considerably from one continent to another, so they need to be addressed separately. The neoliberal era did not have the same impact in Europe as it did in South America (nor was it exactly the same between particular European countries or among South American ones).

Keywords Gender · State feminism · Care work · International comparison

12.1 Introduction

In a worldwide context of social crisis of capitalism (Fraser 2013), big questions are arising on both sides of the Atlantic and the equator: on the one hand, was the expansion of the Welfare State in Europe, commonly viewed as favourable to access

J. Jarty (✉)

Centre d'Etude et de Recherche Travail Organisation Pouvoir, Toulouse Jean Jaurès University, Toulouse, France
e-mail: jarty@univ-tlse2.fr

K. Batthyány

Departamento de Sociología, Universidad de la República, Montevideo, Uruguay

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by women to social citizenship, interrupted by the 2008 financial crisis and the subsequent austerity policies? On the other hand, did the fragility of the ‘turn to the left’ (the ‘Pink Tide’) in South America only lead to a marginal stabilisation of state feminism that could specifically and sustainably improve the everyday lives of women?

We take note of the feminist criticisms of the Welfare States that came about in the 1990s (Pateman 1988; Lewis 1992; Orloff 1996). This chapter shows how gender is a relevant category of analysis in order to understand social welfare systems and the way they have evolved in the neoliberal era. In the face of the mainstream of “androcentric and falsely universalizing” comparative approaches (Orloff 2009), we reveal the economic and social contribution by women in the era of financial capitalism and the subsequent disruption of social (and family) solidarity. The idea is therefore to understand how the nine Welfare States in the INCASI project countries are working (or not) to recognise this contribution and potentially transform it towards more gender equality. In doing so, the aim of this chapter is to contribute to a better understanding of how gender continues to influence and shape modern social welfare systems, and, in turn, how the intensification of neoliberal policies is transforming gender relations and feminist concerns. To do so, we recur here to European and contemporary feminist literature, in order to put these matters into perspective.

Considering each of the nine INCASI countries, this chapter is structured into three parts: the first traces the emergence of women’s rights and state feminism in the different European and Latin American countries studied; the second re-examines the gender ‘contracts’ or ‘regimes’ resulting from the degree of ‘defamilialisation’ and social organisation of care, i.e. the state measures adopted (or not) to free women from the domestic and family duties that are still a female prerogative. The third part looks at the consequences for gender in contexts of crisis and conservative decline (austerity and right-wing populism, among others), in order to better understand contemporary gender issues.

12.2 State Feminism

The 1990s brought a milestone for the institutionalisation of feminism both in Europe and in South America. The defence of women’s interests (viewed as a social category) was granted the status of a major political issue in certain public and especially international institutions. On the back of the UN’s recommendation in 1975, the European Union (EU) adopted specific structures and ordered its Member States to adapt their legislation to the imperative of gender equality—an imperative that was highly focused on the economic goal of increasing the participation of women in formal, salaried labour. Later, the preparations for the World Conference on Women in Beijing (1995), at which European feminists were highly active and where ‘gender mainstreaming’ was formalised, had a direct impact on the ‘global south’.

This ‘state feminism’, though variable between countries, was characterised, first, by the creation of specialised public departments and then by the setting of quotas to facilitate access by women to positions of power. In addition to this

state-centric turn in feminism, there was also a major process of ‘NGO-ization’ (Mendoza 2014), which involved state collaboration with militant NGOs with support from international donors. And on both sides of the Atlantic, feminist movements integrated international institutions to intervene as promoters or supervisors of new policies to reduce gender inequalities.

However, state feminism did not lead to full adherence of the feminist movement. Nor did it lead to the same dynamics, nor to the exact same consequences in the two studied continents. And its degree of implementation in different countries says something about the state of gender relations, in particular, in relation to the analysis of state regulation of care.

12.2.1 Woman-Friendliness of (EU) Institutions after the Second Feminist Wave: Truths and Myths

In the industrialised countries of the north, the second half of the twentieth century is often presented as a historic moment for feminism, known as the ‘second wave’. In parallel to the transformation of the labour market and the advent of paid labour as the dominant form of employment, women took to the streets demanding access to political, social and economic citizenship. They were established in and outside of institutions and contributed to major legislative advances, cleansing legal systems of their most discriminatory characteristics and formally guaranteeing freedom and autonomy of women as citizens in every right. The regulation of divorce¹ and the right to abortion², perceived as necessary requirements for any emancipatory life project, were symbols of the gradual incorporation of gender relations in democratic law.

Of the five European countries studied, only Spain, strangled by General Franco’s dictatorship until 1975, would not witness this second feminist wave until later³. This dark side of Spain’s recent history probably partly explains why the institutionalisation of feminism generated less scepticism within the women’s movement than in other countries (Lombardo 2017). For another reason, the Nordic countries of Europe, such as Finland, also developed a positive view of state feminism, which allowed them to achieve a high level of gender equality through the state. In contrast, Italian, French and British feminist movements were more critical of state feminism, emphasising the risks of appropriation and de-politicisation of feminist

¹In 1969 in the United Kingdom, in 1970 in Italy, in 1975 in France and in 1981 in Spain.

²In 1967 in the United Kingdom, 1969 in Finland, 1975 in France, 1978 in Italy and 2010 in Spain respectively.

³Two other southern European countries were under military dictatorships that delayed the transition to modernity and the changes that revolutionised the role of women in society: in Portugal, the long Salazar dictatorship (1926–1974) and in Greece, the so-called Regime of the Colonels (1967–1973).

issues, and the co-optation of other interests such as the defence of the liberal economic model.

The European Union played a central role in the institutionalisation of feminism, beginning in the 1960s and 1970s. Progressively encouraged by international recommendations in favour of women, European states explicitly appealed to feminists to reform the law and institutions. The 1995 Beijing World Conference was a turning point for putting feminist issues on the international agenda, particularly with respect to the application of gender mainstreaming. It should be noted, however, that in most countries, historically left-wing governments were the most receptive to this call and are the ones that offer most windows of opportunity in this regard. In Spain, the return to democracy and a left-wing government from 1982 led to the inclusion of feminist issues on the political agenda: the *Instituto de la Mujer* (Women's Institute) was created in 1984. It would not be until the left returned to power, twenty years later, that the *Secretaría General para la Igualdad* (General Secretariat for Equality) was created, which became a ministry in 2008. Similarly, in Italy, the centre-left governments of the 1980s and 1990s were the only ones to suggest a more favourable context for the institutionalisation of feminism, despite the fact that the country was struggling to recover from the backlash that followed the women's movements of the 1970s (Faludi 1991). Successive equal opportunity ministers, Finocchiaro, Balbo and Belillo of the Prodi, Alemá II and Amato II governments, for example, re-established relations with the feminist movement and opened opportunities for feminist activists to enter the institutional scene (Lombardo and Sangiuliano 2009). On the contrary, the arrival of model and show girl Carfagna in the same ministry in 2008, a member of Berlusconi's liberal and conservative government, marked a new break from the militant base (Lombardo and Del Giorgio 2013). In France, since the creation of the *Secrétaire d'État à la Condition Féminine* in 1974, all governments had a ministerial position dedicated to women's rights—although not always an entire ministry. The State also created central and decentralised services specifically for women, and is developing a public action to promote gender equality (Dauphin 2010). In Finland, social democracy and the advanced development of the Welfare State that is so typical of Nordic countries favoured state feminism, promoting a shift from *an equality in right* to a *de facto equality*.

12.2.2 State Feminism under (UN International) Control in Latin America

Due to the omnipresence of dominantly colonial relations even in the production of knowledge (Hill Collins 1990, 2000), the notion of the 'second feminist wave' that sparked state feminism, is falsely universal. This 'wave' did not echo the same way in Latin America and particularly in South America. Moreover, state feminism is poorly documented in South America, as noted by Magalhaes and San Romanelli (2017). In fact, it is not at all easy to comprehend the processes by which feminism

has been institutionalised in Latin American countries, and especially in comparison with Europe.

It is important to note that, at a time when most European countries are entering a democratisation phase in terms of gender relations, the four countries studied here all sank into military dictatorships at the same time. These dictatorships prevented militant expressions and sustainably changed the priorities and goals of the feminist cause⁴. Of course, although women had acquired certain rights before the military coups, the position of feminist issues on political agendas is closely linked to the specific context of the end of those military dictatorships (1983 in Argentina, 1985 in Brazil and Uruguay, 1990 in Chile). The arrival of the new democracies created a particularly favourable context for the politicisation of gender issues, helping both to put feminist opinions on the national political agenda and, on a more institutional level, possible recommendations and partnerships with the UN and its specific agencies such as UNIFEM and ECLAC. This phenomenon was particularly characterised by the specific work of feminists within NGOs, study centres, university spaces, and national and transnational networks, and which played a role in raising awareness and monitoring of state institutions and affairs.

This progressive institutionalisation of gender issues would lead, in three of the four studied countries, to the election of women to the highest state positions during the so-called 'Pink Tide': Chilean Michelle Bachelet in 2006 and again in 2014, Argentinian Cristina Fernández de Kirchner in 2007 and Brazilian Dilma Rousseff in 2010 (re-elected in 2014 until the coup d'état of 2016). On the contrary, it should be noted that in the European countries that are part of the INCASI project, only Finland and the United Kingdom have had women occupy this symbolic position, respectively with the election of Democrat Tarja Halonen in 2000 and 2006 and (more atypically because they are ultraconservative and liberal) Margaret Thatcher in 1975 and Theresa May in 2016. Although this way of affirming the voice and presence of women in the public sphere is not, as such, a guarantee of state feminism, it is derived very directly from it: for the British sociologist Sylvia Walby, it is an indicator (among others) of democracy (Walby 2009). On a less emblematic level, the South American state-centric turn was characterised by the integration of feminist women in institutional arenas, whether national or international. This phenomenon in relation to the state-centric turn is still highly controversial in feminist thinking. It generated a flourishing of feminist scientific production on the part of Latin intellectuals, with their critical and decolonial tradition. So, following on from Aníbal Quijano, author of the notion of 'coloniality of power', Breny Mendoza introduced the notion of 'coloniality of democracy' (Manrique 2019) which is reflected in the absence of poor women, and of women from traditions linked to native, Afro or mestizo peoples, with little access to formal education and health. Marielle Franco, the "black feminist woman and daughter of the favela" as she defined herself, city councillor in Rio de Janeiro, Brazil, was a symbol of the

⁴Fights against social inequalities and poverty, but also calling for an account of the prisoners who disappeared during the dictatorship (the Plaza de Mayo campaign by mothers in Argentina, for example) were a huge specific feminist challenge.

possible transformation of state feminism and its opening up to minorities. In turn, her assassination can be viewed as a brutal backlash, a symbol of violence and the appropriation of power by the dominant groups.

The first demands of state feminism were partly similar to those of the second feminist wave in Europe, revolving around the issues of politicisation of private life, in particular: (1) criticism of the assignment of domestic and care work to single women, (2) demands for reproductive and sexual rights, and (3) the fight against gender violence, following on from the goals of the Beijing conference. However, even more than in the European countries studied here, these matters have yet to be fully applied to politics. First of all, in terms of reproductive rights, only Uruguay achieved the decriminalisation of medical abortion in 2012, while all the European countries have legalised it⁵. Similarly, the institution of marriage is still limited to same-sex couples in Brazil (where there is, however, an alternative form of civil union) and in Chile—this is also the case in Italy (Spain, Finland, France and the UK have recognised same-sex marriage, although at different times and not without heated debate). Secondly, the gender gap in the distribution of productive and reproductive work between men and women is another complex issue because it depends so largely on the consolidation of the Welfare State and its social protection systems, key components of idealised state feminism (following the example of the Nordic countries). And in this respect, the academic literature is often sceptical about the very use of the notion of the Welfare State in application to Latin America (Martínez Franzoni 2008). Of the four INCASI countries, only Argentina and Uruguay have intensified their social welfare systems.

Finally, in both continents, state feminism is established in a context of a deteriorating labour market with extremely tangible consequences for women: plans for economic emancipation through paid employment are being implemented at a time when women are realising that they will never experience the same benefits of employment that men may have done during the period when capitalism was expanding (Le Feuvre 2018). The issue of job insecurity (especially in Europe) and poverty (especially in Latin America) will become central concerns for state feminists, especially with regard to the following interrelated phenomena: the increase in the number of divorces and separations and, therefore, women at the head of single-parent families; the increase in the number of women working for a salary outside the home; the maintenance of the sexual divide in terms of unpaid work at the expense of women; the emergence of a childcare crisis; and the ‘birth strike’. The possibility of a Social State means we can expect women’s social welfare, living and working conditions to improve. However, reforms to social protection systems and the consideration of gender as a structuring principle thereof will not

⁵Access to abortion rights in the European INCASI countries should not hide the fragility of this legacy (for example, it was directly questioned in Spain in 2014), the discrepancies between the law and its application (in southern Italy, for example, it is almost impossible to get an abortion) and regional disparities (in France, long waiting lists do not allow all women to get an abortion within legal deadlines).

occur in the same way in countries with very different political traditions and social emergencies.

12.3 Gender and Welfare State Systems

Despite the shared legacy of the Male Breadwinner/Female Carer model and the widespread appearance of the Adult Worker (or Dual Earner) model, all countries are organised on the basis of very different principles, as well as very different national architectures in terms of gender equality. Within the diversity of countries of the European Union and Latin America in the INCASI project, we can identify very different ‘gender regimes’. So, our comparison could easily fall into the trap of what Oinonen and Tervonen-Gonçalves (2019) identified as a North-South dichotomy: on the one hand, the ‘modern/advanced/superior students’ (such as Finland, one of the so-called ‘women friendly’ Nordic states), and on the other hand, the ‘bad students’ (such as Italy and Spain, whose structures have traditionally been regarded as more patriarchally rooted). Adding Latin American countries (Argentina, Brazil, Chile and Uruguay) to our comparison could further intensify the risk of enclosing countries in biased, hierarchical classifications, since their transformation of gender issues into policy does not follow the same agenda as the European Union. Due to these very different reputations emanating from the dominant discourses, we prefer to use comparison to show the complexity, in a neoliberal context, of the transition from the Male Breadwinner/Female Carer model to the Adult Worker one.

12.3.1 *Variations and Trends in European Union Care Regimes*

Finland has a social democratic model with a typically Scandinavian universalist welfare state, associated with generous social benefits (for example, in terms of public childcare services, paid parental leave and care rights) and a system of high taxes (Korpi 2000). It has a strong tradition of state feminism, as it is part of the (controversial) ‘Nordic Nirvana’ myth in terms of equality. The country developed universal childcare services from the 1960s and 1970s, as well as a culture of ‘state motherhood’ that greatly supports the full-time employment of women (Pfau-Effinger 2004). Passed in 1973, the Childcare Act regulates the care of young children and provides programmes outside the education system for children under 7 years of age. Its 1985 reform was accompanied by a subsidy for homecare by parents. The Childcare Act was strengthened in 1996 when the right to municipal care services became a legal right for all children. Due to these extensive national policies, the impact of the European Union has been limited in most cases. However, Finland’s ‘women friendly’ Welfare State has always been weaker than those of

other Scandinavian countries (such as its neighbour Sweden). So-called ‘cash for care’ policies in the 1990s were mainly aimed at mothers and not towards fathers. Also, compared to other Nordic countries, Finnish fathers are near the bottom of the list of users of parental leave: parental leave is 158 working days, of which 105 are used by the mothers. So, while Sweden is closer to the so-called ‘universal caregiver’ model identified by Fraser (1997), Finland is more in line with the so-called ‘caregiver parity model’, in which women are paid (albeit a low percentage) to take care of young children. In fact, in the 1990s, women’s employment rates decreased, but they were always higher than in the other countries studied.

Also with a high degree of acceptance of state ‘interference’ in the private and commercial spheres, France occupies an intermediate position. In comparison to many European countries, it presents greater evidence of institutional policies for family welfare, with significant consequences (often viewed as paradoxical) in terms of women’s participation in the labour market and fertility rates, both of which have long been the highest in the EU (Fagnani 2007). Although it is often described by specialists as a country divided between feminism and familialism (Jarty 2006), French social policies always oscillate between aid provided to working parents and caregivers (without formal gender distinction) and others aimed at mothers. So, on the one hand, in addition to free, full-time school available to all children from the age of three, since the 1980s there has also been funding and construction of collective public nurseries to extend school hours (morning, afternoon and evening) to cover the care of these children. On the other hand, the conditions for access to and payment of parental leave have encouraged exclusion of fathers from this right, and hence a widening of the gender divide. These measures explain both the full-time employment rate of French women, historically very high, and the professional and social instability of less privileged mothers. In line with this contradiction, Lewis (1992) identified France as a Modified Male Breadwinner model in which caregiving (of children and, more generally, of dependent persons) is not shared between women and men, but among women (of the middle and upper social classes), and also the state (Jarty 2006).

Italy and Spain share similar sociocultural characteristics, among others Catholicism, familialism and a strong patriarchal culture, a consequence of which has been their historical connection with the Mediterranean welfare subset (with Greece and Portugal). Strong family ties and the late decline of the Male Breadwinner model characterise, among other things, the social models of these southern European countries. The sexist nature of their family employment systems has also explained their fertility rates, which are among the lowest in the European Union. Associated to the lack of family policies and, above all, to the low levels of public childcare services, the phenomenon (sometimes interpreted as a ‘birth strike’ (Crompton 1999a, b)) was intensified after the Great Recession in Europe: 1.32 children born to women in Italy and 1.31 in Spain in 2017. However, in the first decade of the twenty-first century, the comparative panorama between Italy and Spain is quite different. The ‘silent revolution’ that transformed the employment, education and family of women (Goldin 2006) was more radical in Spain. Although ‘the family’ is considered by convention to be a ‘private’ sphere, the Spanish Welfare

State began offering some policies that were positive for families and supported the idea that gender issues, which were previously defined as personal, are actually highly political. So, in the 2000s, there was a remarkable change in Spain, such as the extension of the three pillars of education, health and pensions to a 'fourth pillar of welfare' that included family and social services (Navarro 2004). In consequence, from the mid-2000s, the proportion of Spanish women in the labour market has grown considerably and the idea that the woman's place is in the home has faded even more. On the contrary, Italy has continued with its more traditional views of gender and motherhood, and women are still on the periphery of the labour market. According to OECD data, while 78% of women aged 24 to 54 were in the labour market in Spain in 2010, only 64% in Italy were, one of the lowest female employment rates in the European Union. Despite the rise of the Adult Worker Model in the European Union (promoted by the European Employment Strategy) and the female drive for emancipation, as well as the need for families to survive on two incomes, Italy is still typically resistant to depart from the family welfare model. Women continue to provide most of the care and assistance to dependent family members (especially in the southern regions of the country), and this is even more the case since the economic recession. Being so strongly affected by drastic budget cuts (particularly towards local governments responsible for social services) and by the dismantling of what were already only embryonic social policies, Italian women are likely to replace the State (Segnana and Vila 2015). For example, when it comes to childcare services for children under 3 years of age, the average coverage rate was around 13.5% in 2014 in Italy, well below the Barcelona Target of 33% for 2010. Some research has identified a 'new intergenerational solidarity trap' for young Italian women: the family versus employment (Segnana and Vila 2015).

The United Kingdom has been classed as a 'liberal' Welfare State: the structure of its labour market (characterised by flexible deregulated employment, and long working days for men, the longest in the EU) and its welfare policies (characterised by the absence of generous provisions for the family) take it closer to the United States welfare model than the rest of Europe (Crompton 2006). In consequence, and because it is the most accessible way to achieve a balance between working life and private life, a high proportion of women have entered the UK labour market on a part-time basis. This phenomenon demonstrates the real relevance of what Crompton (2006) identifies as the 'one-and-a-half earner model', according to which the man works full-time and the woman part-time, the most frequent (heterosexual) domestic arrangement in the United Kingdom. However, belonging to the European Union has been very significant for working life and family-friendly policies: a series of policy improvements were adopted to bring the United Kingdom in line with European Union regulations.

Although the United Kingdom and southern European countries such as Italy and Spain do not belong to the same category in the Esping-Andersen classifications and their feminist critics, or to the social models presented in the second chapter, they share more similarities in terms of state support for care. All three were lagging in recognition of the importance of childcare services. Even before the crisis, there was evidence of a convergence in the commitment and potential of women in Spain

to even go ahead of women in the United Kingdom due to their continued preference for full-time work and making an even more critical contribution to family budgets. The new laws even recognised social support rights for older people who live with their children and who were traditionally expected to receive family care (Sarasa 2011). Both countries have expanded the offer of childcare services, with greater coverage in Spain than that registered in the United Kingdom. This meant a major increase in jobs in the public sector for women: in Spain, this sector accounted for a quarter of the growth of four fifths in total female employment. In the United Kingdom, overall growth was slower (11.4%), but public services accounted for the majority (10.5%). Despite the higher growth rate, the concentration of women in public service jobs in Spain is still only 38%, compared to 49% in the United Kingdom (Rubery and Karamessini 2013). Once again, forecasts of the impact of cuts in planned and existing services on female employment are ambiguous, as in both countries women had entered employment before support for care was generalised. However, austerity policies can be expected to increase the total workload of women and limit their ability to access or remain in paid employment.

Traditionally, women either remained in full-time work or left and took up informal work (Torns et al. 2013), but post-childbirth abandonment has been declining in Spain (Salido Cortés 2011). In addition, in Spain, despite the growth in part-time work, part-time employment rates among mothers of young children are only slightly higher than those of child-less mothers, while in the United Kingdom the employment rates of mothers are approximately five times higher (Rubery and Karamessini 2013).

In line with Mediterranean countries, those of Latin America share a high level of commitment among women to childcare and inter-generational financial support. However, South American countries are no longer monolithic and national peculiarities are strong. Machismo, the different forms of paternalism and maternalism, and also social efforts supported by feminists (inside and outside of the state) are expressed differently.

12.3.2 Variations and Trends in Latin American Care Regimes

In Latin America, and in the four countries studied in the south of the continent, in comparison to Europe, the sexual division of labour and balance between professional and family life were not priority issues of the feminist movement, nor of unions. However, in the face of the challenges posed by new gender dynamics and their social, economic and demographic consequences, and albeit slowly, many Latin American countries have made legal and regulatory changes in relation to care benefits. As in European countries, Argentina, Brazil, Chile and Uruguay face the so-called ‘care crisis’, a symptom of the increasing participation of women in the productive sphere, outside of the home, both for financial emancipation and/or for vital needs. Latin American women have been participating more and more in the labour market since the 1990s, often with a higher level of education than their male

counterparts, but against a backdrop of tremendous socio-economic inequalities that are highly specific to South America. The disproportionate amount of time that women work in comparison to men, as well as the lack of possibilities for caring for children, the sick and the elderly, led governments to consider actions in this territorial area and to seek new forms and models for development (Batthyány 2015; Blofield and Martínez Franzoni 2015).

At the most recent regional meetings (in Santo Domingo in 2013; Brasilia in 2010; and Quito in 2007), Argentina, Brazil, Chile and Uruguay highlighted the need for care to be treated as a central concern. But there are two coexisting political views on the matter: one that sees care as a right and another that sees it as a ‘women’s problem’ that the state, companies or the third sector can support (or not). This latter scenario, called ‘familiar’ (Aguirre 2008) is the predominant one in Latin American countries (including those in the Southern Cone). In other words, the main responsibility for welfare lies with families and women in kinship networks.

In comparison to Europe, the reality is more complex in countries with typically huge social divides that got wider in the late twentieth century. While there are several South American adaptations of the classifications of social welfare, in particular the one established by Esping-Andersen (Filgueira 1998), the contributions of its feminist critics resonated very little in Latin America. In other words, the South American feminist literature has not really made the same kind of effort to classify countries according to how close or distant they are to the male breadwinner/female carer model. Consequently, Argentina, Brazil, Chile and Uruguay cannot be presented in the same way as we have just done for Spain, Finland, France, the UK and Italy. However, the comparative analyses conducted by Costa Rican feminist sociologist Juliana Martínez Franzon (2008a, 2008b) on the welfare models that slowly emerged in South America do enable some parallels with European feminist classifications. Inspired by feminist researchers in the north (like Diane Sainsbury, Ann Shola Orloff and Jane Lewis), Martínez Franzoni questions social policies that promote flexitime, paternity leave and childcare. These reflections led to the construction of a typology of Work–Family Policies, built around three criteria to assess their quality (Blofield and Martínez Franzoni 2015). The first two criteria are based on the potential to promote the ‘gender equity’ of social policies, which are divided according to their views of what gender equality is: on the one hand, ‘maternalistic’ measures that are aimed almost exclusively at mothers and that, in the tradition of difference feminism, reinforce the idea that care is the sole responsibility of women. On the other hand, ‘co-responsibility’ measures that, from a perspective of gender change, are aimed at both fathers and mothers and that seek the implication of both states and men in care. The third and last criterion is linked to the goal of ‘social equity’, i.e. considering accessibility of care services to everyone. This criterion was established in coherence with the general shift towards liberalisation and privatisation of care services, a phenomenon that has very special consequences in countries with high income inequality such as those in South America. Here, social welfare through paid employment generates significant divides (gender, class and racial, among others) because informal employment is still so widespread and

especially affects women, migrants or colonised groups⁶. This is because not only do poor women participate less in the paid labour market, but when they do, they get less labour-based benefits than richer women, most of all because they have to work of their own account or in unprotected occupations such as paid domestic jobs. Therefore, this trend is exacerbated in single-parent households, where women bear the burden of breadwinning and care alone. This latter criterion of 'social equity' is a question of considering these social processes of specific exclusion that are so widespread in the Latin American continent (and increasingly more so in Europe since 2008), which impact the way that the specific effects of gender policies are analysed. For example, the absence of paternity leave, an iconic core goal of European state feminism, cannot really be interpreted in the same way in Latin America:

An extension of paternity leave for salaried workers in any European country will have more progressive distributive implications along socio-economic lines than an extension of paternity leave for salaried workers in any Latin American country. By the same token, an extension of maternity leave to non-salaried workers in Latin America will have a more progressive distributive implication along socio-economic lines than the same leave in Europ (Blofield and Martínez Franzoni 2015: 16).

Finally, Martínez Franzoni's study can be used to highlight a kind of continuum from Chile, with its liberal and strongly maternalist/patriarchal orientation, at one extreme, to Uruguay, with its more gender friendly protectionist-state orientation on the other. Between the two is Brazil, the most unequal continent-country in the world, with its maternalistic position in a protectionist state; and Argentina, with its liberal and maternalistic orientation but also with a social welfare regime.

Presented as the laboratory of neoliberalism since the coup d'état of Augusto Pinochet in 1973 and its legacy of the 'Chicago Boys', Chile set up (and then preserved) an ultra-minimal social welfare system that only provides a flimsy safety net for the poorest populations. State intervention is limited mainly to the economic sphere: it has quickly shifted from state provision of services to privately provided services, in particular regarding health, education and pensions. Chile therefore has a liberal single-supplier or market-based welfare regime (Sunkel 2007). In addition to ultra-liberalism, there is also familialism, which leads to the persistence of a rigid sexual division of domestic work. This country's female employment rates are among the lowest in Latin America, particularly with regard to women from low-income households. Social services were totally privatised in the 1980s, and the social-liberal changes of socialist Michelle Bachelet did little to erode those foundations. With 24 weeks of maternity leave for all working mothers in the formal sector (representing only 55% of working women in 2008, and only for those in the highest incomes brackets), Chile is above the South American standard of 14 weeks (ILO standard) (Blofield and Martínez Franzoni 2015). The policies and programmes to balance family and working life are poorly developed, apart from

⁶For example, women from popular sectors who often work informally cannot access maternity leave.

maternity leave policies for working mothers, where Chile is at the forefront. The *Chile Crece Contigo* (Chile grows with you) programme is considered the main care policy in this country, but by virtue of a new postnatal law passed in 2011, mothers can transfer up to a month and a half of leave to fathers. This institutionalisation of shared parental leave made Chile one of the first countries in the region to begin what is still an embryonic phase of redirecting efforts towards the inclusion of fathers in the debate (with Cuba and Uruguay in 2013).

In Brazil, the feminist problem regarding care for dependent persons has been institutionalised in accordance with two different gender logics. The first is maternalistic and is aimed at women as mothers and connected to poverty relief programmes (for example, the Family Subsidy Programme). The second, focused on developing early childhood policies, refers to mothers as workers (Sorj and Fontes 2009). As in Chile, Brazil's maternalistic orientation is reflected in a long-term maternity leave (almost 17 weeks) for all mothers working in the formal sector. The poverty of working mothers in the informal or precarious sector led, in the 1990s, and as in other South American countries, to the development of policies to combat poverty and specifically maternal poverty, and which make women privileged intermediaries in the relationship established between the state and families, placing them at the centre of the system. Such a phenomenon, which comes from the observation whereby women, unlike men, tend to focus their income on family expenses, had consequences in terms of the maternalistic orientation of Brazilian family policy: it encourages the priority assignment of women to domestic work and care that is done for free. Therefore, the resolution of the empowerment of poor working mothers was never based on promoting the distribution of domestic and care work and participation of men.

Along with this maternalistic tradition, and as a continuation of a quest to promote social equality, Brazil is also characterised by its (laborious) effort to apply a universal right. Under pressure from a feminist movement that has focused on this issue since the 1970s, nurseries for children under 3 years of age were established as a universal right in the 1988 Constitution, and efforts since then have focused on making this right a reality. Between 1996 and 2006, the number of children under 3 years of age in nurseries rose from 7.4% to 15.5%. For the next group, children aged 3 to 6, the rate rose from 53.8% to 76%, an increase of more than 20%. But class divides are noted: in 2006, only 9.9% of children under 3 years of age and from poor families were in nurseries (Sorj and Fontes 2009).

Argentina was considered a ground-breaking Latin American country in the development of its social welfare system, but from gender mainstreaming 'political maternalism' institutionalised the assignment of women to the care of children, the sick and dependent persons (Nari 2004). Across crises and economic adjustment policies, Argentinian women became a fundamental support for household welfare by attending to (as workers) the provision of (meagre) income and attending to (as caregivers) reproductive activities. Hence, in Argentina, the "social and political organisation of care" (Faur 2014) evolved in accordance with the crisis and the moments of economic recovery. The neoliberal policies of the 1990s generated a series of structural reforms that privatised many of the basic social services, such as

education, healthcare and social security. Short-term programmes focused on the most at-risk groups, groups in which women are increasingly more represented. The major crisis of 2001 plunged the country into a situation for several years in which the vast majority of families had to find new strategies and methods to ensure a minimum level of welfare. In the post-crisis period, certain aspects of social welfare were modified: the Néstor Kirchner and Cristina Fernández administrations led to the reactivation of the state's welfare function through the adoption of social policies that protected (i) workers and (ii) the poorest households with children.

Eleonor Faur identifies in Argentina four alternatives for social welfare applied to care, especially of children (Faur 2014). These alternatives are closely related to the economic situation of households, and would probably also reflect the other countries in the region:

- Mothers as full-time caregivers prolong the traditional central role of women as the carers of children and dependent persons, but this is also explained by an economic rationality in the popular sectors (because it means there is no need to pay somebody else to provide that care).
- Care provided by other family members is based on solidarity or, in contexts of poverty, on the compensation produced by a 'care microeconomy' and 'new social welfare' within the community.
- Access to public services holds increasing value following the laws that recognise the rights of children to access educational institutions after 45 days⁷, but the offer is highly imbalanced and fragmented, characterised by a shortage of free, public provision.
- The commodification of care concerns 3 out of 10 Argentinian children whose families have sufficient resources to pay for private nurseries (managed by churches or secular organisations) and domestic services (of differing quality depending on the price).

Unlike its neighbours, Uruguay is the only country that was not completely submerged in post-dictatorship-neoliberalism. And in comparison with other Latin American countries, it is a country with a strong historical legacy of social welfare. Care needs are acquiring the status of a specific public domain and since the 1990s have held a central place on the public agenda. It is described as an emblem of social public policy, sustained by academics, women's organizations, the National Women's Institute and international cooperation (Batthyány 2013). As already dealt with in other studies (Aguirre et al. 2014), the key to putting care on the Uruguayan public agenda was the close relationship between the production of sociological knowledge and the promotion and generation of public policies. The search for this link has marked the course of sociological gender production in the country, from the perspective of critical theory, which proposes that the ultimate goal of generating knowledge is social transformation.

⁷In the 1990s, compulsory schooling was established from the 5 years of age until the end of secondary school.

The design of a *Sistema Nacional Integrado Cuidado* (Integrated National Care System—SNIC) is part of a broader process of social reforms that began in the country in 2005 and that include changes to the healthcare and social security systems, as well as tax reform (Batthyány 2015). The SNIC is designed to adapt to changes in demographics (birth rate, aging), families (sexual division of labour, care deficit) and the labour market (increase in female employment, decrease in female unemployment). The proposal is to formulate a system grounded on universal rights-based social reform policies, together with the creation of services that can support families with the hire of care both in and outside of the home. Territorial decentralisation is a core part of this system, seeking to generate ‘local services’ that are flexible enough to take into account the specific needs of each community for each service. Community participation, in new formats while taking advantage of existing ones, is a cornerstone from a rights perspective. Finally, it is also proposed that care work should be strengthened and professionalised through the training of both family and paid caregivers, with special consideration given to gender, generational and ethnic-racial mainstreaming. As for public centres, the goal is to universalise day care (minimum of 4 hours) for children between two and 3 years of age from poor and vulnerable households by means of *Centros de Atención a la Infancia y la Familia* (Childhood and Family Care Centres—CAIF).

These advances in the South American region are connected with the so-called ‘Pink Tide’, characterised by a period of major and intense political activity in the region. The state once again occupied a central role in redistribution and equity policies. Although the issue of sexual division of labour was not as central as gender violence⁸ or the conquest of rights (reproductive rights in the case of Uruguay or LGBTQI⁹) this tide seemed to have had positive and promising implications for change to family and labour policies to improve equity. But the rise of neoliberalism changed those perspectives.

12.4 Times of Feminist Troubles and Struggles in Growing Neo-Liberal and Authoritarian Environments

The 1990s and 2000s have been characterised by relatively intense activity in terms of gender equality in a large number of European and Latin American countries. Attention has focused more on helping women to balance work and family life than on encouraging and forcing men to do reproductive work. But state feminism suggested the possibility of progressive change. Since the 2008 crisis in Europe and the

⁸For example, Brazil, after the vote on the Maria de Penha Law, became a benchmark for several countries regarding their legislative and legal progress in the fight against violence against women.

⁹Argentina (in 2012) and Uruguay (in 2009 and 2018) legislated on the ‘trans issue’ to bring about a change of civil status, promote demedicalisation and, in the case of Uruguay, access by trans people to education, culture, work and health.

end of the ‘Pink Tide’ in Latin American countries, the situation has become more unstable and the potential for changing gender relations through the institutionalisation of feminism is less obvious. State feminism is turning into market feminism (Kantola 2012), which is characterised by the introduction of private actors to the promotion of gender equality, such as private employers that act to facilitate conciliation. The arrival in power of (sometimes ultra) conservative governments on both continents, and even of authoritarian and neo-fascist governments in the Brazilian case, has been accompanied by drastic budget cuts in terms of equality, to which we must add the emergence of an anti-feminist backlash that has generated new kinds of feminist struggles.

12.4.1 The Recent Shift in Gender Equality Policies

Anti-crisis measures have had a major gender impact, the scope of which has yet to be determined. However, in retrospect of a certain number of years of recession policies in Europe, new research has analysed the consequences of neoliberalism for emerging gender regimes. In the United Kingdom, it is known that the destabilisation of the public sector, severe tax restrictions and, in particular, the drop in social benefits and wages have hit mothers directly (Rubery and Karamessini 2013). Having children is still a key stage in the lives of women in the United Kingdom, which often marks a shift in career paths to part-time and low-paid jobs (Rubery and Karamessini 2013). Spain is also a very special case because it suffers highly from a vicious circle of budget cuts and structural reforms, supervised by the Troika (European Commission) (Salido Cortés 2020). Salido shows how gender inequalities have been one of the collateral effects of the crisis and austerity, relegating the feminist agenda to the background or even deleting it from political priorities. Lombardo (2017) identifies different indicators of feminist regression: (1) budget cuts on equality policies, (2) restructuring of equality institutions, (3) reduction of the Welfare State, (4) neoliberal employment policy, (5) stagnated representation of women, and (6) restriction of the right to abortion.

The new macroeconomic governance regime of the European Union has led, on all fronts, to poorer labour conditions for women. Adjustments in the public sector and the destruction of temporary employment have directly affected the quantity and quality of work by women of all social classes. In Spain, the reformed labour law (RD 3/2012) adopted in 2012 continues to impoverish labour conditions for everyone and women in particular. Many indirect gender effects have been observed, such as more flexible conditions for dismissal, the creation of new kinds of unstable jobs without the right to compensation in (highly feminised) companies with less than 50 female employees, the instability of part-time employment (where women are over-represented) and the indirect effects of this law on women. But the labour reform has also had direct consequences on the deterioration of employment for mothers: such as the limitation on the rights of breastfeeding workers or of mothers of young children who choose to work fewer hours; or the end of state financial

incentives for companies that employ women returning from a long-term parental leave. In a context of low male involvement in domestic work, low income and economic constraints, there was a high risk of Spanish women being forced to withdraw to the domestic sphere (González and Segales 2014). In the name of austerity, the movement to foster women's rights has also been halted, such as the proposal to extend paternity leave, which will not be put back on the agenda for almost 10 years.

Spain seems to revise all the points. This is even bitterer when considering that the 2000s, especially during Zapatero's socialist government, were characterised by the institutionalisation and consolidation of feminist issues. But in other countries too, the reference to the 'austerity situation' and the need for 'rationing' are also used as arguments to justify budget cuts to women's rights organisations. Regarding care, it is interesting to note the French and Finnish cases. These two countries have been less directly hit by the European Troika and are viewed to be advanced in terms of the 'defamilialisation' of care and state (as opposed to paternal) participation, where the permanent rhetoric around the financial crisis also led to the reversion of state feminism. In France, the evolution of family policy is geared towards the development of individual services for families, to the detriment of the promotion of collective services, the same services that had moved France close to Sweden in this regard (Jarty 2006). Even so, nurseries are not only the most popular type of childcare for families (due to the professionalism of the staff and their contribution to learning about life in the community), but they are also the most effective way to guarantee social diversity (Delage 2018). This orientation forms part of the context of the absence of a full and complete ministry dedicated to women's rights (a campaign promise that President Macron failed to heed after his election in 2017) and a 27% reduction of the new Secretary of State's budget (Delage 2018).

In Finland, the election in 2015 of the conservative and populist right-wing government led to what has been deemed a triple political project, that of the "triangle of neoliberalism, conservatism and nationalism" (Elomäki and Kantola 2018). For these two sociologists, this new political turn considerably weakened state feminism, particularly through such significant cuts to public services and benefits that the very emblem of its women-friendly Welfare State, i.e. public care for all children by law, was dismantled. Following a new familialist line that defends "the families right to choose" their own kind of care, the state favours home care, which is much cheaper compared to the costs associated with childcare provided by the state or local councils (Kirsi and Kantola 2016). The introduction of New Public Management in the nineties, but with greater impact in the wake of the Great Recession in Europe, led to the inclusion of measures that involved the market and civil society, as well as the state. The transformation of the Nordic social model is also reflected in the introduction of economic and managerial rationality in the workplace: following on from programmes funded by the European Social Fund (ESF), companies are now addressing the issue of balancing work and family life (Kirsi and Kantola 2016).

While the last decade has been characterised by the weakness of the European Union and European governments to promote programmes for change in gender relations, in the Latin American case, and particularly in the Southern Cone, there

has also been gradual reversion of its progressive wave. This was first confirmed with the defeat of Kirchnerism in the Argentinian presidential elections of November 2015. From a feminist perspective, the new administration, with neoliberal businessman Mauricio Macri as president, was characterised by the absence of feminist issues on the political agenda and, at the end of his term, the denial of abortion after months of intense demonstrations. Then Brazil experienced an institutional coup against Dilma Rousseff in 2016 and, 2 years later, the election of former far-right military leader Jair Bolsonaro (October 2018), a nightmare for the feminist and LGBTQI movement. Before that, Chile witnessed the victory of billionaire businessman Sebastián Piñera (March 2018). And in November 2019, the election in Uruguay of the Catholic, liberal, conservative Luis Lacalle Pou also put years of progressivism and collaboration with the feminist movement at risk. In reaction to this phase in which feminist issues were fading from the political agenda (with different intensity depending on the context), the South America started building a new laboratory for feminism.

12.4.2 Institutional Failures and (South American) Street Feminism Riposte

Faced with defections and instabilities of European governments in terms of promoting equality, the European directive on parental leave shows how hard it was for the European Union to recover its gender equality friendly image. In a context of the EU's alliance with the IMF and the financial markets and, more generally, its active participation in sometimes drastic budget cuts that affected the living conditions of a significant part of the population, this was an attempt by the institution to reactivate and showcase its 'social base' (Collombet and Math 2019). In line with the measures to "facilitate the reconciliation of work and family life" that started in the late 1990s, the draft revision of the 2018 European directive on parental leave echoes an old and important feminist demand: the shared distribution of domestic work between women and men. The first version of the project is ambitious and proposes a reformed directive, based on the following principles: (1) the introduction of the principle of payment for parental leave, at least up to the same level of pay that the worker would receive as sick leave; (2) the introduction of the principle of non-transferable parental leave between parents; (3) the possibility of exercising this right until the child turns 12 years of age; (4) the introduction of paternity leave or second parent leave (depending on whether or not Member States recognise same-sex parenting) paid at 80% of salary and without seniority conditions; (5) the introduction of a right for parents to request different working hours; (6) implementation of a 5-day leave for caregivers of dependent persons.

So, for the first time, the feminist goal of sharing domestic work and care is explicitly at the centre of a draft European directive. Until now, many researchers had advocated co-opting (or even exploiting) the feminist goals of a more equal

distribution of unpaid reproductive work through targets focused on economic and demographic growth (Knijn and Smit 2009; León 2009; Stratigaki 2004). So, all the measures promoted by the European Union aimed at facilitating “the reconciliation of work and family life” had focused only on women/mothers and, in doing so, their results did absolutely nothing to change the sexist nature of social structures. During the debates on the reform of the directive on parental leave, the proposed measures were specifically inspired by the Nordic equality systems that had been so highly praised until then (Stratigaki 2004) but that had never received specific instruments.

But the tensions and disagreements between the Council of Europe, which opposed a measure it viewed as too costly and a violation of the principle of subsidiarity, and the European Parliament, to reinforce social welfare and rights regarding access to parental leave, have given rise to a minimalist version of the project. As in 2008, when it blocked the reform of the 1992 directive on paid maternity leave, France (supported at the time by Germany, the Netherlands and Poland) contributed significantly to the adoption of an impoverished version in terms of women’s rights: President Emmanuel Macron has publicly described the “potentially exorbitant costs” of this measure. Ultimately, the agreement continued after controversial negotiations at tripartite meetings. This dialogue was criticised for its lack of transparency and informality, and reflected the limited vision of the Council of Europe: (1) the number of non-transferable months increased from one to 2 months; (2) the obligatory nature of paid parental leave was limited to a period of one and a half months and its amount was left to the discretion of the Member States; (3) the maintenance of the age limit for children was left to the discretion of the Member States and could go up to the child’s eighth birthday; (4) the introduction of a two-week leave reserved for fathers or ‘second parents’ (if such a statute exists in national legislation), but subject to 6 months’ seniority; (5) the introduction of a right to 5 days of leave for caregivers in cases of serious illness or dependency on a close relative; (6) the right to request flexible working hours to facilitate balance between work and family (distance work, part-time work or flexitime) for caregivers and fathers up to a maximum age of the child that cannot be less than 8 years of age.

Therefore, very few countries needed to change the existing framework: Italy (with Greece, Hungary, Luxembourg, the Netherlands and Romania) needed to open or extend leave for fathers or second parents to 15 days. Spain (with Cyprus, Greece, Malta, Ireland and the Netherlands) needs to provide for parental leave. Only Spain took the opportunity to take the proposal much further¹⁰.

¹⁰On 4 April 2018, Parliament adopted the principle of replacing maternity and paternity leave with 100% paid maternity leave (below a maximum limit), for a period of 16 weeks that is non-transferable for both parents, including six mandatory weeks for the biological mother and father (or the mother’s partner in the case of lesbian couples) after birth. The remainder may be taken, even sporadically, up to the child’s first birthday. The reform is being implemented quickly: parental leave, which had already been increased from 2 to 5 weeks in the summer of 2018, rose to 8 weeks on 1 April 2019 (including two mandatory weeks after birth), then to 12 in 2020 and 16 in 2021.

This backlash, which considerably weakened European state feminism, was followed by the clear reversal of the progressive tide in South America in parallel with a rise in autonomous feminist movements. We have briefly seen that in the context of transitions (in the 1980s and 1990s) and democratic consolidation (in the 1990s and 2000s), the relationship between feminist movements and South American states gradually became one of negotiation and cooperation. Today, this relationship seems reversible: current more hard-line (and authoritarian in the cases of Chile and Brazil) neoliberalism has led to the resurgence of a mood of protest, which resonates internationally towards Europe. In addition to the views that South America has been a ‘laboratory of neoliberalism’ (in the case of Pinochet’s Chile) or more recently as a ‘laboratory of authoritarian liberalism’ (in the case of Bolsonaro’s Brazil), there is now the view that it is a ‘laboratory of contemporary feminism’. New feminist issues are arising on the streets, with major consequences for the recomposition of the European feminist movements hit by the effects of 2008. And what are not really new feminist theories and concepts produced by Latin feminists are becoming apparent in academia. These do not deal with the issue of the sexual division of labour and care (although they did not exclude it), but concentrated first on the latest expressions of a power continuum: gender violence and more specifically femicide. Some of them have resonated internationally in the *#MeToo* context, included in European INCASI project countries: the cry of *Ni Una Menos* (‘Not one less’) that became a hashtag, led to international demonstrations that spread from Argentina to the rest of America and Europe, especially in Spain, but also in Italy (with the cry *Non Una Di Meno*). *Ni Una Menos* was also a step towards other movements that in turn had resonated internationally: abortion in Argentina (with the hashtag *#NosotrasDecidimos*, ‘We decide’) as well a sexual harassment (with the hashtag *#MiraComoNosPonemos*, ‘Look how hard we get’¹¹).

Though focused first on gender violence, the demands extended to other issues, including the sexual division of labour. Making March 8 into a day of feminist striking illustrates both this phenomenon of extension throughout the entire power continuum, as well as the international circulation of feminist modes of action being autonomised by the state. Using the hashtag *#NosotrasParamos* (‘We stop’) and exploiting the increasing number of internet platforms, marches were organised on both continents with common demands: equal pay, the end of the ‘glass ceiling’ and better laws on reconciliation between maternity and employment. The 2018 feminist strike and more especially that of 2019 were a success in several countries, especially in Argentina and Spain, thanks to a new social recognition of the feminist movement and the expansion of feminist networks of different groups. The manifesto of the *Economía Femini(s)ta* (EF) organisation, created in Buenos Aires in 2015, sums up the new inclusion of the sexual division of labour within a long power continuum in contemporary feminist movements: “We are striking for an end to sexist violence, lesbophobia, transphobia and all forms of gender-based

¹¹ Created after a public claim for abuse and rape was made by the Argentine actress Thelma Fardin against the actor Juan Darthés.

exploitation. We are striking because we earn less than men for the same work and because unpaid domestic and care work is made our duty and affects our chances to study, work, and enjoy free time. We are striking because we are the majority of the world's poor, and the majority of workers with the most unstable and worst paid jobs. We are striking because we are undervalued in work environments, objectified and sexually harassed in public and private spaces"¹². Another prominent case was the international resonance of the *Un Violador en tu Camino* ('A rapist in your path') performance piece by the Chilean LASTESIS group¹³, put on for the first time to denounce the sexual abuse by the police during the Chilean social uprising of late 2019. It confirmed both the conflictive relationship between popular feminist movements and the state, and the need not to separate or hierarchize feminist struggles (in this case against neoliberalism and gender-based violence).

The south-north circulation of new demands has gone hand in hand with the exchange of new theories and concepts. Southern feminism, or *Feminismo a la contra* ('counter feminism') (Martínez Andrade 2019), has led to new social approaches and connections with the streets. *Ni Una Menos* was a step towards the south-north (South America–Europe) circulation of concepts: that of femicide, for example. The international resonance of the outrage and demonstration after the assassination of Marielle Franco in Rio de Janeiro sparked the movement to spread decolonial ideas. This theoretical tradition is also characterised by a critique of a hegemonic white feminism, blind to race, but also very urban, and has paved the way for new feminisms grounded on indigenous, African-American and lesbian demands. This has engendered other analytical frameworks in which to design social models for change and inclusion.

12.5 Conclusions

We have a lot to learn from a comparison between Europe and Latin America. The contrast provides an overview of our social systems, their implications for how gender relations are organised, and an understanding of how they work in each country. On both sides of the Atlantic, though more highly prevalent in Europe, in the context of European institutionalisation of feminism in the 1990s, care emerged as an important issue in both the institutional and academic feminist spheres. It led to a series of academic studies, as well as national and international policy programmes on the matter of 'reconciliation'. These policies led countries to be positioned in a typology of 'gender contracts', mostly established according to the level of deinstitutionalisation of the Male Breadwinner model. The construction of academic typologies in terms of care regimes was viewed as an important comparative

¹²<https://economiafeminita.com/nosotras-paramos/>

¹³Using a precise choreography, the text is taken from feminist literature, especially that of Argentinian anthropologist Rita Segato.

indicator of the advances in gender equality between countries. But today, after several economic crises and the rapid rise of neoliberalism, how much of this interpretation still holds? How and why is it mobilised in a new context?

From the point of view of undertaking a comparative research study between Europe and Latin America that takes into account gender mainstreaming, these typologies are a starting point to decipher the state of gender relations in countries where gender issues are approached differently. It can compare the importance given to the transformation (or not) of the sexual division of labour, whether by the feminist movement or by institutions, in the countries of the two continents. But above all, the integration of Latin American contributions to European analyses means we can revise the analytical framework and adapt it to a new social reality. This is especially the case with regard to the introduction of the issue of social equality in a context of multiple crises of capitalism.

Indeed, the increased participation of women in the labour market and the decline of the Male Breadwinner model are largely confirmed in the countries studied. Women are reluctant to go back into the home, although they continue to hold primary responsibility for day-to-day domestic work. The risk of women being 're-domesticated' (Lombardo 2017), either because right-wing populist, exclusionary and totalitarian systems, or neoliberal projects, the primary allies of the financial world, is not happening, not even in the countries that are most affected by the Great Recession in Europe (like Spain) or authoritarianism (like Brazil). Women are staying in the labour market, but the labour market has deteriorated considerably, bringing the new European divides a little closer to the structural ones in Latin America (or, at least, making Latin American contributions to and knowledge of social inequalities increasingly more relevant). Salaried employment, a source of social welfare, is increasingly more segmented, characterised by a social divide between women. On the one hand, privileged women (with degrees, white, urban, often with a "powerful" passport) have more and more opportunities to enjoy the advances of the wage society and economic power. But this opportunity and these privileges have led to few structural changes in terms of gender. On the other hand, a growing proportion of women in Europe are not getting the long-awaited social protection afforded by wealthy societies. Non-academically qualified, racialised, rural, migrant women experience this divide most intensely. The on-going rise of the 'neoliberal-conservative-nationalist' triangle in European countries (Elomäki and Kantola 2018), which would be interesting to compare in Latin American countries, is specifically jeopardising the rights and living conditions acquired thus far by women, and especially the least privileged ones.

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Part V
Social Policies

Chapter 13

Unemployment Benefits: Discursive Convergence, Distant Realities



Antonio Martín-Artiles, Vincenzo Fortunato, and Eduardo Chávez-Molina

Abstract Unemployment protection systems have certain characteristics in common in Argentina, Uruguay, Spain and Italy: they are compulsory and contributory-proportional, although in Uruguay, it also has a capitalisation supplement. Despite the similarities, they work differently because the context of informal employment chiefly, and unemployment, low salaries and precariousness differ greatly. Consequently, the unemployment protection coverage rate varies. Theories of the Active Welfare State, the Investor State and the reforms of unemployment protection systems have led to a certain modernising language being adopted in these countries: activation, employability, conditionality, lifelong learning, flexibility, which are, among others, words shared with Europe.

However, the meanings of these words differ according to the institutional context of each country. In Latin America the welfare state is low institutionalised even almost non-existent, while in Europe it is a diverse institution. Despite this, the four countries share an upward trend in benefit policies, in accordance with the increase in poverty risk.

Keywords Unemployment · Benefits · Subsidies · Coverage · Salary replacement rate · Welfarism

A. Martín-Artiles (✉)

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain
e-mail: Antonio.Martin@uab.cat

V. Fortunato

Dipartimento di Scienze Politiche e Sociali, Università di Calabria, Rende, Italy
e-mail: vincenzo.fortunato@unical.it

E. Chávez-Molina

Instituto de Investigaciones Gino Germani, Universidad de Buenos Aires,
Buenos Aires, Argentina
e-mail: echavez@retina.ar

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13.1 Introduction

Unemployment is major source of income insecurity and inequality. This can be important in times of economic downturn (Pfeifer 2012). On the contrary, contributory unemployment protection systems have been one of the great social achievements to cushion the effects of the economic cycle on employment. Public opinion surveys from different European and Latin American countries coincide on the importance of matters related to employment and the social protection of same (Chebez 2007). This author observes that employment is one of the fundamental pillars in the structure of social order, its legitimacy and access to social rights. Consequently, unemployment is a threat to the legitimacy of social order. Therefrom the crucial importance of institutionalising matters linked to employment and unemployment. However, one of the differences between Europe and Latin American lies in the degree of institutionalisation of matters related to employment and the protection of the unemployed.

Contributory unemployment protection systems differ from non-contributory ones, because these latter ones are of a welfare nature to combat severe poverty (Amarante and Bucheli 2006). Throughout the twentieth century, social protection systems developed in Europe, and at a weaker rate in the majority of Latin American countries, as the historical result of social conflicts to reduce and correct the social inequalities generated by the labour market. Today these social protection institutions are undergoing a reform process.

At present, the academic and social interest in compared social protection policies is linked to the growth in inequalities after the Great Recession in the United States and Europe between 2008 and 2015. Inequalities and the poverty risk have risen in countries from the European Union and in some countries from Latin America. Social inclusion and income security are on the political agenda of both hemispheres today. The reason behind this chapter is the fact that unemployment protection in Europe is associated with the active inclusion policy. The guarantee of families' economic income is crucial in the context of long-term unemployment and the consequent poverty risk (Classen and Clegg 2012). In Europe, social protection systems are being reformed with a view to associating passive social policies with active employment policies, inspired by the Active Welfare State theory (Boyer 2005; Cassier et al. 2005; Fernández and Serrano 2014).

Without a doubt, the unemployment protection debate is also acquiring increasing political importance in Europe as a result of the plan to establish a protection system for supranational unemployment, in the European sphere (Dullien et al. 2017). Initially, it is a concept of social protection as a mechanism to cushion the economic cycle and to cooperate with member states. On the contrary, according to Filgueira (2015), institutions from the "social-democratic" welfare state are almost non-existent in Latin America, because historically none of the variables that promoted it in Europe have occurred there, although in River Plate countries it is more important.

This chapter has two goals: the first is to conduct a comparative analysis of the compulsory and contributory unemployment protection systems in four countries (Spain, Italy, Argentina and Uruguay) participating in the INCASI project: *What are their similarities and differences?*; the second aim is to analyse the trends in the reforms of the unemployment benefit systems. To do so we ask: *Despite the differences between countries, are there common trends in the reform policy?*

Italy and Spain were selected because they are two countries from the south of Europe which share a series of problems, such as high unemployment, long-term unemployment for certain groups, precarious employment especially among youths, low salaries, a fragmented and weak social protection system, and a contributory-proportional unemployment protection model (Del Pino and Ramos 2013), as well as a “familiarist” welfare state (Moreno 2007; Baglioni and Oliveira 2013). These two countries are part of the coordinated economies (Hall and Soskice 2001), which means the state plays a considerable role and social actors participate in the social macro-economic dialogue, as we saw in Chap. 2.

Argentina and Uruguay have been selected for the comparison because they are included in the so-called “*structural heterogeneity*” model of peripheral capitalism (Presbich 1981; Ricupero 2004) or “*economies with hierarchical labour markets*” (Schneider 2009). Both countries have very weak unemployment protection, a high volume of informal employment, a bi-monetised economy and a subsistence economy (Cecchini and Martínez 2011). Therefore, the labour market is more segmented than in Italy and Spain. But despite the institutional differences, these Latin American countries appear to share certain similarities with Spain and Italy, such as the existence of compulsory, contributory and proportional unemployment benefit and the existence of informal employment, although with different volumes and degrees of fiscal discipline.

Our theory is that similarities in the unemployment benefit systems are apparent, but in actual fact they operate differently. In other words, relatively similar institutions work in very different ways when the context changes. In the four countries, the language of liberal modernisation has led to the use of specific concepts linked to the activation policy. Social models are historical legacies and are associated with the economic and political processes of the region. Italy and Spain are protected by the European Social Model, by the neo-corporatist tradition, a system of regularised labour relations, with effective unions and coordinated economies (Scharpf 2000; Hall and Soskice 2001). While in Argentina and Uruguay the neo-corporatist structures are very weak and are conditioned by the *structural heterogeneity* characterising the region. In other words, a type of peripheral capitalism dependent on the central economies, but with a dual nature in which economic experiences similar to the developed world coexist alongside others which do not even manage to resolve the struggle between them, demonstrating strong productive heterogeneities depending on the size of the company (Presbich 1981; Schneider 2009; Ricupero 2004). Despite the differences, there are certain similar trends in the discourses about the reforms of unemployment protection benefits, such as the “formal discursive” link between active and passive policies (in actual fact, non-existent), the demand for conditionality regarding unemployment benefit and the increase in welfarism.

This chapter is divided into four sections. (1) In the first we have seen the introduction. (2) In the second section a more general section which frames the debate, we do a brief theoretical conceptualisation of the concept of unemployment benefits, as well as a review of the comparative models of unemployment protection and their functions, from which two hypotheses will be drawn. We will also analyse a classification of the models based on two dimensions: one, the pre-distributive dimension, which refers to variables such as the unemployment rate, the under-employment time due to a lack of work hours, and the informal employment rate; and the other, the post-distributive dimension, which refers to variables such as the rate of subsidies for people of working age, the salary replacement rate of the unemployment benefits and the coverage rate of the unemployed workers. The analysis of the classification will reveal the similarities and dissimilarities between the models. (3) In the third more specific section, we will examine the specific characteristics of unemployment benefits in Spain, Italy, Argentina and Uruguay, which formally share the definition of contributory-proportional systems linked to formal employment. Here we will also analyse the emerging trends in the design and/or reform of unemployment protection systems. These trends are characterised by the use of a modernising language inspired by the neoliberal paradigm of activation and the conditionality of benefits. Lastly, (4) in the fourth section, we will draw some conclusions.

13.2 Models and Institutions of Unemployment Protection

13.2.1 Conceptualisation

The literature discusses unemployment benefits, which is a restrictive term because it refers to contributory systems and to the rights of the covered person. In general, the benefit systems follow the guideline stipulated in Recommendation number 1 of the ILO, in 1919,¹ in which governments were encouraged to “*organise an efficient system of unemployment benefits*” (Topalov 2000). The causes usually stipulated are involuntary job loss, temporary suspension of a contract and reduced hours due to the restructuring of companies (Amarante and Bucheli 2006). Furthermore, unemployment “protection” is discussed; this term has a broader connotation and includes non-contributory welfare benefits, aimed at long-term unemployed people who have lost the contributory right, to homes that have lost their incomes and to people at risk of poverty. Initially they were “*rescue funds*”, but from the 1940s onwards in Europe they began to be called “*subsidies*” on account of being linked to the Welfare State based on the Rule of Law with the

¹In 1919, at the first International Labour Conference, there were only two countries with compulsory unemployment benefit: the United Kingdom and Italy (Chebez 2007: 3).

Social Security Generalisation Law in 1946 in France, a fundamental milestone (see Castel 1997; Topalov 2000; Chebez 2007).

The unemployment benefit systems were brought into effect towards the beginning of the twentieth century and they evolved throughout the century, inspired by the Bismarck model (Cecchini and Martínez 2011). These benefits were first implemented in Europe and then in Latin America (Diez and Bucheli 2002) and they can be classified as a model of “*segmented universalism*” in the four countries. Despite their universalist vocation, in practice, they have protected salary earners, the middle classes and the organised sectors of the manual working class. The unemployment benefit programmes differ between countries according to the structure and level of benefits, duration of the benefits, requirements to obtain it, and financing and administration. In a considerable number of countries the programmes are anchored in the legislation. In many countries the unemployment benefit programmes are compulsory, in some they are voluntary and in others they are individual, operating as a capitalisation savings system (Chile). In other cases (for example, in Uruguay) there is a supplementary payment of unemployment benefit via capitalisation (Cecchini and Martínez 2011). In a small number of countries there are additional welfare systems for those people who have exhausted the contributory benefits.

The four countries (Spain, Italy, Argentina and Uruguay) have public, compulsory and contributory-proportional unemployment benefit systems. The unemployment protection programmes provide income support for a specific period of time for unemployed workers, in addition to guaranteed minimum income programmes; these programmes are important to guarantee income security to the unemployed and underemployed, workers and their families, thereby contributing towards preventing poverty, at least in its most extreme form. Worldwide, only 38.6% of the labour force is covered by unemployment protection (ILO 2017), to a large extent as a result of the high levels of informal employment and the lack of unemployment protection.

13.2.1.1 Functions of Unemployment Benefit Systems

The programme offers a transitory benefit which essentially seeks to: relieve the loss of income and provide a possibility of returning to the work force; cushion the decline in additional expenditure during recessions; contribute towards stabilising the economy, by supporting consumption; sustain professional activity, retain the skilled work force in the labour market; reduce the risk of poverty and social conflict, as well as being a moral principle guaranteeing income to facilitate social cohesion (Esping-Andersen 2000; Palier 2010; Gómez and Buendía 2014). The unemployment benefit programmes are contributory and differ from welfare programmes in that these are non-contributory.

These social functions of the unemployment protection institution are today questioned and debated from the perspective of neoliberal policies. The hegemony

Table 13.1 Compared unemployment rate (%)

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Italy	6.8	6.1	6.7	7.7	8.4	8.4	10.7	12.1	12.7	11.9	11.7	11.2	10.4
Spain	8.5	8.2	11.3	17.9	19.9	21.4	24.8	26.1	24.5	22.1	19.6	17.2	14.4
Argentina	10.9	9.0	8.2	8.7	8.0	7.4	7.1	7.6	7.4	6.8	8.1	9.0	9.6
Uruguay	10.7	9.3	8.0	7.7	7.1	6.3	6.5	6.4	6.5	7.5	7.8	6.9	8.4

Source: Own elaboration based on OECD (2019) and Eurostat (2019)

of the neoliberal paradigm has led to the argument that unemployment protection discourages the return to the labour market, and consequently, commitment must be encouraged with active job-seeking; and an employment creation policy should also be implemented with tax relief.

The increase in unemployment (see Table 13.1) and long-term unemployment (more than 2 years) has also influenced the debate about its reform, since the high volume of economies studied hinders the financing of unemployment benefits hugely.

The heavy debt of states (Tables 13.2 and 13.3 in the Appendix) today contributes to the demand for reform policies of unemployment benefits. Many analysts state that passive policies would have to move towards active policies to encourage professional training and upskilling (Ciace 2009; Cnel 2014; Heidenreich and Rice 2016) and, with this, transfer the responsibility to the individual (Fernández and Serrano 2014; Del Pino and Ramos 2013). However, this debate on the reforms of the social protection systems differs between countries. As a result, we must discuss the variety of unemployment protection systems, as observed by Chebez (2007).² Said author warned that Argentina still had a long way to go to “*institutionalise a state policy that places employment at the centre of the social question and overcome the economic and political resistances*” (2006: 8). In other words, the persistent problem is still the weakness of the *institutionalisation* of the unemployment protection system.

13.2.2 Analysis of the Compared Models

The specialised literature differentiates between three unemployment protection models in the western countries of the European Union: the social democratic Scandinavian model, the Bismarck model and the Mediterranean model (Esping-Andersen 2000; Pfeifer 2012; Burroni 2014). In addition, we can define a fourth model that is typical of the River Plate countries in South America (ILO 2018).

²Chebez (2007) studied a comparison between Argentina and Spain and highlights that the total resources dedicated to the activation of unemployed people is only 13% in Argentina, and 33% in Spain.

13.2.2.1 Social-Democratic Scandinavian Model

The Scandinavian model (Sweden, Denmark, Norway and Finland) is characterised by being a universalist protection model, with a long duration, and for the generosity of the benefits for the unemployed. However, this model links these benefits to a condition (*conditionality*) for the unemployed person: they must undertake professional training and upskilling (Bambra and Eikemo 2009). An example of this is Denmark, which has introduced *flexi-security* (Burroni 2014), a long-term unemployment benefit in exchange for training and accepting job offers (Kluve et al. 2007; Heidenreich and Rice 2016); apart from individuals aged less than 30 who must accept the training and job offers after 3 months of becoming unemployed. The monitoring and training of unemployed people is performed on an individual basis in order to provide them with guidance. These countries have high expenditure in training, mediation and policies with incentives for those aged over 45. The Scandinavian countries have a “*relatively decommercialised*” unemployment protection model (Esping-Andersen 2000; Ferrera 2013; Bonoli 2010). Said countries are part of the social democratic political tradition, with considerable participation from unions in social concertation.

13.2.2.2 Bismarck Protection Model

The unemployment protection system is contributory-proportional in Germany and the Netherlands, as well as in other Germanic countries. The benefits depend on the unemployed person’s previous contributions (Del Pino and Ramos 2013). In addition, there is an additional social system of transfers to families and subsidies for certain precarious jobs (youths’ mini-jobs), such as housing and transport subsidies.

In the case of Germany, unemployment benefit is also linked to dual professional training, which offers specialised training in companies, facilitating a swift transfer to the labour market. The unions have an active role in social concertation. In general, we can deduce that rights and duties are closely interrelated in the goals to face unemployment.

13.2.2.3 Mediterranean Protection Model

The Mediterranean model (Spain and Italy), is also characterised by being a contributory-proportional system linked to employment, typical of neo-corporatist models (Guillén 2010). Social concertation, with the participation of unions and business-owners, is important for the sustainability of the welfare system. These two countries have unstable labour markets, with economies based on small companies, a high level of temporary employment contracts, high job turnover and informal hiring. This all hinders young people’s and women’s access to the right to unemployment protection, due to the insufficient number of accumulated contributory days. In this context, the insufficiency of the contributory unemployment benefits is accompanied

by a welfare system of subsidies, transfers and supplementary minimum income (Martín Artiles et al. 2017). The result is a very fragmented unemployment protection (Bonoli 2010), which is why the European Union demands ending the fragmentation, standardising the unemployment protection system and linking political policies with active policies to encourage unemployed people and introduce conditionality clauses (Rodríguez Cabrero 2012; Gualmini and Rizza 2015).

13.2.2.4 Latin American Models of Unemployment Benefit

In the Latin American social model (Presbich 1981), market economies coexist with bi-monetised economies (national currency and American dollar) and subsistence economies. Unemployment protection is quite recent in Argentina. It began in 1967 in the construction sector (Diez and Bucheli 2002). But a programme for the entire formal sector of the economy was not introduced until Law 24.013 of 1991 when it was definitively implemented. The unemployment protection programme is financed with a contribution from the company (1.5% of the salary); the worker does not contribute, but the state incurs the deficits.

The institutional protection models of unemployment benefits revolve around protections that are similar to the Mediterranean model, but they present very particular limits, especially, in Argentina (Chebez 2007). The high lack of protection of informal employees limits the scope of the benefit, thereby limiting the capacity of contributory contribution to public coffers, which is an endemic problem in Latin American countries (Cecchini and Martínez 2011). Therefore, the contribution capacity is very restricted, the total number of unemployed people with unemployment benefits is low in Argentina (4.9%, ILO 2019), while in Uruguay it is moderate (27.9%).

In short, based on the above, we can consider two hypotheses.

The first hypothesis (H1) is that the benefit systems, despite having seemingly similar characteristics as contributory-proportional systems, operate differently due to the context of each country, and the informality of employment.

The second hypothesis (H2) is that—despite the institutional similarities and differences in the four countries—the reforms tend to converge in a liberalism-inspired modernising language that follows certain disciplinary patterns.

13.2.3 Classification of Unemployment Protection Models

The following statistical analysis seeks to classify countries in a general framework according to the models and to contrast the two hypotheses. This analysis can be summarised in two dimensions. The first dimension refers to the pre-distributive institutions and the second to the post-distributive ones (Hacker 2011; Zalakain and Barragúé 2017). Pre-distributive institutions refer to the labour market and highlight

the primary inequalities generated by employment, unemployment and informality in work. Post-distributive institutions refer to the institutions that correct the inequalities generated in the labour market, for example unemployment benefit systems and subsidies implemented to reduce the poverty risk (Barragué 2011, 2013).

Based on this distinction between the two dimensions, below we develop an analysis model to study a classification of six variables. On the one hand, for the analysis of pre-distributive indicators we take three variables: (1) the country's unemployment rate; (2) the underemployment rate due to a lack of work hours and (3) the volume of informal employment. In short, these indicators demonstrate inequality, precariousness of employment and the demand for the transfer of contributory unemployment benefits and subsidies.

Furthermore, for the analysis of social protection transfers we take another three variables: (1) the coverage rate of workers with unemployment protection benefit; (2) the rate of salary replacement represented by the unemployment benefit and (3) the proportion of the population of working age who receive subsidies to avoid poverty risk (see Table 13.4).

13.2.3.1 Analysis of Similarities and Differences

The cluster analysis shows the similarities and dissimilarities between the countries, expressed according to the closeness or distance between them, and the models in which they are registered. In Fig. 13.1 we present the dendrogram of the possible associations among standardised variables. Following the analysis of these associations we can observe four groups.

13.2.3.2 Cluster 1: Liberal and Latin-American Countries—Low Unemployment Protection

This first cluster shows the two Latin American countries being analysed: Chile, Argentina and Uruguay, which, alongside Brazil, are part of the model of economies with structural heterogeneity (Presbich 1981) or hierarchised labour markets (Schneider 2009). This cluster is characterised by having very high rates of precariousness, underemployment, informal employment and unemployment. The low unemployment protection in Uruguay and Argentina seems to be essentially explained by four reasons: the high volume of informal work, because many of the unemployed individuals were previously self-employed, because they come from a period of inactivity and because many of them are long-term unemployed who have exhausted the coverage (Amarante and Bucheli 2006). This all leads to strong inequalities, as demonstrated by the pre and post-distributive Gini indices (see details in Chap. 2 and here average in Table 13.5). The countries from this cluster

Table 13.4 Pre and post-distribution indicators (%)

Countries	Pre-distribution			Post-distribution		
	(1) Unemployment rate	(2) Underemployment rate due to a lack of work hours	(3) Volume of informal employment	(1) Coverage rate of workers with unemployment protection benefit	(2) Rate of salary replacement represented by the unemployment benefit	(3) Proportion of the population of working age who receive subsidies to avoid poverty risk
1. Argentina	9.5	11.9	47.1	4.9	50	5.1
2. Austria	4.8	3.5	10	90.5	61	4.6
3. Belgium	6.3	3.7	13.5	80.2	84	7.8
4. Brazil	12.5	7.3	46.8	8.0	50	2.6
5. Bulgaria	5.3	0.6	15.9	25.6	77	2.7
6. Chile	7.2	8.7	22.2	29.9	50	1.3
7. Czech Republic	2.4	0.4	9.2	21.2	77	4.4
8. Denmark	5.0	2.8	11.2	77.2	84	9.4
9. Finland	7.8	4.0	6.3	59.2	67	7.8
10. France	9.2	5.6	9.8	56.2	68	4.8
11. Germany	3.4	2.9	10.2	88.0	59	5.0
12. Greece	19.2	6.4	32.8	43.1	39	2.0
13. Hungary	3.7	0.7	12.2	31.4	68	4.9
14. Ireland	5.7	5.1	13.5	21.6	61	6.3
15. Italy	10.2	2.9	19	56.8	75	3.4
16. Netherland	3.9	4.3	9	62.0	72	8.0
17. Poland	3.7	1.2	38	16.8	65	3.6
18. Portugal	6.9	3.6	12.1	42.1	75	4.4

19. Slovakia	6.8	1.8	16.7	11.2	63	3.5
20. Slovenia	5.5	2.2	5	30.8	85	3.7
21. Spain	15.5	6.6	27.3	46.9	78	7.4
22. Sweden	6.4	3.0	8.2	28.0	72	7.6
23. United Kingdom	4.0	4.4	13.3	62.6	48	4.1
24. Uruguay	8.0	9.4	44.3	27.9	50	0.8
25. USA	3.9	10	36	26.5	60	2.9

Source: ILO (2019) and CEPAL (2019)

N/d no data

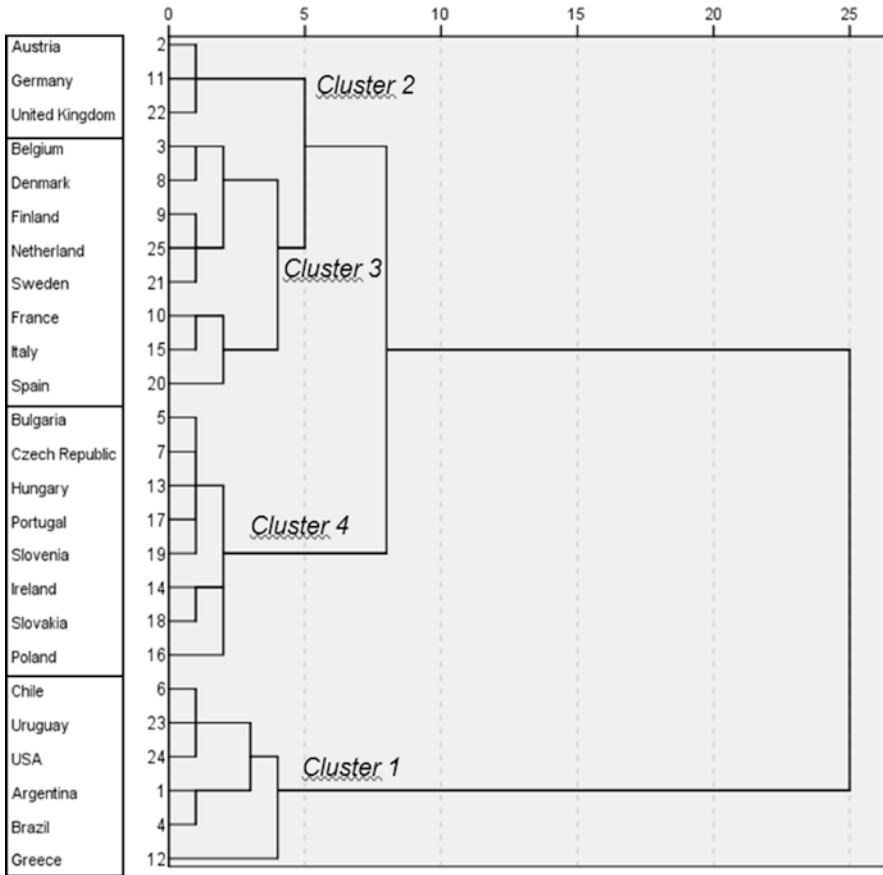


Fig. 13.1 Cluster of countries and models. Dendrogram. Source: Own elaboration

show higher than average Gini indices. The average Gini labour index in 2018 was high and the post-distributive one was also high. In other words, the difference between both indicators highlights that the capacity for correction through post-distributive policies is limited.

13.2.3.3 Cluster 2: Germanic Area—High Unemployment Protection

This cluster contains the neo-corporatist countries, such as Austria, and Germany. These countries share high unemployment protection, subsidies and salary replacement rates, underscoring their protection systems through their welfare states, classified as a Bismarck model (Esping-Andersen 2000; Menz 2008). Even here it is included UK. In this cluster the distances between the Gini labour index, pre-distributive and the post-distributive are reduced. Therefore, the capacity for correction through post-distributive policies is high.

Table 13.5 Classification in four models

Average by cluster (ward method)	Unemployment rate %	Underemployment %	Informal employment %	Subsidises %	Replacement rate %	Unemployment coverage %	Gini-pre	Gini-post
1. Liberal and Latin American countries	10.0	8.9	38.1	2.5	49.8	23.3	0.45	0.39
2. Germanic Area	4.0	3.6	11.0	4.67	56.0	80.3	0.35	0.28
3. Neo-corporatist & Southern Bismarkians	8.0	4.1	13.0	7.0	75.0	58.2	0.35	0.28
4. Eastern and other	4.9	2.0	15.3	4.2	71.3	25.1	0.36	0.30
Total	7.0	4.5	19.5	4.7	65.5	41.9	0.38	0.31

Average by cluster
Source: Own elaboration

13.2.3.4 Cluster 3: Scandinavian Neocorporatist and Southern Bismarkian Countries

The third group contains two subgroups. In one hand, the Scandinavian countries, characterised by strong neocorporatist model. In other hand, Southern bismarkian contributive models, such France, Spain and Italy, whose main characteristics are an unemployment protection and subsidies rate that is close to the average; a salary replacement rate higher than the average of the 25 countries studied; and a high rate of salary replacement due to unemployment. Moreover, these countries have an unemployment level that is close to the average. Informal employment and under-employment stand below the average. The inequalities in this cluster are relatively high, but thanks to the unemployment protection and subsidies, the distances between the pre-distributive labour Gini and the post-distributive Gini are reduced to the same extent as in Cluster 2.

13.2.3.5 Cluster 4: Eastern Countries Model

Finally, this cluster contains the post-communist countries: Hungary, Poland, Chequia, Slovenia, Slovaquia, Bulgaria, with low coverage of unemployment protection, low unemployment rate and intermediate inequalities in Gini Index.

13.2.4 Summary: Argentina and Uruguay Versus Spain and Italy

Figures 13.2 and 13.3 represent the differences between the four countries. On the one hand, Argentina and Uruguay display higher post-distributive Gini indices, that is, they reflect greater inequality and less unemployment protection. Therefore, in relation to the first hypothesis (H1) we can confirm that a high rate of informal employment weakens the protection system. In addition, the contributory capacity of business owners and workers is also weak. This is a structural problem that has continued for many years and does not reduce inequalities.

On the other hand, Spain and Italy have less inequality comparatively and greater unemployment protection. The context of a greater comparative volume of formal employment (H1) contributes to a certain capacity towards sustaining the benefit system. However, Spain and Italy have, although to a lesser extent than the Latin American countries analysed, a considerable volume of informal employment, long-term unemployment, precarious and temporary jobs, and low salaries, representing a potential threat to the maintenance of unemployment benefits. Hypothetically, this seems to be a point of convergence between the four countries mentioned, which we will explore if it applies in the analysis of the second hypothesis (H2).

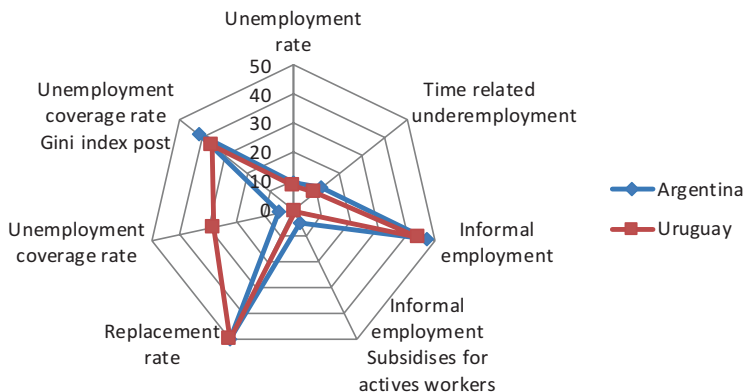


Fig. 13.2 Unemployment and inequality protection indicators in Argentina and Uruguay. Source: Own elaboration base on CEPAL (2019)

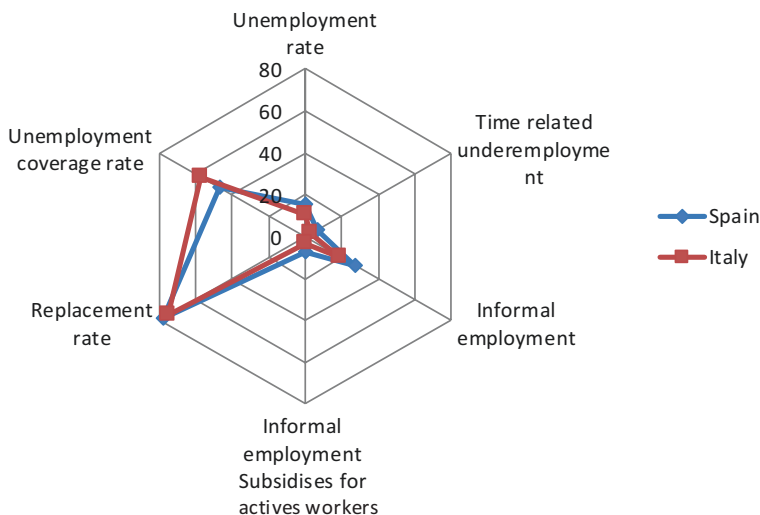


Fig. 13.3 Unemployment and inequality protection indicators in Spain and Italy. Source: Own elaboration base on Eurostat (2019)

According to the comparison between the semi-coordinated economy models (Spain and Italy) and the *structural heterogeneity* model (Argentina and Uruguay) we can observe the different unemployment benefit mechanisms and the trend of their reforms. Unemployment protection can adopt different forms and typically, they have been associated with the aim of cushioning the financial costs generated by losing one’s job. However, this approach is incomplete, since it does not include the reincorporation of the unemployed person into the workplace as the final stage of the protection process against the loss of the source of work. From this

perspective, job-seeking for the reincorporation of the unemployed person into the workplace acquires at least similar importance to the monetary compensation (Van Breugel 2014). In European countries, the response to this problem has consisted of the development of active and passive policies (Fernández and Serrano 2014), the association of unemployment benefits with the obligation to train, upskill and return to the labour market (Martín Artiles et al. 2017). In other words, associating the passive policies (benefits and subsidies) with the active employment policies (mediation, job-seeking and continuous training). In short, the new paradigm is the Active Welfare State, a type of welfare state with liberal and social traits (Boyer 2005).

13.3 Compared Unemployment Protection: Argentina, Uruguay, Spain and Italy

Following the general comparative perspective of models and their classification, set out in previous paragraphs, we now move on to specifically observing the unemployment benefit systems in the four countries (see summarised Table 13.6). The unemployment benefit systems are compulsory, contributory and proportional in the four countries, but with notable differences. In Spain and Italy the company's contribution to the social security contributions is relatively high, in comparative terms. On the contrary, in Argentina and Uruguay it is very low.

The contribution from workers is relatively low in the four countries. The state finances the deficits in all of them. But, in addition, the state allocates resources from the national budget to the unemployment benefits of people who have exhausted the social benefits. In other words, there are two types of transfers: (1) *contributory benefits* for unemployment and (2) *welfare subsidies* for those people who have exhausted the coverage time of the contributory benefit or are at risk of severe poverty.

13.3.1 Unemployment Benefits in Argentina

In Argentina the unemployment benefit has been in force since the beginning of the 1990s. It is contributory in nature (due to its financing scheme), and its role has diminished. In a segmented labour market with a high level of informal labour, only a low percentage of unemployed people meet the access requirements: they must have worked in the formal sector for at least 6 months in the 3 years prior to the termination of the professional relationship, with 1.5% of the employer's contribution going to the National Employment Fund in Argentina. In other words, the context of a high volume of informal employment limits the contributory income to the unemployment protection system, as we pointed out in the first hypothesis.

Table 13.6 Panorama of unemployment insurance

Country	Type of program	With contributions			Benefits			Eligibility conditions
		Employee	Employer	Status	Replacement rate	Duration		
Argentina	Mandatory unemployment insurance Integrated unemployment benefit system (SIPD, 1967)	0%	0.89–1.11%	Finances deficits	50% in the first 4 months; 42.5% between month 5 and 8, and 37.5% in months 9–12. Decline	Up to 12 months	Employment agency registration, willingness to work and involuntary unemployment. At least 12 quotes	
Uruguay	Social security system Social Security Bank (origin 1958, current reform 1981)	Yes, it cannot be separated from the general quotation of 12.5%	Yes, it cannot be separated from the general quotation of 12.5%	Finances deficits	From 66 to 40%, and it exists supplement of 20% for family charges supplement. Decline	6 months	6 months of quotation and involuntary unemployment	
Spain	Mandatory contribution system	(a) Gross Social Security: 4.7% (b) Part destined to unemployment: 1.60 temporary 1.55 indefinite	(a) Gross: 23.6% (b) To unemployment: 6.70 temporary 5.60 indefinite	Finances deficits	70% last salary and decline	From 6 to 24 months	Contribution of at least 6 months for 6 years: To Social Security Being Unemployed	
Italy	Contributory system NASPI—Nuova assicurazione sociale per l'impiego (from 1-5-2015) Sussidio (Wage compensation fund—CIG ordinaria) CIG straordinaria	0.3%	1.61	Finances deficits	75% and decline	Up to 24 months	Contribution 52 weeks in the last 2 years	
			2.2 companies of more than 50 employees 1.9 little companies of less than 50 employees	Finances deficits	80% 80%	13 consecutive weeks—max 52 weeks 36 months	13 weeks of contributory seniority	

Source: CEPAL (2019) and Eurostat (2019)

Since the 1990s the Spanish model has had some influence on the unemployment protection systems in Argentina, according to Chebez (2007). This influences the use of certain “*modernising concepts*” (second hypothesis), such as “*activation, conditionality, lifelong learning, availability, etc.*” Said modernity does not necessarily mean a strong institutionalisation of the unemployment benefit. Actually, it appears there is not sufficient union pressure to strengthen the benefit system in the private sector out of fear that the compensation might be a greater flexibilization of the labour market. The unions preferred to emphasise the payment of severance pay because it can be a considerable amount,³ which in many cases is used as a type of capitalisation to become self-employed or to relieve the period of unemployment.

The total benefit is a small proportion of the lost salary (approximately 120 dollars per month), and as such, even for those entitled to receive the benefit, it is clearly insufficient. Thus, the function of the benefit as income support is limited. In certain cases it even leads to the self-exclusion of the beneficiary due to the low rate of salary replacement.⁴

The duration of the benefit is relatively short, up to 12 months (Argentina) and 6 months (Uruguay). In Argentina there is “formally” a “*conditionality*” policy for active job-seeking and training. However, the means of monitoring and follow-up are very weak or non-existent, and as such, the modernisation is merely discursive. This is a problem in the Southern Cone region: benefit and subsidy systems are not really associated with the employment, training and job-seeking support policy (Amarante and Bucheli 2006).

The unemployment benefit is a certain rate of the salary received and it is known as the unemployment replacement rate (see Table 13.6). This unemployment replacement rate tends to decline in all the countries as a means of pressuring the unemployed individual to actively start looking for work. In Argentina and Uruguay this rate also tends to decrease to encourage active job-seeking. A new aspect in Uruguay is that since the 1996 reform there has been a combination between the system of contributory and proportional solidarity (managed by Banco de Previsión Social, BPS) and another *individuals system of capitalisation* (managed by Administradoras de Fondos de Ahorro de Previsión Social, AFPS) (see Amarante and Bucheli 2006; Ferrer and Riddell 2011). One of the problems in Uruguay is that the incentive for active job-seeking is weak as a “*conditionality*” policy. One of the essential problems is the tradition of the state to mediate between supply and demand in the labour market, an aspect that differentiates these two Latin American countries from Spain and Italy.

³The Latin American model can be characterised more by the sum of unfair dismissal pay than by unemployment protection. The conditions of unfair dismissal are a real capitalisation process for the worker through the severance pay. However, in recent years unions have demanded the consideration of a more protective unemployment benefit, in view of the wave of dismissals. And, especially, that perhaps the capitalisation—through severance pay for the worker—is more volatile in the context of very high inflation.

⁴It is regulated by three laws: The National Employment Law (Law 24.013). The Rural Workers’ Law (Law 25.191) and the Construction Industry Law (Law 25.371).

But the great problem is informal employment, which does not contribute to the sustainability of the system. The result is a strong dualization: those who have had contributory employment can receive a small unemployment protection. And, informal workers are completely unprotected, at risk of severe poverty. Although there are welfare policies, these can be insufficient in inflationary processes, and they are not updated according to said process, like in Argentina from 2016 to 2019.

13.3.2 Unemployment Benefits in Uruguay

Originally in Uruguay the programme covered private workers and excluded domestic and rural workers and workers from the financial sector. From 2001 rural workers were also included (Decree 211/01), although under more restrictive conditions, and from 2006 domestic workers were included (Law 18,065). Under the general regime and in the case of workers receiving a fixed salary, to access the subsidy, the workers must have worked for at least 6 months in the last year and must be involuntarily unemployed. In the case of dismissed workers, the new regime replaced the flat rate of 50% of the average salary from the last 6 months with a decreasing payment scheme. Workers with a family to support can receive an additional 20%. The rate of workers with unemployment coverage is 27.9% (Cepal 2019). The worker cannot use the unemployment benefit again until 12 months have passed since he/she last received it. Although the benefit can be received for a maximum period of 6 months (1 year in the case of people aged over 50), the Executive Power can extend this period.

It is important to highlight the “suspension” modality in the benefit, also known as “reduced work time”. This modality covers those workers whose work hours in a company have been reduced or who are part-time employees. In America, only Canada, the United States and Uruguay have this benefit. In Latin American it is an exclusive feature of the Uruguayan model (ILO 2017).

13.3.3 Welfare Subsidies in Argentina and Uruguay

Welfare subsidies are another means of protection for the long-term unemployed who have no more contributory benefits. In Argentina there is also a welfare benefit policy, called the Training and Employment Benefit for people in situations of vulnerability. There is no requirement to have contributed previously⁵ (Decree 336/2006). The benefits can extend to 12 months and count towards future retirement. But the benefit is basic (equivalent to 3.21 Euro monthly in 2019); although it

⁵Reference: Ministry of Employment of Argentina: <https://www.argentina.gob.ar/acceder-al-seguro-de-capacitacion-y-empleo>

can increase according to the number of dependent children and attendance at training workshops, reaching 22.86 Euros. This requirement can be considered a conditionality. Another *conditionality* is attending the employment offices twice a month to demonstrate active job-seeking.

Furthermore, there is a system called the Universal Child Allowance, a social inclusion programme to avoid severe poverty. An allowance can be granted for up to three children and generally informal workers also receive it; the *conditionality* is that they have to take their children to school and have them vaccinated. The allowance is approximately 100 Euros per month according to the number of children.⁶

In comparative terms Uruguay is the country with most similarities to the European social-democratic model in terms of rights guaranteed by the Constitution and the social policies system (Cecchini and Martínez 2011), although there are also vast social sectors excluded and with low coverage in the contributory social protection system. The generosity index of the OECD (see Table 13.7 in Appendix) gives it a low score (15%).

In short, as regards the first hypothesis, we can summarise that in Argentina and Uruguay informal employment hinders the capacity to protect the unemployed. And in relation to the second hypothesis, both countries have included the *modernising discourse of activation*.

13.3.4 *Unemployment Protection in Spain and Italy*

In Spain and Italy unemployment benefit is compulsory, contributory and proportional (see Table 13.6). The sum and period of the benefit has declined and there is a policy associated with the training and job-seeking support policy. This policy is linked to the follow-up and monitoring of benefits through a system of indicators managed by the employment offices, following the guideline of *conditionality of the benefit* defined by the Active Employment Policies of the European Union (H1), which cofinances certain assistance programmes through the European Social Fund⁷ and the Social Cohesion Fund, among others.

However, the follow-up and monitoring of the *conditionality* are implemented unequally in the administrative regions of the two countries, meaning that to a certain extent the conditionality is merely a formality in some regions with a very high volume of unemployment. The problem is that the application of the *principle of conditionality* requires administrative and professional staff that the employment offices do not have. The ILO recommends a ratio of one civil servant to 80

⁶For more information, see: <https://www.anses.gob.ar/informacion/montos-de-asignacion-universal-por-hijo-y-por-embarazo-para-proteccion-social>

⁷The total investments from the European Social Fund made between 2014 and 2020 rose in Spain and Italy, and was equivalent to 0.59% of the GDP of each country. The highest investments were recorded in Hungary (4.10%) and Portugal (3.99%). These investments were dedicated to active employment policies, training and welfare subsidies for the long-term unemployed.

unemployed people to support active job-seeking; however, the ratio in Spain is 1/607 and in Italy 1/611 (Martín Artiles et al. 2017). As a result, to a certain extent, in line with Chebez' idea (2007) about convergence in the discourse of *liquid modernity*: the meta-accounts of *conditionality* (H2) have been taken as a universally applied great theoretical interpretation without taking into account the context of each country.

13.3.5 Welfare Subsidies in Spain and Italy

In Spain there is a wide range of transfers for the long-term unemployed who have exhausted the contributory benefits, such as the Prodi Programme, Plan Prepara 2011, the non-contributory job seeker's allowance, benefits for unemployed people aged above 45, returned immigrants aged above 45, and disabled people. In addition, there is a benefit for people aged above 52, an Agricultural Regime subsidy, and lastly—last social protection network—the guaranteed minimum income (RMI) of the regions, which oscillates between 300 and 800 Euros depending on the region. These welfare benefits increased during the Great European Recession (2007–2015) (Martín Artiles et al. 2017). The subsidies have a duration of 6 months, but they tend to be extended. The European Union has recommended that Spain reduces the fragmentation of the benefits and the regional heterogeneity of the guaranteed minimum income (Sarasa 2018; Rodríguez Cabrero 2012). In 2020 has been implemented a new national Minimum Income (Ingreso Mínimo Vital-BOE n. 165, 12/06/2020-) in order to avoid severe poverty, reduce inequalities between regions and the fragmentation of subsidises schemes, as suggested European Union (Rodríguez Cabrero 2012; Pizzuti 2009; Gualmini and Rizza 2015).

In Italy the system is also very fragmented (Strati 2012; Kazepov and Barberis 2013), and the benefits are called: Naspi; mini-Naspi; Mobility allowance (Indennità di mobilità); Wage Guarantee Funds (Cassa Integrazione Guadagni) and recently Citezenship Income (Renta de Cittadinanza). Several years ago, in his keynote speech at the University of Padua (2009), the then Governor of the Bank of Italy, Mario Draghi, defined the Italian system of social security networks as “*notoriously fragmented*”, with a benefit coverage that is “*extremely heterogeneous per sector, per company size and per work contract*”, underscoring how, “*to deal with the recession, the government's action was reduced to facing problems not structurally, but operating with existing instruments, temporarily extending the coverage and allowing exceptions in access criteria and duration*”. In both countries the contributory benefits and subsidies cushion the relative poverty. Despite this, both in Spain and Italy, the Third Sector is gaining increasing importance in the protection of the unemployed—women, immigrants, people aged above 45, etc.—at risk of social exclusion (Rodríguez Cabrero 2005; Ezquerria and Iglesias 2013; Pavolini and Raitano 2015).

13.3.6 Trends in the Reforms of Unemployment Protection

In the second hypothesis (H2) we indicated that the reforms tend to converge in a modernising model, inspired by neoliberalism, which follows certain disciplinary guidelines based on the *idea of activation*. An element of political pressure to reform unemployment benefits is the high volume of unemployment (Table 13.8). The following table shows how during the Great Recession (2007–2015) unemployment increased at an alarming rate in Spain, and in Italy. On the contrary, in Argentina and Uruguay it decreased slightly.

13.3.6.1 Common Trends and Differences Between Spain and Italy

The elements characterising the reforms are as follows: (1) A trend towards associating active and passive policies via “conditionality” clauses; (2) A trend towards reforming the fragmented structure of the benefits and subsidies system; (3) Exhaustion of the contributory benefits and supplementary payment with subsidies (Molina 2015). These elements are analysed below.

One of the common goals in the reforms undertaken in Spain and Italy is to promote expenditure on active policies and combine it with passive policies (Ferrera 2013; Coacia and Legini 2013). The case of Denmark is often taken as a reference, as it has high expenditure on mediation between supply and demand, with individualised and supervised monitoring of the unemployed; it also has high expenditure on training unemployed people, as well as specific groups (Fernández and Serrano 2014). On the contrary, Spain and Italy spend more on incentives for private employment, to encourage job-creation in companies. They also spend more on direct job-creation in the local sphere. These local initiatives, coordinated by the town councils, are aimed at giving support through work and income to those unemployed people who have exhausted the contributory unemployment benefit and are receiving grants or are about to come to the end of the coverage period (Burroni and Pedaci 2014).

Many unemployed people exhausted the contributory unemployment benefits, which became a source of pressure to introduce new non-contributory benefit and subsidy systems. Such is the case of Spain during this period, with the approval of

Table 13.8 Public unemployment spending. In % of GDP

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Spain	1.779	1.740	2.184	3.352	3.003	3.34	3.232	3.116	2.543	2.025	nd
Italy	0.476	0.424	0.49	0.773	0.821	0.796	0.91	1.045	1.017	0.996	nd
France	1.438	1.303	1.251	1.555	1.599	1.506	1.574	1.628	1.626	1.620	nd
Finland	1.742	1.489	1.392	1.884	1.938	1.642	1.724	1.937	2.205	2.369	nd
Chile	0.032	0.03	0.057	0.066	0.104	0.035	0.017	0.052	0.055	0.085	0.02
UK	0.218	0.203	0.287	0.446	0.374	0.394	0.39	0.314	0.214	0.173	nd

In % of GDP

Source: OECD (2019)

Nd no data

the subsidy programmes Prodi and Prepara in 2011, as well as other subsidies reformed during the recession, as we will see below. It also occurred in Italy, with the recent approval of the Citizenship Income (Reddito di Cittadinanza) (2018). Many analysts have classified this policy as “*welfarist*” since it seeks to avoid the risk of severe poverty (Kazepov and Barberis 2013; De la Rica 2015).

An examination of the measures implemented in the programmes in the fight against unemployment reveals the existence of a certain convergence in the policies in Europe, such as (1) the growing importance of local job-creation programmes by the public administration; (2) the promotion of training and professional upskilling programmes, and (3) advice for unemployed people through incentives and sanctions and the growing trend in the EU towards a supranational coordination through the European Social Fund, the European Regional Development Fund and the Cohesion Fund, among others. This all appears to conclude in a trend towards the introduction of common patterns in European policies against unemployment. This shared pattern of convergence in the elements mentioned is a demonstration of the “*vertical coordination*” of the spill-over effect of the European Union policy (Scharpf 2000).

But despite the convergence, Spain and Italy have a problem in common: a very fragmented unemployment protection and subsidies system, criticised by the recommendations from the European Union, which insists on streamlining the mentioned systems. Italy recently started (2018) a system unification policy through the Guaranteed Minimum Income (Tridico 2015; Baldini and Gori 2019). Also in Spain has been implemented in 2020 the Ingreso Mínimo Vital with the same purpose.⁸

13.3.6.2 Common Features of the Reform Trends in Argentina and Uruguay

Unemployment protection in these two countries shows three main characteristics: (1) varied instruments, often superimposed and with little relation between them, and (2) a partial efficacy to guarantee benefits that make up for salary loss and that support the reincorporation of the unemployed person into the workplace. (3) The protection is incomplete as it does not always guarantee that an unemployed person will have monetary assistance (severance pay comes into effect in specific circumstances). Or when they are entitled to it, there is no guarantee that the resources will be sufficient to finance the duration of the unemployment (individual savings accounts).

The discourse on the modernisation of the protection systems is also present in the policies of Argentina and Uruguay, although formally. An indicator of this is that the effectiveness of the unemployment protection can be strengthened through a combination of passive and active labour market policies. The formal objective of the discourse seeks to move from passive regimes, exclusively oriented towards

⁸Data from the National Institute of Social Insurance (INPS) show that 1.3 million Italians receive an average subsidy of 519 Euros. These are essentially long-term unemployed people from the south of Italy (55%). The payment of the income is individual, but through family implications it adds up to more than two million people who are receiving UGL (General Labour Union) Survey of Public Employment Services in Italy and Europe (2018).

replacing income for unemployed people, to a combination of these with measures that support its beneficiaries in the search for a new job or that improve their employability through job training. In other words, a discourse with modernisation arguments similar to those used in Spain and Italy, as we suggested in hypothesis 2.

13.4 Conclusions

1. In general terms we distinguished four models of unemployment protection: (1) Liberal and Latin-American countries; (2) Bismarkian model in Germanic Area; (3) Scandinavian neocorporatist model and Southern Bismarkian countries; (4) Eastern countries.

2. As regards the first hypothesis, we have demonstrated that the unemployment benefit systems operate differently in the European and Latin American contexts, despite both formally having contributory-proportional systems. We can conclude that effectively there are certain similarities in Spain, Italy, Argentina and Uruguay in certain aspects of the institutional design, such as the fact that the benefit system is compulsory, contributory-proportional and the ultimate responsibility of the state to save the system through the financing of deficits. But we must immediately mention the strong differences depending on the context. We can even discuss contributory “*fiscal indiscipline*” in Argentina and Uruguay. While in Spain and Italy the business contribution is much higher, monitored by the Labour Inspection and disciplined.

The unemployment coverage level presents very low rates in Argentina and Uruguay, due to the high volume of informal employment and the low institutionalisation of the system,—let us remember that the institutionalisation of unemployment benefit should be a powerful institution to correct inequalities—. While in Spain and Italy the coverage is comparatively high, because those who have exhausted the contributory benefits also receive income subsidies. The degree of informal employment is comparatively less in Spain and Italy. In these two countries the benefits and subsidies system is fragmented. Hence, the European Union is calling for the different types of benefits to be streamlined.

Likewise, there are differences between Spain and Italy as there also are between Argentina and Uruguay. In Spain, the generosity index is wider, although Italy has just implemented the Citizenship Income (*Renta de Cidadanza*), which could contribute towards improving it and towards reducing the territorial north-south inequalities. Also Spain has just implemented in 2020 other national Minimum Income in order to reduce inequalities and harmonise territorial differences in the context of covid’s pandemic and strong pressure of Trade Unions.

3. As regards our second hypothesis, we conclude that unemployment benefits are ballasted. The weight of long-term unemployment, as well as temporary and precarious employment, has been hanging over Spain and Italy for years. This entails a lack of continuity in the contribution and low financial contributions to the social security. The response to these problems has consisted of the promotion of active employment policies associated with the unemployment benefit or

subsidy. Said response is part of the European Union active employment policy, which has financing instruments (European Social Funds), which can act as disciplinary rules for those countries that breach the regulations.

However, the activation discourse has a certain air of formal modernity. But in practice, some of its postulates are relatively discursive and empty, such as that of “*conditionality, activation, job-seeking support, employability and continuous lifelong learning*”. Only certain regions with low unemployment can implement said policies in Italy and Spain. In some regions the employment offices are unable to implement the discourse because they lack resources and staff.

Paradoxically, this *modernising activation discourse* has also transferred to Argentina and Uruguay. However, it is limited by the informal employment problem, the black economy, the weakness of its tax base and the weak institutionalisation of the unemployment benefits. In the case of Argentina, perhaps the challenge today will be for the existing benefits to institutionalise, consolidate and extend their coverage in the context of the Argentinian economic recession and its extremely high inflation rate. However, the debate on unemployment benefits has emerged again in Argentina and Uruguay as a result of the increase in unemployment and the dismissals in the formal private sector.

In short, certain modernising theories have taken root in the discourse of the reform policies, such as the Active Welfare State, the Investor State and a series of concepts that are incoherent with the context of the four countries. But said liberal discourse seeks to introduce *social discipline mechanisms though the principle of activation, responsibility and placing the blame on the individual as regards unemployment and poverty risk*. The state, the community and the social structure are no longer responsible, it would appear.

4. To conclude, the four countries share some similarities in their trends, such as: (1) the increase in welfare policies; (2) the growth of the Third Sector to tackle inequalities and poverty risk, in view of the state’s “withdrawal”: in Italy and Spain because long-term unemployment has increased and as a result of the precariousness of new jobs. In Uruguay and Argentina as a result of the high volume of informal employment and the low salaries; (3) likewise, in the four countries, the high volume of public debt restricts the possibilities of political manoeuvre; (4) the responsibility of job-creation lies on the market, not on public intervention because the states are indebted; (5) another similarity is the implementation of a discourse aimed at the association of passive and active policies, even with a certain degree of conditionality for unemployed people so they can receive benefits although said discourse is still merely a formality, and is far from a reality. Lastly, (6) another common feature is the emphasis on pre-distributive policies, focused on development in the labour market, where the idea that the *first distributive social policy must be employment* is emphasised.

As a final note, it is important to point out a final difference between Europe and Latin America: despite the reforms of the unemployment protection systems, in Europe the bureaucracy and fiscal system has a considerable capacity to monitor and sanction. In addition, there are strong trade unions that have contributed towards the pressure to sustain the welfare state.

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Appendix

Table 13.2 Public debt in % of GDP

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Spain	38.9	35.6	39.5	52.8	60.1	69.5	85.7	95.5	100.4	99.4	99.0	98.3	97.6
Italy	102.6	99.8	102.4	112.5	115.4	116.5	123.4	129	131.8	131.5	132.0	131.8	132.2
Argentina	70.8	62.1	53.8	55.4	43.5	38.9	40.4	43.5	44.7	52.6	53.1	57.1	86.3
Uruguay	75.7	68.0	59.8	63.1	59.4	58.1	58.0	60.4	61.4	64.6	61.6	65.7	70.0

Source: Cepal (2019) and Eurostat (2019)

Table 13.3 Public deficit or surplus (In % of GDP)

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Italy	-3.6	-1.3	-2.6	-5.1	-4.2	-3.6	-2.9	-2.9	-3.00	-2.6	-2.4	-2.4	-2.2
Spain	2.12	1.89	-4.57	-11.28	-9.53	-9.74	-10.74	-7.04	-5.92	-5.18	-4.31	-3.02	-2.54
Argentina	1.65	0.76	0.35	-1.83	1.39	-2.75	-3.02	-2.37	-1.88	-4.25	-6.00	-6.7	-5.22
Uruguay	-0.7	-0.17	-1.42	-1.52	-0.42	-0.36	-2.37	-1.88	-2.84	-2.22	-3.1	-2.7	-2.02

Source: Cepal (2019) and Eurostat (2019)

Table 13.7 Generosity index

Countries	First year %	Average substitutions of income over a period of 5 years (tax benefit and welfare subsidies) %
Noway	72	72
Belgium	65	63
Germany	64	45
France	67	45
Finland	60	43
Spain	69	39
United Kingdom	28	28
Argentina	50	22.6
Uruguay	50	15
Brazil	50	15.1
Chile	50	4
Italy	75	7 ^a

Sources: For European countries OECD (2007), from Latin America Chebez (2007)

The OECD generosity index (2007), calculated for a period of 5 years, provides us with an idea of the role played by contributory benefits and welfare subsidies for the unemployed. The following table provides us with a brief overview of the countries analysed, as well as of other countries

^aThis indicator has recently changed with Cittadinanza Income

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Chapter 14

Pension Systems Compared: A Polarised Perspective, a Diverse Reality



Patricia Scarponetti, Leandro Sepúlveda, and Antonio Martín-Artiles

Abstract Globalisation and international competition have a spillover effect on the reforms of pension systems that imposes a similar pattern of dismantling, hardening access to pensions, reducing expenditure and retrenchment in said reforms. The comparative analysis of four countries with different pension systems: two liberal (United Kingdom and Chile) and another two with contributory-proportional systems (Spain and Argentina) serves to determine the details of the reform processes, which discursively seem to have a shared pattern recommended by the international financial and economic institutions.

But the reality of the four case studies shows considerable differences in the implementation of the pension reform policies. The reforms depend on the societal context, institutions, history, the role of unions, the government in power, demographic factors and economic perspectives, among other matters. Many countries need to sustain pension systems because they are associated with many pensioners' political vote. Therefore, the spillover effect of globalisation and the convergence in certain uniform patterns of reforms is far from reality in the four countries, and as such, the measures adopted are specific for each country.

Keywords Pensions · Occupational pensions · Reform policies · Globalisation · Social dialogue · Neoliberalism · Corporatism

P. Scarponetti (✉)

Centro de Estudios Avanzados, Universidad Nacional de Córdoba, Córdoba, Argentina

L. Sepúlveda

Centre for Enterprise and Economic Development Research, Middlesex University Business School, London, UK

e-mail: L.Sepulveda@mdx.ac.uk

A. Martín-Artiles

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain

e-mail: Antonio.Martin@uab.cat

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14.1 Introduction

The aim of this chapter is to analyse the changes (1) in the public contributively pension systems protected by the State (pay-as-you-go) and (2) the private capitalisation pensions, managed by insurance companies or banks. The latter are divided into two: (a) on the one hand, occupational capitalisation pensions, which involve financing from a company and voluntary contributions from the employees; (b) on the other hand, private capitalisation pensions taken out individually by a person with a bank or an insurance company (Del Pino and Rubio Lara 2016). Today, resuming the debate about pensions, from a comparative inequality studies perspective, entails describing their oscillating nature in some countries in Latin America, as well as the redesigning that has taken place in European countries since the Great Recession (2008–2015).

For the case of some countries from the southern cone—Argentina, Uruguay and Brazil, with the exception of Chile—said movement can be contextualised via complex processes of social change, which took place during the last decades of the twentieth century and the first decades of the present century. While, on the one hand, the re-democratisation processes in the region operated in societies with an optimism based on recovering the protective role of the State, in parallel, the public policies implemented did not manage to overcome the economic downturns, giving rise in the 1990s to the beginning of a cycle of adjusting fiscal expenditure in the conditioning context of external debts. Both processes happened during the global reorganisation of *austerity* capitalism that reconfigured the economy, and in particular the labour markets.

Said political and economic reconfigurations became a focal point of discussion because they blocked the stability of traditional social protection and therefore the welfare of the populations, in this case that of elderly adults, placing the democratic design at a point of tension between the State and the market. It is no coincidence that every once in a while, citizens' claims against adjustment or against neoliberal policies are repeated. Today we are witnessing mass citizens' demands in Chile¹ and Colombia, as well as on the other side of the Atlantic in France, and not too long ago, in Spain and the United Kingdom. In all of these, people have been protesting about pensions in very different contexts. The discourse calling for the negotiation of new social pacts after the changes of a globalised economy, once again polarises societies about how to provide social welfare in democratic designs.

In Latin America, social welfare systems have traditionally been divided into *contributory and non-contributory* systems.² While the *contributory Social Security* is generated from payments by the insured and by employers with state guarantees based on the diverse conditions and positions in the labour market, on the contrary,

¹Beyond the range of claims in the Chilean citizens' movement that began in October 2019, the *NoMásAFP* movement is notable in reference to the pension capitalisation system managed by the pension fund managing companies.

²While some literature in Latin America uses the term "pillars", a word taken from the first report from the World Bank and the OCDE, its use is less frequent.

the *non-contributory* Social Security is rendered viable through public policies aimed at those who do not meet all the terms and is executed through a financing of revenues and general taxes or with surpluses from the contributory systems. Non-contributory pensions in Latin America were limited when these systems initially came into effect; however, they experienced considerable growth in recent years in order to ease the living conditions of the most vulnerable population. Their growing evolution has played a very important role in the debate, by accompanying the trends in the reforms of the state welfare systems towards individual capitalisation systems, in which the *employer's contribution disappears* and the State's role becomes subsidiary.

As stated by Bertranou (2006 and Bertranou et al. 2009), the reforms of the 1990s *adjusted financial and economic goals* to move towards capitalisation while in the first decade of the present century the *poverty-relief goals were readjusted*, and as such the coverage was extended to those sectors lacking contributory conditions. Based on these considerations, the reflection made by Mesa-Lago (2004: 99) is relevant. He highlights the enormous diversity of pension systems in countries of Latin America, summarised in three different models: substitutive, parallel and mixed. However, beyond the perspective of this double division of welfare systems into contributory and non-contributory ones, state (public) and capitalisation (private or mixed), there are permanent reforms to the parameters which reconfigure the ages to access the benefit, the increase in the years of contribution, redefinitions of the formulae to calculate the amount to be received; aspects that contribute towards the increase in gender or age inequality.

Beyond the pioneering example of Chile which reformed its state welfare system to a capitalisation regime in 1980, the reforms that followed this model proved to be loss-making either because they did not comply with the objectives set out, or because they could not be sustained in adverse economic contexts. As a result of the critical contexts in both continents since 2008, new reforms were subsequently considered. In Latin America they were known as *re-reforms*; such as in Argentina and Chile, among other countries (Becker and Mesa-Lago 2013).

Furthermore, a specialised literature review highlights the existence of a series of points in common in the reforms implemented in the European Union (European Commission 2012), through the Open Method of Co-ordination (OMC). The successive reforms of the welfare state have demonstrated a trend towards the reduction of expenditure on pensions, strongly conditioned by debt and public deficit in countries such as Spain, Italy, Greece, Portugal and Ireland, as we will see below. This context favours the emergence of two theories on the reformist trends in pensions. On the one hand, the idea of the *Active Welfare State*, a liberal-social proposal that defends the maintenance of the welfare state, introducing the *principle of activation*. Both the OCDE and the European Union have supported and promoted its objectives, mentioned again through the *European 2020 Strategy* by the European Commission (Rubio Lara 2016). On the other hand, the conservative proposal of the *Investor-State* considers that the sustainability of the welfare state depends on the medium-term growth rates, and in turn, this depends on investment in R&D (research and development), human capital and the spread of new technologies (Palier 2010).

Therefore, the principle guiding this policy is the “*return on investment*”. However, both theories often have points in common, as we will see below.

We face similar problems in the countries from both continents, but to different extents. These are precarious labour markets, the transcontinental migratory explosion, ageing of the population, public debt and the financial downturn. While in the European Union the balance between the active and inactive population in forecasts for 2050 is concerning, the same can be said for some Latin American countries. Flexible and precarious labour markets, with low salaries and high vulnerability of social rights, fuelled by a migratory work force from other countries in the region, have turned the debate about pensions into a tight knot that jeopardises the traditional views of social protection.

Considering these conditions, the forecast of the expenditure on pensions for the countries from both continents is concerning, and even more so when in each situation in which the fiscal deficit intensifies, the advice to introduce structural reforms or changes in restrictive parameters is repeated, as well as the insistence to turn towards capitalisation systems. In this way, the definitions of who retires and in what conditions (age, pension sum) and with what financing—whether state or capitalisation—gives rise to a debate that is under no circumstances resolved.

With a view to performing a comparative treatment to give an account of the effects of the reforms implemented and their consequent trends, we have selected case studies of two European countries (Spain and the United Kingdom) and two Latin American countries (Chile and Argentina). The choice of the two former countries serves to show the trends towards private occupational pensions—although with very different degrees of implementation—while, in the latter two, we situate the trends of *re-reforms* in two different cases: a capitalisation system and a state system.

Our analysis is based on the comparison of different welfare models and their reform policies. In the countries studied the dominant discourse is about the need to reform pensions to facilitate sustainability in the context of globalisation (spillover effect). One of the options lies in the implementation of negotiated occupational welfare (Trampusch 2007), but its implementation depends on the political context, its institutions of collective negotiation and the role of unions and employers. In other words, reference to the context reminds us of the importance of “societal factors”, history, local institutions and the role of social actors, such as unions, employers and the government, among others (Boyer 2005). Thus, the hypothesis we formulate is that the reform policies of pensions do not follow a standard pattern imposed by the demands of globalisation, but the responses differ according to the institutional context.

In the context of these considerations, this chapter is structured in five sections after this introduction. In the first section, we will review the social protection system in the context of the global economy and the subsequent theoretical discussion of two paradigms: Neoliberalism and the Active Welfare State. In the second section, we will conduct a brief statistical analysis to identify the general models into which pension systems fall in Argentina, Chile, Spain and the United Kingdom, providing us with a comparative framework with other countries. In the third

section the possible elements of convergence of the reforms brought on by globalisation in pension policies (spillover effect) are discussed, as well as the general responses. In the fourth section we will analyse the cases of the four countries in depth, which will show us how there have been different responses to similar problems, although there have also been common elements in the responses. Lastly, in the fifth section, we will draw some conclusions.

14.2 Social Protection in the Context of Global Economies

Vast literature has been written about the transformation of the welfare state, which Adelantado and Calderón (2005, 2006) summarise in three explanations: (1) the transformations are due to external globalisation pressures (spillover effect) that have forced governments to reduce social expenditure, fiscal pressure, to make the labour market more flexible, to decentralise collective negotiation to business level, among other factors due to international competition; (2) another argument is that the transformations of the welfare state are due to internal factors resulting from pressure from social actors, such as employers and unions, to the ageing of the population and the subsequent increase in expenditure on pensions and health, and the move towards a services economy with jobs with lower average salaries that in industry and, consequently, fewer revenues from Social Security payments; (3) the third explanation consists of the combination of both factors in which exogenous and endogenous factors influence each other, giving rise to multiple responses, depending on the local institutional context. In this context of reforms in recent decades, new concepts have appeared, such as the Active Welfare State and the Investor State (Vielle et al. 2005; Palier 2010).

14.2.1 The Neoliberalism Crisis: A Change of Paradigm in Europe?

Although the theory of the Investor State has a conservative connotation and the Active Welfare State is of a social-liberal nature (Boyer 2005), we could agree that they today form part of a new paradigm that appears in the literature of advanced European economies from 1995. The term Active Welfare State seems more appropriate to use because it goes beyond the economic perspective, it is more sociological and includes an institutional dimension, social and labour rights, and social actors (unions, employers, third sector, etc.). Moreover, it is essentially a new and different paradigm that is alternative to neoliberalism (Arnsperger 2005). Therefore, we are facing a potential crisis of the neoliberal paradigm which has dominated the political scene from 1980 to the present day in the European context.

In the last decade a crisis of the liberal paradigm and its political formulae to deal with unemployment, pensions and social protection seems to have begun. Indicators of this are, among other phenomena, the rise in protectionism, nationalism and regionalism, Brexit, the mass demonstrations in Chile and France and protests of pensioners in Spain in response to the uncertainty and rise in inequalities (Campos Lima and Martín Artiles 2014, 2018). Therefore, it should come as no surprise that the Active Welfare State is a response to the neoliberalism crisis as a new emerging paradigm (see Table 14.1).

As regards intervention of the State, neoliberal approaches have defended the idea of the Minimum State. On the contrary, the Active Welfare State paradigm argues the need to sustain the state's role in the economy and welfare, but linked to the return on investment in initial and continuous training, as well as support for production (Vielle et al. 2005).

As regards the prediction of retirement pensions, the neoliberals have proposed the expansion of individual private pension plans. On the contrary, the Active Welfare State proposes a strategy of a Multi-pillar Welfare State with different

Table 14.1 Comparison neoliberalism & social active state

	Neoliberalism 1979–1995	Social active state 1995–2020
1. State intervention in economy	Minimum State	Public investment oriented to return, support to production and social redistribution
2. Welfare State	Dismantlement Workfare not Welfare	Financial sustainability of Welfare Ageing societies and pressures of voters on labour parties and trade unions
3. Retirement Pensions	Private pensions plans	Multipillar Welfare State, diversifications sources of financialization <ul style="list-style-type: none"> – Contributively and proportional pensions – Assistance pensions – Occupational pensions – Private pensions plans – Implementation third sector
4. Employment Strategy	Oriented to market Individual merit Activation Flexibilization of labour market	Individual merit and social cohesion Future return of investment policies Activation, employability; continuous training
5. Collective Bargaining Level	Limited at company level Decentralisation collective bargaining	Social Pacts: articulation between levels, Trend to desentralisation collective bargaining Occupational Pensions: Negotiated Welfare corporatist
6. Assistance	Guarantee Minim Income Workfare	Assistance policy against poverty but linked with conditionality of incomes: training, searching for activation, employability
7. Social Policy	Assistance, first social policy it is employment	Articulation between active employment policies and social policy: conditionality of social protection

Source: Own elaboration

sources of finance to guarantee its sustainability (Comisión Europea 2003), such as contributory-proportional public pensions, welfare pensions to relieve the poverty risk, negotiated occupational pensions in companies, individual pension plans with tax allowances and the intervention of the third sector in the area due to the decentralisation of the welfare policies (European Commission 2012).

As regards the implementation strategy, liberal thinking has been characterised by Margaret Thatcher's famous thought in the 1980s, that we could summarise as: *more market less State, more entrepreneurship less unions* (see Harrison 2011: 331–332). This strategy is complemented by the idea that social merit is an essential condition for upward social mobility. The Active Welfare State also proposes individual merit, but associated with the return on investment in training, activation, employability and continuous life training, without neglecting the need for social cohesion. Social dialogue between unions, employers and the State is important. Therefore, collective negotiation and social pact are important elements to construct negotiated occupational welfare (Trampusch 2007).

Lastly, regarding welfarism, the newest feature of the neoliberal proposal against extreme poverty could be related to the guaranteed minimum income, but with the hidden intention of paying the Welfare State. On the contrary, the paradigm of the Active Welfare State proposes a welfare policy linked to the conditionality of the benefit, which consists of more continuous training and active job-seeking (European Commission 2012). The proposal is to link the active job-seeking policies with the passive benefit policies; in other words, to link pre-distributive and post-distributive policies (Zalakain and Barragué 2017).

In short, we can deduce that the link between passive and active policies is a challenge to sustain the welfare state. Therefore, it is understood that from the Active Welfare State theory we are facing a double challenge to implement the pre-distributive policy in the collective negotiation to guarantee income from salaries and their respective contributions via social contributions, while also implementing a post-distributive policy that sustains the pension system. Let us remember that some analysts understand that this policy should be accompanied by changes in financing (Clasen and Clegg 2012) through the diversification of the sources of funding through a multi-pillar system³; this political strategy—promoted by the European Union—seeks to diversify the funding so as not to depend on contributory pensions, the demographic effects of the ageing of the population, and the changes in the labour market. These changes explain the move from *Welfare* to *Workfare* stemming from the concept of the Active Welfare State (Boyer 2005). In other

³In accordance with Liedo (2005), the social security systems described as “multi-pillar” have been adopted from the taxonomy proposed by the WB and the OCDE based on three pillars corresponding to: “Pillar 1: a redistributive and anti-poverty system financed with taxes, relatively small, with defined benefit and publicly managed; Pillar 2: a defined contribution system of compulsory capitalisation and privately managed through a personal or occupational plan; Pillar 3: a voluntary defined contribution system, of capitalisation and privately managed. The World Bank doctrine proposes the separation of the redistribution functions from the saving functions in social security systems”.

words, a reduction in the redistributive intervention of the State with protective criteria to correct the former post-distributive inequalities to another pre-distributive policy, associated with activating unemployed people towards employability, active job-seeking and the extension of the retirement age because life expectancy is increasing. In other words, as described in the second chapter of this book, there is a tendency to emphasise the importance of pre-distributive policies to the detriment of post-distributive policies (Zalakain and Barragué 2017).

Nevertheless, some analysts express their doubts about the supposed new paradigm of the Active Welfare State and the Investor State. The paradigm of social investment has been presented as a new model of the welfare state that differs both from the Keynesian welfare state and the neoliberal model, with a wide consensus in antagonistic political positions such as social democracy and conservative driving forces. However, under said paradigm, such different models of social investment are considered that Rubio Lara (2016) expressed his *doubts* as to whether this really establishes a break with the neoliberal trend.

14.2.2 *Re-reforms in Latin America*

A considerable difference is the *weak institutionalisation of the pension and social protection systems* (Ubasart and Minteguiga 2017) in Latin America. Likewise, the neoliberal paradigm has dominated the political discourse. The impacts of the neoliberal economic reconfigurations in the Latin American countries brought about reforms in the social security systems in the region, backed by international finance organisations. The World Bank (1994) instigated the reforms of the pension systems in various countries in the region; with its famous report *Envejecimiento sin Crisis* (1994) [Ageing without Crisis], it laid down the foundations of the structural reforms towards a multi-pillar system that recommended both the strengthening of the capitalisation and non-contributory pillars; the main goal was to encourage the replacement of the public “defined benefit” based on “distribution”, with individual capitalisation systems of “defined contribution”. These reforms reduced the state function and introduced new economic agents such as private pension funds, essential actors in a capital market (Tangarife et al. 2015).⁴

In 2004, Mesa-Lago produced an analysis for CEPAL with the aim of comprehensively comparing the impact of pension reforms in the context of the traditional principles of the Social Security. With a view to observing the divergence of stances with the principles established by the International Labour Organization and the International Association of Social Security, the author presents an analysis of how the principles protected by the treaties promoted by these organisations adapted to

⁴A decade later, the World Bank would publish another document: “*Keeping the Promise of Old Age Income Security in Latin America*” (2004), described by some analysts “as a self-criticism” of its first report.

the economic criteria of the reforms driven by the World Bank and the International Monetary Fund.

Welfare pensions have also been part of social policy in Latin America, and demonstration of poverty is demanded. The paradigmatic example is observed in the reform of the Chilean social security system that took place in 2008 and once again placed the tension between focalisation and universalisation at the centre of the debate. The political discourse surrounding welfarism has also been linked to the demands for activation, employability and conditionality of the benefits, although in actual fact this policy is still underdeveloped as a result of the high costs of managing unemployment, as shown in Chap. 13 of this book.

In the academic debate in Latin America, it has been insistently proposed that the social security system reforms replaced the distribution regime with the capitalisation regime, in such a way that the political intervention of the state now has a subsidiary role. In this regard, it is important to remember that maintained by Del Valle (2010) regarding how the commercialisation levels operating in society are defined. The author's comment must be related to the necessary intervention of the state and to the informality of the labour markets in the region. In short, the Latin American social model can be defined as Structural Heterogeneity resulting from the combination of formal economy, informal economy, double currency (dollar + local currency), family economy and weak institutionalisation of social protection (see Chap. 2).⁵

14.3 Classification of Pension Regimes

This classification analysis seeks to discuss each of the four countries studied in the context of welfare models. The construction model of this classification of pension regimes was created using five variables (Table 14.2).

- The first variable is the GDP per capita. This variable conditions the possibilities of social expenditure, expenditure on pensions, in particular, but it also conditions

⁵Del Valle (2010: 66–67). Del Valle (2010) criticises the argument “we could put forward the theory that, in all societies with a market economy, the forms of state intervention in social relations stem from the systemic relation that exists between the State and the economy”. Following that put forward by Offe & Ronger, he specifies that “distribution refers to the intervention via which the State assigns resources which it already monitors or obtains through coercive exercise (laws, decrees, etc.) in order to guarantee processes of accumulation of capital. (...) the existence of underground activities can be interpreted as the result of the forms of state intervention, it can be stated that these cannot be interpreted as reflections of current transformations in the supposed path towards modernisation but as a structural part of the functioning of Latin American systems. (...) and a political dimension, given by the way the State intervenes in the stratification processes, and this is due to its role in the assigning of resources, in other words, as an agent that takes resources from some people and gives them to others. In this regard, the State defines the commercialisation levels operating in society, since the practice of assigning resources reproduces, amplifies and reduces stratification processes”.

Table 14.2 Retirement pensions regime indicators

Country	Informal employment	GDP per capita	Social expenses (% GDP)	Public pensions expenses (% GDP)	Private pensions plans (% GDP)
Argentina	47.1	21,064	14.3	7.8	10.2
Austria	10.0	53,895	26.6	13.9	5.5
Belgium	13.5	49,526	28.9	11.8	7.3
Brazil	46.8	15,651	15.1	9.1	12.6
Bulgaria	15.9	20,948	16.0	0.0	12.5
Chile	22.2	24,181	16.1	5.1	70.2
Czech Republic	9.2	38,037	18.7	9.0	8.9
Denmark	11.2	54,337	28.0	10.3	45.4
Finland	6.3	46,344	28.7	12.9	47.7
France	9.8	44,125	31.2	14.9	0.7
Germany	10.2	52,574	25.1	10.0	6.7
Greece	32.8	28,580	23.5	16.2	0.7
Hungary	12.2	28,799	19.4	11.5	3.9
Ireland	13.5	76,889	14.4	7.4	31.6
Italy	19.0	40,981	27.9	15.7	7.6
Mexico	57.0	19,655	7.5	1.8	14.1
Netherlands	9.4	54,423	16.7	6.9	171.0
Norway	7.3	62,182	25.0	9.9	9.8
Poland	38.0	29,583	21.1	11.3	7.5
Portugal	12.1	32,554	22.6	13.8	9.7
Romania	28.9	26,590	14.9	0.0	5.2
Slovakia	16.7	32,376	17.0	8.1	11.7
Slovenia	5.0	36,163	21.2	11.8	5.6
Spain	27.3	39,087	23.7	11.4	8.8
Sweden	8.2	51,405	26.1	8.9	4.1
United Kingdom	13.3	44,909	20.6	7.7	104.5
Uruguay	44.3	11,739	16.0	0.0	27.1
USA	36.0	59,774	18.7	4.9	76.3

Sources: ILO (2019) and OECD (2019)

the growth of occupational pensions and private pension plans. The term occupational pensions is used to refer to those private capitalisation pensions that companies offer to their employees through collective or individual agreements. Private capitalisation pensions are those individually taken out through policies with banks or insurance companies.

- The second variable is occupational and private pension plans (measured as a percentage of the capital accumulated above the GDP), which enables us to see a clear division between the capitalisation regimes and the other contributory and universalist regimes.

- The third variable is the expenditure on pensions, measured as a percentage of the GDP, which also contributes to clarifying the division between the different pension regimes.
- The fourth variable provides us with information on social expenditure, which can contribute to the definition of regimes based on the greater or lesser presence of the State in social protection and in subsidies and transfers.
- Lastly, the fifth variable is the volume of informal employment, which will also help us to classify the pension models because said variable indicates that the countries with a greater proportion of informal employment (such as those of Latin America), have fewer resources for contributory pensions and, therefore, the most likely option is the development of non-contributory pensions and welfareism to tackle poverty. These indicators have been collected for a set of 28 European and American countries.

According to this model, we perform a factorial analysis of chief elements to describe the correlations between the variables considered and to observe the distribution of similarities between the different countries. The correlations observed show us how social expenditure has a positive association with the expenditure on public pensions and with the GDP per capita, and a negative correlation with informal employment, which highlights that informal employment is a serious obstacle for the post-distributive policy. Public pensions correlate similarly; they have a positive correlation with the GDP per capita, which also highlights the importance of the level of wealth to be able to distribute and avail of pensions in a country. The relation between public pensions and informal employment is also negative. The GDP per capita has a negative relation with informal employment, as could be expected.

Our analysis reveals an explained variance of 79% with the first two factors. Table 14.3 shows the relation between the original variables and the two retained factors, and Fig. 14.1 represents the distribution of the countries in the factorial space. The first dimension (52%) is defined by the social expenditure in comparison to informality. Thus, countries with high social expenditure, such as the Scandinavian social democratic countries contrast with the Latin American countries or the countries with low social expenditure and a high level of informal employment. The second dimension (27%) reflects high or low levels of private pension plans,

Table 14.3 Component matrix

	Components	
	1	2
Informal employment	−0.817	−0.262
GDP per capita	0.721	0.487
Pensions public expenses (% GDP)	0.779	−0.407
Private pensions plans (% GDP)	−0.040	0.901
Social expenses (% GDP)	0.893	−0.238

Correlations

Source: Cited dates (ILO 2019) and OECD (2019)

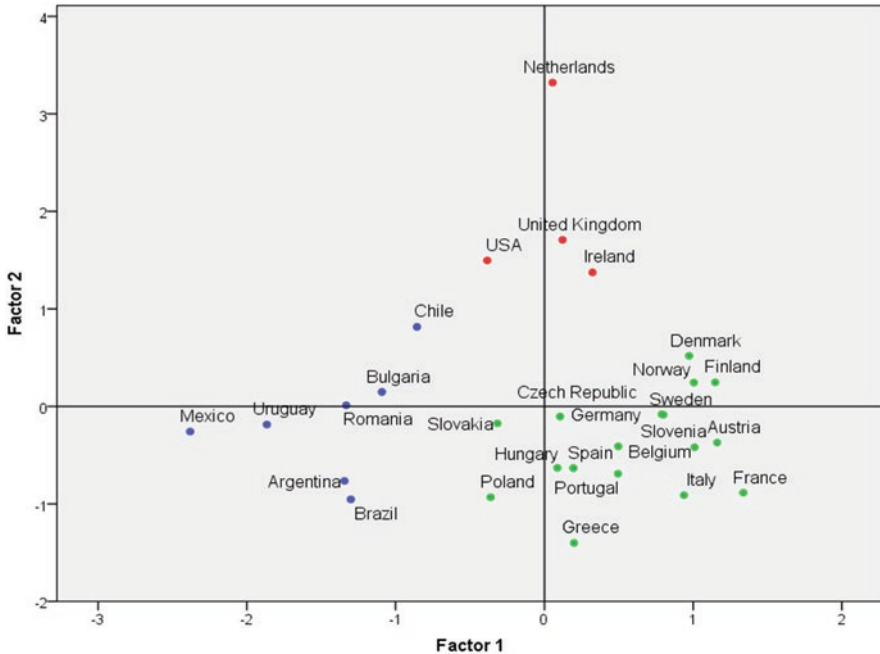


Fig. 14.1 Pensions systems classification by countries. Source: Own elaboration

grouping those countries with private capitalisation regimes at the top, and at the other extreme, at the bottom, those countries with contributory regimes.

Based on the intersection of these two dimensions, Fig. 14.1 shows the distribution of the countries classified into three groups after applying a hierarchical cluster analysis using the Ward method. (1) On the one hand, in the upper right quadrant, the countries with predominantly capitalisation regimes based on occupational and private pension plans appear. In other words, countries considered to have liberal regimes, such as the US (76.3% GDP), the United Kingdom (104.5% GDP) and Ireland (31.6% GDP). In this quadrant, a particular case is the Netherlands (171% GDP) as it has a very important occupational pension regime of companies and private individuals, but strictly speaking it cannot be considered a liberal regime because its plans are part of a negotiation tradition (since the beginning of the twentieth century) of Social Partnership, negotiated with the unions, also known as welfare negotiated with the unions (Trampusch 2007).

(2) The lower right quadrant contains the social democratic countries, such as Finland, Sweden, Denmark and Norway, with high social expenditure, high expenditure on pensions and formalised employment. In this group, Denmark and Finland have a moderate percentage of their GDP invested in occupational pension plans and this is a supplementary support to state pensions. It is also a pension plan system negotiated with unions. This group also includes countries with contributory regimes, with high expenditure on pensions and social protection, but with low

participation in occupational and private pension plans. Austria and Germany are in this group. Below these appear the Mediterranean countries, such as France, Italy and Spain (8.8% GDP), whose main difference is the scarce participation in capitalisation regimes (that is, in occupational and private pension plans). It can be added that the growth in private pension plans and occupational pensions has been halted by the financial downturn since the European recession, as well as other factors that we will examine below. However, Spain, Greece, Portugal and Italy have a greater proportion of informal employment. Therefore, they may have been forced to make a greater effort to develop non-contributory and welfare pension plans.

Lastly, (3) the lower left quadrant contains the Latin American countries, such as Brazil, Argentina, Mexico and Uruguay, which are part of the group with high informal employment, a low capitalisation pension regime and a contributory system for formal employment, but with weak institutionalisation (Ubasart and Minteguiaga 2017). This group also includes Chile, although it tends to be closer to the first group of liberal countries. This is a group of countries with a strong duality in the pension regimes: the *insiders* with the contributory system derived from formal employment and the *outsiders* who are not entitled to access contributory pensions, but possibly with certain welfare protection and non-contributory resources, which correspond to the Latin American model known as a regime of structural heterogeneity.

14.4 European Convergence in the Reform Policies of the Welfare State

To date this century, the reform policy of the welfare states in Europe has tended to adopt certain standards of harmonisation or even convergence considering they are facing shared problems, such as the ageing of the population, precarious labour markets, public debt, the financial downturn and the forecast of public expenditure on pensions for the decades to come, in the context of the limits imposed by the Maastricht Treaty in 1992, such as the control of public deficit, public debt and inflation, as well as the limits imposed by the Great Recession (Comisión Europea 2003; European Commission 2012, 2020). Let us take a look at these limits.

14.4.1 *Limits in Policies*

As we have indicated above, governments have seen their room to manoeuvre to finance pensions in each of the four countries studied reduced.

Spain In the case of this country, in 2007 accumulated public debt was relatively moderate (35.6% of the GDP), but the Great Recession forced it to make a huge effort to cover the unemployment benefit and pensions, in such a way that in 2018

the accumulated debt represented no less than 97.6% of the GDP in 2018 (see Fig. 14.2). The reduction in the room to manoeuvre was also reflected in the fiscal deficit, the difference between fiscal income and expenditure. In 2007 Spain still had a surplus of 7.7% of the GDP as a result of the expansive economic cycle that took place between 1995 and 2007. However, the deficit shot up from 2009 (−10.4%) to 2012 (−10.4), which were the hardest years of the recession. Since this date it has reduced, but the deficit was still worrying in 2018 (−2.4% of the GDP, see Fig. 14.3). But the pressure is there: the forecast of expenditure on pensions tends to increase towards 2030, as reflected in Table 14.4.

United Kingdom This country was also very affected by the Great Recession. The public debt in 2007 was also moderate (41.5% of the GDP). Between 2010 and 2013 said debt rocketed until reaching 79.5% last year, and it continued to increase until 2018 (86.2%). This trend is also reflected in the fiscal deficit. In 2007 it already had a fiscal deficit of −2.6% of the GDP. In 2009 the deficit reached −10% of the GDP and from that date on it reduced until reaching −1.3% of the GDP in 2018.

Argentina This country, unlike the previous two, experienced moderate growth during the period (see Chap. 2), in such a way that it contributed to reducing its public debt: in 2006 it had a debt of 70% of the GDP. It managed to gradually reduce it to 38% in 2011. But from this date onwards, it increased again until reaching 52% in 2015 and 86% in 2018. The fiscal deficit has followed a parallel trend: in 2006 it had a slight surplus (1.3%), and in 2008 again (0.2%). From that date onwards, it has grown until reaching −3.9% in 2018.

Chile This is the only country that started with a very low level of accumulated public debt, barely 3.8% of the GDP, with a fiscal surplus of 7.7 and 4.7% of the GDP in 2007 and 2008 respectively. But from 2010 onwards, public debt started to

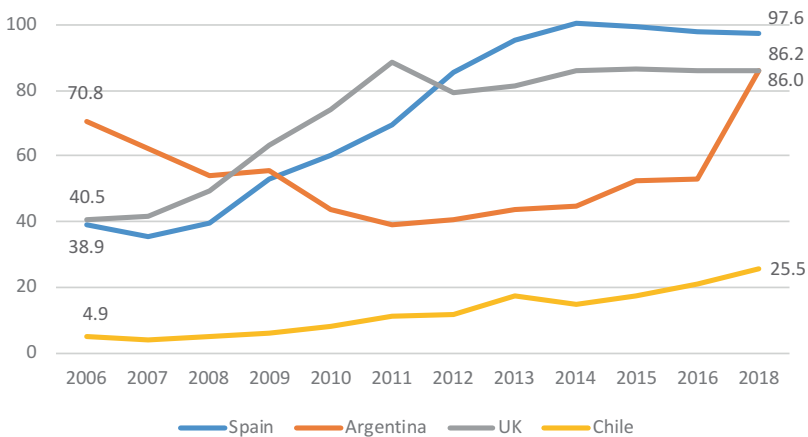


Fig. 14.2 Public debt as % GDP. Source: Expansión (2020). Datos macro-economicos

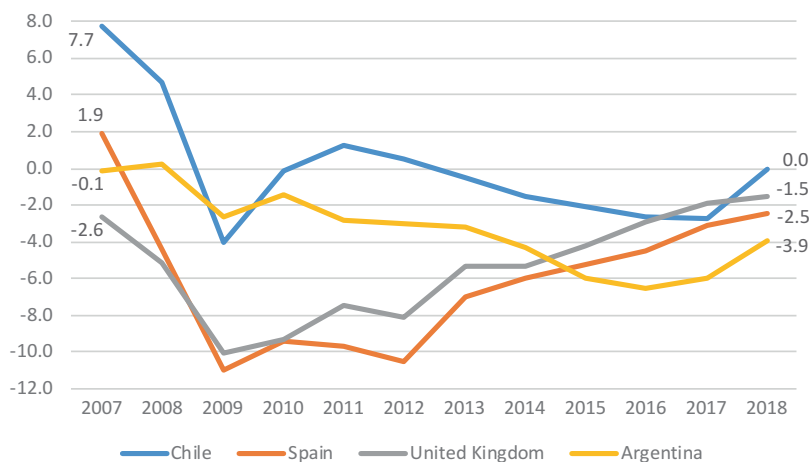


Fig. 14.3 General government fiscal balance as % of GDP. Source: OECD (2020) and Expansión (2020)

Table 14.4 Projection of social expenditures on pensions (% GDP)

	2015–2016	2020	2025	2030
Argentina	7.8	–	–	–
Chile	5.1	–	–	–
Spain	12.2	12.3	12.4	12.6
UK	7.7	7.7	8.0	8.0
OCDE	8.8	–	–	–

Source: OECD (2020)

increase from 8% of the GDP in 2010, to 17% in 2015 and 25.5% in 2018. The fiscal deficit is -2.7% of the GDP. In comparative terms, this is the only country—of the four countries compared—that can have some room to manoeuvre to improve social policies.

14.4.2 *Some Shared Elements in the pension reforms*

In international institutions, such as the OECD (2020), certain similar partial reforms can be distinguished in the pensions that could lead to a supposed convergence in the reforms, such as: (1) the rise in the retirement age and the minimum retirement age; (2) incentives to remain longer in employment, after turning 65; (3) restricted early retirement; (4) extension of the coverage of welfare pensions; (5) reduced taxes on low pensions and increase in benefits; (6) diversification of the possibilities of contribution and of obtaining benefits; (7) suspension of adjustments to pensions according to the rhythm of demographic growth of pensioners, among

other measures. This is a list of possible measures suggested by the OECD (2020), but the measures vary from one country to the next depending on the financial situation of the Social Security, the demographic evolution, the forecast of expenditure on pensions, the government in power, the power of unions and the institutional network. Therefore, we are talking about diversification, as we indicated in the initial hypothesis.

In this regard, we will show the diversity of responses between European countries such as Spain and the United Kingdom (for the case of occupational pensions), or between Chile and Argentina. The same welfare models (contributory-proportional liberal or Bismarckian) do not always seem to adopt the same criteria of reforms.

14.5 Characteristics and Reforms of the Pension Systems

In this section we will give an account of the reforms of the pension systems in the four countries treated as specific cases.

14.5.1 Pension Reforms in Spain: The Toledo Pact

In the case of Spain, the pension system has been undergoing reforms since 1995. The reform is known as the Toledo Pact and it has been followed by successive subsequent reforms, in 2005, 2006 and 2011. The negotiation of the Toledo Pact has failed as a result of the political deadlock (2015–2020) and the parliamentary insufficiency to implement it. Today, due to the instability in the Spanish Parliament and the strong discrepancies between unions and political parties, it is difficult, but not impossible, to renew the Toledo Pact. However, all the actors positively assess the Toledo Pact, from 1995 to today, because it entailed creating a long-term political commitment between the Right and the Left. This commitment is explained by the nine million pensioner voters conditioning the political vote: no political party can dispense with this huge electoral force. This seems to be a common problem in other European countries, pursuant to the ageing of the population. Another political achievement of the Toledo Pact has been the creation of a Parliamentary Board (which we interpret as strong institutionalisation) and the commitment to negotiate said pact every 5 years.

The chief goals of the Toledo Pact in 1995 and in its successive reforms can be summarised as follows (De la Fuente et al. 2018):

- To raise employees' contribution to the Social Security to access pensions. It has gone from 2 to 15 years in recent decades and now the calculation of the whole work life is being discussed, although it is difficult to come to an agreement on this point as a result of the contributory shortages of many workers.

- The second achievement has been the fight against the underground economy and the persecution of fiscal fraud in order to improve the financing of retirement pensions, unemployment protection and Social Security.
- The third objective was to delay the “de facto” retirement age. The legal age was 65 until the 2011 reform. However, the average de facto retirement age is 63.3, since many large companies use early retirement to restructure their staff. Part of the early retirement is covered by unemployment benefit and part is paid by the company until the employee reaches 65. From that age onwards the pension is covered by the Social Security. The last pension reforms in 2013 sought to extend the formal retirement age to 67.5. This goal will be reached gradually.

The current discussion of the reform of the Toledo Pact includes, with a narrow margin of consensus, the following objectives; (1) Extension of the legal retirement age: 65–67.5 (measure already passed by the government). The person must have contributed for 38.5 years to obtain 100% contributory pension. The progressive application would culminate in 2027; (2) Encourage delayed retirement (for every year delayed—65 years—the future pension increases by 2%); Increase the number of years in the calculation basis from 35 to 37 years for maximum pension for those born after 1957; the minimum number of years of contribution will be 15, to receive 50% of the pension; (3) The elimination of the Sustainability Factor (introduced in the 2011 reform) is being discussed, which entails an adjustment as the population ages, in such a way that 5% more life expectancy reduces the initial pension by 5% (this was to come into effect in 2019, but the socialist government froze this measure this year).

In 2011 the *Assessment and Reform Report of the Toledo Pact*, published by the Ministry of Employment, defended the need to reach a financial balance, as claimed by the European Union. To do so we must diversify sources of finance, increase the Reserve Fund, guarantee contributory pensions; prolong work life due to the ageing of the population and because of life expectancy; mobilise and guarantee the integration of women into the workforce; protect the most vulnerable groups: widow and orphan benefits; fight against fraud and the underground economy; strengthen the principle of “contribution”; promote complementary systems through tax allowances; legally channel migratory flows to avoid social dumping.

The fourth objective, achieved in the first Toledo Pact in 1995, was the funding of non-contributory pensions, through general state budgets. This affected a large number of housewives (Martín Artiles and Molina 2015).

Fifth, flexibility in the retirement age was another seemingly important achievement of the first pact. This consisted of the possibility of a person aged over 60 being able to partially retire with a part-time work day, and a younger person with a hand-over contract would take their place. But this measure has not been very successful. Lastly, another important achievement was creating a Reserve Fund for pensions, provided in 2005 with 23 billion Euros, which would act as a buffer in periods of crisis; effectively this is how it was used during the economic recession from 2008 onwards, and today it has been practically fully spent.

In February 2011 a tripartite agreement was made between the socialist government, the Confederation of Employers and Industries of Spain and the *Comisiones Obreras* and *Unión General de Trabajadores* trade unions. The Social and Economic Agreement is still in force. In it, the parties committed to economic growth, employment and the guarantee of pensions, as well as the progressive increase of the calculation base of the contributions from the last 15 to 25 years of work life, to obtain 100% of the pension.

Likewise, in November 2013, the Popular Party (PP) government unilaterally passed a basic reform that affects the revaluation of the pensions, up to then indexed in the Consumer Price Index (CPI), consisting of: (1) The revaluation index (from a minimum of 0.25% to a maximum of 0.5% of the CPI); (2) The Sustainability Factor, linked to demographic criteria, involves a reduction in the average pension as life expectancy increases. But with the change to a socialist government this Sustainability Factor has been frozen and the price index has been applied again in 2020.

Individual pension plans and occupational capitalisation pensions, both considered to be complementary pensions, have received a certain boost in recent years. This is precisely one of the goals of the European Union to diversify the sources of funding of the pensions. But these pensions have not had the success, or the importance they have in Anglo-Saxon countries. There is a considerable difference between Spain and the United Kingdom. The occupational pension systems have not been successful in Spain, France or Italy, despite it being a policy suggested by the European Union and its Multi-pillar Welfare State project. The Negotiated Occupational Welfare State does not fit well with countries with many small companies, due to the weakness of the representation of unions and employers, the weakness of the collective negotiation and the scarce participation of workers in production profits. For this reason, in Spain there are limited negotiated pension plans in large companies, while the centralised and generally effective collective negotiation system (*erga omnes*) covers all workers (80%) with the force of the law (Martín Artiles et al. 2016).

14.5.2 Trends in the United Kingdom

The majority of current debates about the pension system in the United Kingdom are conceived in the context of the growing concern for the ageing of the population and the financial sustainability of pensions, on the one hand, and the political responses which since the 1970s have been inspired by the neoliberal ideology that questions the cost of the ageing of the population and the role of the State in providing pensions, on the other (Foster 2017; Grady 2016; Naczyk 2018). The Office for National Statistics (ONS 2015) estimates that the population aged above 65 in Great Britain will grow twice as quickly as the population of working age, representing almost one quarter of the population by 2037, with the consequent changes in the proportion of contributors to the pension system compared to beneficiaries of the

system. This represents a fundamental challenge for the future sustainability of pensions in the United Kingdom (Hofäcker 2015).

Pensions in the United Kingdom are a complex and mixed system. They can be classified into three groups: (1) state pensions, which can be the “basic state pension” and “second state pension” (S2P); (2) private occupational pensions, which can be “defined benefit pensions” and “defined contribution pensions”; and (3) individual/personal private pensions, which can be pensions of interested parties (*stakeholders’ pensions*), and *self-invested personal pensions*.

This section will focus on the first two pension groups due to their greater relative importance within the system. We will begin with state pensions. The modern basic state pension, known as the “Old Age Pension”, was introduced in Great Britain in 1909 under the Old-Age Pensions Act 1908 and it was aimed at preventing poverty in people’s old age. It was the first step towards establishing a Social Security system with unemployment benefit and healthcare, introduced through the National Insurance Act in 1911, which was established with the creation of the British Welfare State in the period following the Second World War. State pensions are financed through contributions to the National Insurance, related to income, and participation in the system is compulsory.

There is agreement that the most important change that took place in state pensions since the 2007–2008 financial downturn is the implementation of the new *single tier* state pension. From 2016 to 2017 onwards, the basic state pension and the second state pension were replaced by a new single tier state pension for all those people below retirement age. The Department for Work and Pensions of the United Kingdom introduced this change in a rather euphemistic manner: “*The creation of the single tier pension will essentially reform the state pension system. It is designed in the light of a modern society, with a clearly defined function: to provide the bases to support people who are saving for their retirement*” (DWP 2013: 27). In short, the proposed system eliminates the second state pension that had offered a top-up, related to income, on the basic state pension based on the nominal social security (Berry 2016). The main difference that exists between the previous versions of the system and the new proposed system is that it will not be essentially universal, with a greater possibility of authorising unpaid activities than was possible in the past.

However, from a more critical perspective, Berry (2016) rightly points out that by redefining the purpose of the state pension as a means for individuals to save for retirement, the reform is a subtle way of reducing social welfare via which the State withdraws from any attempt to provide a true income-replacing benefit for pensioners, instead of providing a context in which individuals can become self-sufficient and silently contribute more to the system. According to the opinion of some academics, this is another expression of the “financialisation” process of the social welfare benefit in the United Kingdom, which started in the 1970s and has intensified since the financial downturn and the implementation of austerity programmes (Berry 2016; Langley 2008). In the case of pensions, financialisation refers to the notion of policy according to which “*individuals [not the State] must assume the personal responsibility of their own long-term financial security*” (Berry 2016: 1).

As we will see, financialisation is also a characteristic observed in the (private) occupational pension system and it is the rationality that explains the greatest change that has taken place in this system with the introduction of “automatic registration”.

In the United Kingdom, occupational pension plans are agreements established by employers of all sizes to provide pensions (and other benefits related with the workplace) to their employees. These were created by virtue of the Pension Schemes Act 1993, the Pensions Act 1995 and the Pensions Act 2008. Occupational pension plans are financed through a combination of contributions from employers and employees. Therefore, although employers and workers contribute, they are essentially capitalisation plans. Employers’ contributions generally represent a greater proportion of total labour costs than employees’ contributions. These pensions are financed through contributions of at least 8% of the employees’ gross salaries, with at least 4% paid by the employee, 3% by the employer and 1% by the State through a reimbursement in national security contributions. Due to the decentralised nature of collective negotiation in the United Kingdom, the large majority of occupational pension plans are offered at company level (Naczyk 2018: 85–86).

‘Occupational welfare’ has a longstanding history in the United Kingdom dating back to the nineteenth century with the establishment of charity associations that granted rights to benefits for illness, accidents and deaths, as well as old age and unemployment benefits, but which, nevertheless, excluded the lowest strata of the labour force (Harris 2004). Occupational pensions are prior to statutory pensions. Until the 1970s, occupational pension plans, which were quite ‘generous’ and were barely regulated by the state, essentially favoured qualified workers who employers, through their contributions to the system, wanted to retain; with “early leavers” (workers who were going to be dismissed) effectively subsidising the pensions of the end salary of permanent ‘white-collar’ workers (Naczyk 2018: 84).

Occupational pensions started to change dramatically with the establishment of individual/personal pensions in 1988 (the third pension group in the initial classification) by Margaret Thatcher’s government, following the enactment of the Social Security Act in 1986. According to Pierson (1994), these laws afforded workers the possibility of changing their occupational pension or second state pension and signing a new pension plan (actually a personal investment plan) with other private service providers, such as insurance companies, banks and building societies and unit trusts.

In 2015, there were more than 6000 professional regimes in the United Kingdom, of which 5000 were in deficit. The employers tended to offer their employees access to an occupational pension plan with defined benefits, generally based on the end salary, in other words, usually the employee was promised a pension of a fixed proportion of his/her salary calculated at the time of retirement. With the increase in the longevity of the population and the drop in interest rates, this scheme gradually became unsustainable, and many employers started to exclude new employees from the scheme of defined benefits as well as those who were offered pensions of defined contributions. Under this agreement, the employer (and sometimes the employee)

makes regular payments to a private pension fund, and the fund is used to buy a pension when the employee retires (DWP 2010).

The most important change that has occurred with the occupational pension plans since the financial downturn is the introduction of the “self-registration” system in 2018. The Pensions Act of 2008 stipulates that, from 2018 onwards (depending on the size of the company), all employers will be entitled to automatically self-register their workers in occupational pension plans, thereby transferring more responsibility to employers to guarantee that their employees are registered in the business plan. Those workers who do not want to be registered will have to ‘opt out’ of their employer’s occupational pension plan, instead of ‘opting in’ as was the case in the past.

The gradual introduction of the new system sought to eliminate the inequalities in accessing the system, for example, between occupational categories, company size and sectors of activity. The chief inequality is the gap existing between public sector employees, among whom membership of the system reached 87% in 2014, and private sector employees, with only 49% the same year (Naczyk 2018; ONS 2015). In 2014 the average membership in the United Kingdom was 59%. The key question from the perspective of this chapter is that the new ‘self-registration’ system introduced to expand the occupational pensions, guarantees that the majority of people employed save into a ‘private’ pension plan, in addition to the state benefit to which the person is entitled (Berry 2016). This analysis is consistent with the hypothesis of the financialisation (Watson 2009) of the pension system presented above, in which individuals, not the State, assume greater responsibility for their own financial security; this can also be observed in other areas of British social policy.

14.5.3 *Characteristics of the Reforms in Chile*

In order to present the specific characteristics of the reforms and re-reforms of the social welfare systems in Argentina and Chile from 2008 to date, it is important to note that both countries were categorised as belonging to the group of pioneering countries with Uruguay and Costa Rica, since their welfare systems compared to other countries on the continent were established between the second and third decade of the twentieth century, between 1919 and 1930 (Mesa-Lago 2000).⁶

Considering the historical evolution of the Chilean welfare system, Arenas de Mesa (2010) defines a first stage between 1924 and 1950 based on five pension funds which grouped together in the first three the majority of dependent workers, and in the two remaining funds, the Armed Forces and the police. For the 1950s, the pension system was characterised by the coexistence of a multiplicity of regimes

⁶ Specialists qualified the Latin American countries in *three groups: pioneering-high, intermediate and late-low*. In general, the conditions of access to pensions were liberal especially in the pioneering-high group. This author points out that “*said systems suffered stratification, high costs, an increasing deficit, financial and actuarial imbalance*” (Mesa-Lago 2004: 13 & 19).

(150) and by institutional atomisation (35 funds). In the second stage, starting in the 1970s, the system sought to converge with the standardisation guidelines formulated in the Beveridge Plan. For this decade, Chile had one of the most advanced systems: it covered all the contingencies, it presented high coverage and afforded generous benefits. However, to characterise the system of this period we use the metaphor of Mesa-Lago who referred to this as a bureaucratic labyrinth, legally complex and stratified, which was incubating considerable inequalities and suffered financial and actuarial imbalances.

The third stage refers to the reform leading to replacing the distribution system with a capitalisation system during Pinochet's dictatorship in 1981 (Decree Law 3500 and 3501). In Chile the welfare reform replaced the distribution system of defined benefits with a compulsory individual capitalisation system, of defined contributions, paid for by the workers into a personal retirement account and managed by private anonymous associations: the Pension Fund Managing Companies (AFP).⁷

One of the characteristics of this system is that not only is any idea of social solidarity—the fundamental principle governing distribution systems—lost, but, in the capitalisation system of individual accounts, the AFP become managers of the accumulated funds. Some authors highlight that the essential characteristic of this new system is that the contribution is only made by the worker, freeing the private company of any contribution. In 2002 a reform was introduced which allowed five pension fund options to invest through individual accounts; under this option the member could choose the type of investment and level of risk in which their funds could be used. The introduction of multi-funds meant pension managers became important actors in local and financial markets. According to Mesa-Lago (2009) the impact of the intervention of these AFP in the Chilean economy meant that 28 years would pass, in democracy, before establishing the reform of the welfare system in 2008.

In addition to the problems highlighted by the ILO, such as the lack of solidarity and coverage, gender inequality and the lack of representation of insured parties, countless diagnoses have reflected the increasing inequality that said pension system introduced into Chile; among those most mentioned there are not only the changes of parameters of the contributory conditions to retire, but the use of a life expectancy table differentiated according to sex is indicated, as well as the use of a complex calculation methodology which lays the foundations of unequal treatment for women (Yáñez 2010). In general, there is a serious coverage problem for those developing independent activities, leaving more than half of retired people in conditions of vulnerability and poverty.

The re-reform of the welfare system introduced during Bachelet's government in 2008, can be summarised in the return of the role of the State as guarantor of a

⁷The establishment of the retirement system freed the employer from making contributions to the employee's individual account. Furthermore, the roles of the market and the State in the management of pension systems also changed, assigning the former their financial management, and the latter their regulation and supervision, as well as the focused and welfare relief of old age poverty (Uthoff 2008).

certain conception of universal rights and the creation of the Solidarity Pension System (SPS) which, via a new public institutionality, would implement measures to increase the welfare coverage of vulnerable groups such as youths, women⁸ and independent workers. Following the international indications during Bachelet's government, a commission was created for the analysis of the welfare reforms representing wide social sectors seeking the legitimacy of same.

Although the reform persists in sustaining the individual capitalisation system of the former Pinochet regime, a series of changes are introduced which mean not only the reduction of costs, but also achieving better pensions for members, as well as strengthening the Voluntary Welfare Savings (APV). The conditions to access basic solidarity pensions (PBS) and the Solidarity Welfare Contribution (APS) include requirements such as being part of the 60% of the population with lower incomes and having spent a minimum period of 20 years in the country including four out of the past 5 years, and having turned 65 both for men and women.⁹ The reform has led to a new institutionality that establishes the Pension Reserve Fund (FRP), with an initial contribution of 60.45 million dollars at the end of 2006.

Regarding said reform, some analysts highlight its benefits since for some it is an "integral system" that reconciles the contributory dimension with the non-contributory dimension and consolidates the role of the State, while gender and age inequalities are adjusted for young people (Arenas de Mesa 2010). For other analysts, the system follows an unbalanced logic because this new "solidarity" state pillar is too similar to social welfare and jeopardises the celebration of the re-reform (Birgin and Pautassi 2001). Or from a much more dissatisfied perspective, such as that of Soto Pimentekl (2015), the reform perpetuates a neoliberal retirement model that operates according to the principles of equivalence, focalisation and centrality of the market, with SCI and the capital market being the distribution mechanisms, through their free operation via their own rules.

In any case, some authors highlight the introduction of the non-contributory element of financing with fiscal resources, under the objective of guaranteeing the welfare protection of all those people excluded from the private contributory system (Yáñez 2010: 20).

⁸The subsidy for saving for old age in two groups at greater risk as regards their pension savings funds: women and young people. The law establishes a subsidy for working women, through the "child allowance", and for young people, through the "youth employment subsidy". In both cases, a sum of money is placed in the pension savings account (Soto Pimentekl 2015).

⁹The APS is a supplementary payment in addition to self-financed pensions from the private system. It is granted to all pensioners who receive pensions lower than a minimum sum established from 1 September 2009 at 150,000 Chilean pesos. This sum gradually increased until 2012 when it reached 255,000 Chilean pesos per month, the equivalent to approximately 150 dollars per month at an exchange rate of 500 Chilean pesos per dollar (Yáñez 2010: 21).

14.5.4 *The Welfare System in Argentina*

The Argentinian welfare system evolved from the beginning of the twentieth century to 1946 through pension funds for each sector with a similar result to Chile in terms of its fragmentation, the unequal conditions of access, and sums of contributions and benefits (Panigo and Médici 2013). In the mid-1940s the system extended to all workers until 1969 when it was unified and began to be governed by the National Social Welfare System (SNPS).

In the mid-1980s, diagnoses weighted a range of factors referring to the financial sustainability problems of the SNPS; among these, analysts pointed out the drop in real salaries in inflationary conditions and the subsequent increase in unemployment after the collapse of the occupation structure towards informality; with a growing expansion in the services sector and in self-employment; the growing degree of informality added to the old problem collection bodies had to oversee the activities of self-employed people or independent professionals (Lo Vuolo 2008). The diagnoses also weighted the weight of the aging of the population, the direct impact of which affected the support rate (active/passive relation) and the exhaustion of the welfare surplus, considering its use for financing state functions other than social welfare. All of these variables made it impossible to meet the legal defined benefit parameter of the pension credit equivalent to 82% of the salary of a worker in activity in a similar position (Bonari et al. 2009).

In a context of complicated legislative and union negotiations, in 1994 two changes occurred. One was an important change regarding the age parameters to access the pension and another one regarding the necessary years of contribution. The retirement age increased from 55 to 60 for women and from 60 to 65 for men. Furthermore, the requirement to contribute more years to the system increased from 20 to 30 years of contribution. In addition, Law 24.241 introduced the option to retire in one of the two pension systems, distribution or capitalisation. On the one hand, a tripartite public distribution system, managed by ANSeS (National Social Security Administration) and, on the other hand, an individual capitalisation regime, managed by Retirement and Pension Fund companies, known as AFJP. The coexistence of both systems, distribution and capitalisation, led to a *mixed* social welfare system.

In this way, the State guaranteed a minimum contributory pension perceived as the Universal Basic Benefit (PBU) via which similar defined benefits were granted to all insured parties, according to age and years of contribution. Furthermore, via private capitalisation, an additional pension was paid. Both contributory options operated in addition to a non-contributory pension system. But the mixed system imploded with the severe financial downturn in 2001, and despite adjustments and partial modification since 2003, the system was reformed again in 2008.

Following the severe socio-political and economic crisis in 2001, a social redistribution was promoted, implementing non-contributory social protection policies. The aim was to universalise pensions for elderly adults who have not contributed the sufficient number of years to the distribution system. In this regard, it is important

to note the way in which the idea of work informality has no longer been problematized as a voluntary choice of workers but as a problem in the application of macroeconomic policies. That is why it is considered a *reparatory* measure, as it compares formal workers with informal workers (Hopp and Lijterman 2019).

The welfare re-reform of 2008 (Law 26.425) entailed the end of the mixed system implemented in 1992, withdrawing the private capitalisation system, and returning to the state distribution system. From January 2009, all members were transferred to the public distribution system SIPA (Argentinian Integrated Welfare System) managed by ANSeS with the transfer of funds from individual AFJP accounts to the Sustainability Guarantee Fund. Known as the *Welfare Inclusion Plan or Programme*, the strategy to extend the welfare coverage through early retirement programmes or moratoria helped to rectify and increase the number of beneficiaries. The Welfare Moratorium granted a pension to all adults of retirement age in December 2004, who did not have the required 30 years of contribution, through the implementation of a monthly discount of the missing contributions. A second strategy, complementary to the previous one, was the offering of *early retirement* which enabled those who were less than 5 years from retirement or were unemployed (but had contributed to the system, although the years of contribution were not complete), to receive 50% of the pension.

14.5.5 Comparative Summary

Summarising the compared models, we observe that:

The first substantial difference between Europe and Latin America lies in the degree of institutionalisation of the pension systems. In Europe, the institutionalisation is strong, it is linked to rights and duties, to citizens' rights and with the contributory control of employment in social security, there are fiscal sanction regimes. In America, on the contrary, the high volume of informal employment undermines the social protection institutions (Table 14.5).

1. Contributory pensions in Spain are the main protection system for pensioners, but they have financial sustainability problems because new jobs have low salaries and because of the high number of temporary contracts. There are also political difficulties to renew the Toledo Pact agreements. One of the chief problems lies in the low salaries in new jobs—created during the European recession and afterwards—for young people. One of the paradoxes is that the average pension paid is above the average salary of the new jobs, which is a serious problem for the future. For example, in 2017 the average gross salary was lower (1271.88 Euros) than the new average retirement pension (1318.47 Euros), which threatens the sustainability of the pension system: a true intergenerational solidarity

Table 14.5 Pension systems

	Spain	UK	Argentina	Chile
1. Contributive pensions	Most important system	Mixed. Public system financed by taxes and complementary Occupational and private pension of capitalisation	Public fragmented	Not at all System of capitalisation Atomisation
2. Gross replacement rate Public and Private	72.3%	43.5%	83.7%	36.2%
3. Age of retirement	Modified 65 up to 67.5 years in 2027	Modified 65 years up to 68 in 2034	65 years men 60 years women	65 years men 60 years women
4. Gender Inequalities	Composition effect in labour market New system for calculation of women's contributions: improving more equality	Composition effect in labour market	Composition effect in labour market	Composition effect in labour market
5. Occupational pensions	Weak, it is important only in big companies	Very Important at plant level	Weak	Important at plant level
6. Private pensions	Very weak	Important Mixed: Public, Private	Weak	Important. System of capitalisation
7. Negotiated Welfare	Pick level Agreement since 1995. Pacto Toledo	Only at company and sectoral level	At sectoral level	Only at company level
8. Informal employment effect	Minimum non-contributive pensions (Lismi) Neo-assistencialism	Low Neo-assistencialism	Neo-assistencialism	Barrier in system of capitalisation Neo-assistencialism

Source: Own elaboration

crisis.¹⁰ This is a similar problem in Argentina. Currently, new salaries are lower than retirement pensions. In other words, new salaries are not sufficient to support the fiscal pressure entailed by pensions, which threatens to render the pension system unsustainable or to seek new financing options, such as the idea of the Multi-pillar State. However, these changes arise again in the Argentinian debate, especially with the commitments made due to debt with the IMF which advises labour, fiscal and pension reforms.

¹⁰The response to this problem has recently, in January 2020, been a rise in the minimum inter-professional salary by decree of the socialist (Podemos) government.

2. The net replacement rate¹¹ of public and private pensions is one of the reforms that threatens the purchasing power of pensioners. The replacement rate according to the contributions paid to public and private regimes is proportionally high in Argentina (83.7%) and in Spain (72.3%), that is, in the regimes where the Bismarckian contributory-proportional system dominates. On the contrary, it is very low in the United Kingdom (43.5%) and in Chile (36.2%), where private capitalisation pensions dominate.
3. The retirement age is being extended in Spain; with the last reform it began a progressive increase from 65 years to 67.5 in 2027. In the United Kingdom it has gone from 65 to 68 to be reached in 2034. In Argentina it has not changed since 1994. In Chile the retirement age is 65. This may be an important matter in the years to come as a result of the increase in life expectancy and the fostering of “active aging” policies.
4. Another problem is the gender inequality among pensions, which can be explained by the composition effect of the job and the discontinuous trajectories in women’s careers, a problem shared in all the countries. In the same way, gender inequalities related to pensions are debated in both continents.
5. Occupational capitalisation pensions are important in those countries with a neoliberal political tradition, such as the United Kingdom and Chile, typical models of the financialisation ideology. In these two countries the occupational and private pension funds have financial sustainability problems, both due to their fragmentation and due to the low yield of the capitalisation funds in a long context of low types of financial interest. In the case of Chile, there is a social movement to return to the public pension funds guaranteed by the State. In the case of Spain, occupational pensions have not been successful, despite being included in the Toledo Pact in 1995 and in the consecutive years. The financial downturn has halted its growth since 2007, due to the reduction in profitability of the financial capital. Therefore, there is no convergence between Spain and the United Kingdom. The well-known convergence in some fora is only rhetorical as a political discourse (OECD 2020). The reality is that in Spain the State covers the deficits through special taxes. Moreover, the trend towards capitalisation systems encounters an obstacle in the growth of informal employment in the countries in Latin America. As was discussed in Chap. 2, the informal sector has been growing considerably for decades, partly due to *work flexibilisation*, typical of the neoliberal policies applied in the region.
6. Individual private pensions are equally important in liberal countries such as the United Kingdom and Chile, ideal type models of financialisation capitalism; this is not the case in Spain and Argentina.
7. Negotiated Welfare, according to Trampusch (2007) is only important in the United Kingdom and somewhat in Chile. This model is inspired by the principle of the individual right of the insured party, rather than on the ownership of the social rights of citizens. In Spain, the inclusion of pensions in the collective

¹¹“The net replacement rate is defined as the individual net pension entitlement divided by net pre-retirement earnings, taking account of personal income taxes and social security contributions paid by workers and pensioners.” See, <http://oe.cd/pag>. (OECD 2020).

negotiation is only registered in large companies; occasionally, pension plans are registered for small socially insured companies. But an important difference compared to other countries is the social agreement (*pick level*) reached with the Toledo Pact. The Toledo Pact has a profound political meaning in terms of legitimisation of the Bismarckian contributory-proportional model, based on inter-classist vertical solidarity. In addition, the social pact props up social order, demonstrating the importance of unions.

8. Lastly, informal employment presents an access problem for workers to their future pensions. In the United Kingdom informal employment is not of great importance. In Spain it is relatively moderate and the solution is the providing of a minimum pension. The majority of those who receive it are women. In Chile and Argentina informal employment is a serious barrier that hinders access to capitalisation pensions. A response to the problem of informality, of precariousness in employment and of the *working poor* is the growth of neo-welfarism. Neo-welfarism appears to be a generalised trend in the four countries to help severe poverty, which is often in addition to voluntary assistance, religious institutions and NGOs; hence the growth of the third sector.

14.6 Conclusions

As regards the general hypothesis, we have shown that the United Kingdom and Spain share reforms inspired by the idea of the Multi-pillar state, which promotes occupational welfare via capitalisation. However, the evidence shows us that actually the two countries are very distant from each other. In the United Kingdom occupational welfare via capitalisation is very important, while in Spain it is relatively insignificant. But it is part of the political discourse on the sustainability of the welfare state, although a rhetorical discourse, despite being included in the Toledo Pacts. In a certain way, as pointed out by Adelantado and Calderón (2005), we are facing the *same* (rhetorical) *response to similar problems*, but in our opinion the results are different. In practice, in Spain, unions defend the traditional contributory-proportional public system, which continues to be important as an inter-classist means of solidarity, although questioned by the crisis of inter-territorial solidarity. The political right has seen how the sustainability of the welfare state is an important market of votes in the elections. Neoliberal policies have been applied more in the labour market (flexibilisation) than in the welfare state.

Argentina and Spain share a contributory-proportional pension system, also inspired by the corporate model, with the participation of unions and employers which defend the well-known Bismarckian model. Although in the Argentinian case it is burdened by the high volume of informal employment and the low institutionalisation of the pension systems, which hinder inter-classist solidarity due to the strong dualisation of its labour market (insiders, with formal work/outside workers with informal work). In Chile, the pension system via capitalisation is very fragmented,

representing a much more unequal and neoliberal system, which highlights an individualised model with low solidarity. But today this is highly contested by a social and union movement that defends solidarity through the role of the state.

14.6.1 Final Discussion

The analysis of the four countries shows that in a certain way there are similar discourses (*spill over effect*), but with different contexts and policies according to the society and institutional context, the government, the power of unions, social movements, but also the demographic context. As a consequence, the reforms have not been uniform. But there are underlying ideological trends which drive the reforms towards a multi-pillar model. These trends, as we will explain below, are: (1) the organic solidarity crisis; (2) the inter-classist solidarity crisis; (3) the inter-generational solidarity crisis and (4) the inter-territorial solidarity crisis. We could state that the trends of the reforms are conditioned by these four solidarity crises.

First, we can discuss the “organic solidarity” crisis, which appears in the reconstruction of the former “mechanic solidarity”, such as mutual support, inter-family help and voluntary help. This is giving rise to the development of territorial solidarity policies and the growth of the third sector, which has been called “second welfare” by some authors (Pavolini et al. 2013).

Second, we can visualise *the inter-classist vertical solidarity* that has led to the rejection of fiscal pressure and to claims to reduce taxes, which has been driven particularly by liberal, conservative and even social democratic parties. In response to this, individualist values and meritocracy have increased; those with higher incomes reject the rise in taxes. A reflection of this is the trend towards the transformation of language, in such a way that we have gone from “*citizens’ rights to the rights of the insured party*” (Antón 2009).

Third, *inter-territorial solidarity* also went into crisis after the 2007–2008 financial downturn. The growth in nationalism and regionalism in many European countries has caused a rejection of the transfer of resources between rich and poor regions, between countries from the north, greater contributors to the coffers of the European Union, and those from the south of Europe.

Lastly, another element is the *inter-generational solidarity crisis*. Salary devaluation during and after the Great European Recession has affected the salary incomes of young people, and the quality of their employment. An example of this is the “*working poor*”: workers who are poor despite having work, have increased in Europe.

In short, after presenting the characteristics of the systems in Chile and Argentina and observing the trends towards occupational pensions in Spain and the United Kingdom we believe that it is essential that whatever welfare reform is implemented, this must be publicly and widely discussed, seeking maximum consensus through commissions that adequately represent the sectors involved. Publicity of the debate is important for citizens’ education, as well as to legitimise the reforms, so that

different future governments do not undermine that which has previously been achieved (Mesa-Lago 2004: 100).

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Part VI

Conclusions

Chapter 15

By Way of Summary: Substantive Contributions and Public Policies for Dealing with Social Inequalities



Sandra Fachelli and Pedro López-Roldán

Abstract The final chapter aims to summarize the main substantive contributions of each of the preceding ones and the public policies that could be applied to deal with social inequalities. It also presents a general proposal for a future research programme in comparative analysis of social inequalities between Europe and Latin America.

15.1 Substantive Contributions and Public Policies

In this section a brief text summarizes the main contributions and conclusions of each chapter of the book. We have also included the result of a collective synthesis work carried out with the authors of the book, and in which we have tried to harmonize the different issues addressed in the book by presenting synthetically the theme that each chapter examines, the inequalities observed in each field, the policies that could be established to face such inequalities and the political-administrative bodies that would be in charge of implementing these policies.

S. Fachelli (✉)

Departamento de Sociología, Universidad Pablo de Olavide, Sevilla, Spain

Grupo de Investigación en Educación y Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain

e-mail: sfachelli@upo.es

P. López-Roldán

Centro de Estudios Sociológicos sobre la Vida Cotidiana y el Trabajo – Instituto de Estudios del Trabajo, Universidad Autónoma de Barcelona, Barcelona, Spain

e-mail: Pedro.Lopez.Roldan@uab.es

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15.1.1 *About Social Models*

In the introduction to this book, Chap. 1 presented the context of the INCASI project, aimed at creating and consolidating a network for the comparative analysis of social inequalities. It presented the general conceptualization of social inequalities and the Analytical Model of Social Inequalities and Trajectories (AMOSIT) that oriented the work of the network. From this general analysis model, the concept of a social model is highlighted as a global typological and structuring concept of multiple elements that characterize social inequalities in each European and Latin American country and the pre-distributive and post-distributive policies for dealing with them. This proposed classification formed the basis for the rest of the topics and studies covered in the book.

This conceptualization of social models identifies the institutional characteristics of labour market coordination that explain pre- and post-distribution inequality, providing a conceptual framework to facilitate the comparison of institutions and inequalities between the countries participating in the INCASI project. Relevant indicators are put in play to characterize four social models that correspond to four types of coordination of economies:

1. Uncoordinated informal economies, which have high levels of informality, intermediate levels of collective bargaining coverage, low social expenditure and low unemployment coverage. These include Argentina, Uruguay and Brazil. Corrective averages (post-distribution) are not very powerful and start from high levels of inequality.
2. Neo-corporatist coordinated economies, which have low rates of informality, the highest levels of collective bargaining and social spending coverage and the highest unemployment coverage. These include the countries of the Ghent System (Belgium, Sweden, Norway, Denmark and Finland) and the Germanic countries (Germany, Austria and the Netherlands). Corrective measures of inequality are observed in changes in the post-distribution Gini index, and these countries are the ones with the lowest inequality.
3. Uncoordinated economies, which are characterized by the decentralization of collective bargaining at company level and informal employment (widespread in Latin America). There is a sharply dualized segmentation of labour relations marking a clear difference between protected workers (insiders) and unprotected workers (outsiders), leading to low rates of unemployment protection, a medium level of informal employment and high levels of inequality. These include the United Kingdom, the United States and Chile. The corrective measures have effects but these are lower than in coordinated or semi-coordinated economies.
4. Semi-coordinated economies, which have collective bargaining systems that mix centralization at the sector level, semi-decentralization at the regional level and bargaining at the company level. In those countries, trade unions hold political influence and capacity for mobilization. These countries have a medium level of social expenditure, informal employment and unemployment protection. They include Spain, Italy, France, Greece, Portugal and Slovenia. Corrective measures manage to operate and reduce the post-distribution Gini but to a lesser extent than in coordinated economies.

This analysis shows a transformation of the State in Europe that leads to a deterioration of the social protection system, a change that is characterized by a socialization of risk indicative of a shift from the benefactor-protector paradigm to the active social state paradigm. In short, Europe is slowly approaching Latin America and is not on the right track. Therefore, the recommendations for both continents are the same: (1) a high coverage rate of collective bargaining helps to reduce inequalities; (2) the employment rate alone does not reduce inequalities, since jobs can be unstable, temporary, part-time, informal and poorly paid; and (3) extreme measures should be applied to lower the high rate of informal employment because it affects both pre- and post-distributive policies.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed
Pre-distribution institutions and post-distribution institutions
Inequalities observed
Income inequalities: pre-distribution Gini index, post-distribution Gini index, occupational rate and informal employment.
Most important policies for addressing these inequalities
Re-orientation of state social policies to the benefactor-protector paradigm
Collective bargaining coverage
Expenditure on social policies
Unemployment protection rate
Important bodies for carrying them out
State institutions
Trade unions
Employers' associations
Institutional arrangements for social dialogue: an advisory board for industrial relations

Source: A. Martín-Artiles, E. Chávez-Molina and R. Semenza (Chap. 2)

15.1.2 *Labour and Educational Inequalities*

15.1.2.1 **Segmented Labour Markets**

Analysing social inequalities in the labour market from a comparative perspective, the first general conclusion is that the stratification of countries' labour markets is structured according to two main factors: socio-economic development and employability. Countries can therefore be clustered into four types: less development with more or less employability; and more development with more or less employability.

A comparative analysis of labour market segmentation, in particular between Spain and Argentina, shows a common general pattern of structuring of their labour markets that typifies employment into four segments. In this typification, the two countries show great similarity in the percentage distribution and, above all, in the dominant profiles. In both cases, moreover, there is a correspondence between the structure of the labour market and the characteristics of the supply and demand

sides of the labour force. It is important to note that in both Spain and Argentina the types of segmentation are the relative expression of the labour realities specific to each region, so the grouping reflects characteristics with very similar features despite the different contexts of development and social regulation. The occupational and educational structure differ, and informality is a very distinctive phenomenon in Argentina, but despite these different socio-productive contexts, the structuring of inequalities in the labour market shows many common elements in the factors of differentiation and types of employment. This result raises the question of the extent to which other countries of the two continents confirm, qualify or contradict this common pattern of segmentation, which can be clarified by future research.

The origin of unequal working conditions lies in the model of capitalism and the type of social organization in the division of productive and reproductive tasks. The similarities found between the two countries therefore transcend the particular stage of economic development and the structural model of the economy. Fiscal, economic and labour policies and social welfare models naturally play a decisive role in correcting and reducing inequalities, as shown in the previous chapter. The pressing reality requires major reforms to prevent and eradicate these extreme situations and to offer decent jobs with guarantees for independent social life without deprivation. Passive and active labour market policies should be designed to pursue this objective of improving the quality of work and mitigating the effects of segmentation. However, if the policies reproduce the employment model and the productive structure that encourages it, they will not be sufficient to change the direction and avoid underemployment of the more educated population. In the long term, in order to reverse the inefficient and unequal productive and occupational realities that persist over time in both countries, policymakers will have to design structural reforms in combination with other coordinated policies of public and private investment in the economic, social and employment sphere. For this change of direction, the solution must also include bargaining and agreements between the social partners.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Inequalities in a segmented labour market

Inequalities observed

The general objective is to reduce the segmentation of the labour market in order to favour stabilization and reduce or eliminate work trajectories of inactivity, unemployment and job insecurity, thus reducing the gap between the primary and secondary segments of the labour market (Eurofund 2019) and generalizing decent work (ILO 1999), also the objective of the United Nations 2030 Agenda for Sustainable Development.

Most important policies for addressing these inequalities

(continued)

-
- (a) Active employment policies aimed at the most vulnerable groups (youth, women, immigrants, people without training and with limited resources) to promote the acquisition of the skills necessary for employability with the best possible conditions. These policies should be accompanied from the demand side by incentives towards employers to hire and stabilize people with these vulnerability profiles.
- (b) In particular, in relation to the qualification needs of the workforce, training policies for employment should be aimed at training the population, especially the most vulnerable people with low educational levels, to help them adapt to technological changes and labour demand through lifelong learning programmes. Vocational training should be aimed at improving the employability of a large number of workers.
- (c) From the point of view of labour market regulation, limits should be placed on regulatory policies that favour the use of contractual flexibility as a business strategy of cost reduction and precarious employment, especially in low-productivity sectors, taking into account multi-layer subcontracting in particular.
- (d) The unequal conditions of employment generated by labour segmentation require compensatory policies in relation to the low individual and family income with which the secondary segment is associated. To this end, the establishment of an appropriate minimum salary would attenuate wage inequalities generated by labour segmentation.
- (e) The implementation of policies aimed at progressively changing the patriarchal and androcentric model of social life is a sine qua non condition for reducing inequalities in the labour market. The equalization of men and women in the labour and non-labour sphere must be fostered through the reduction of wage gaps, work-life balance, incentives, positive discrimination policies, provision of services to families, time use policies, etc.
- (f) Finally, there is a need for a long-term active industrial policy aimed at reorienting the productive structure towards the sectors with greatest productivity and added value, as well as financial policies that help sustain these changes.
-

Important bodies for carrying them out

It is important to promote social dialogue and reach agreements with the social agents and representatives of civil society to achieve commitments to structural changes maintained over time regardless of the ups and downs of electoral and economic cycles. These policies should be adapted to each socio-economic context to take into account the particularities of supply and demand factors that affect the segmentation of the labour market.

Source: P. López-Roldán, R. Semenza and A. Salvia (Chap. 3)

15.1.2.2 Inequalities in Compared Educational Systems

A comparison of three countries with very different social and educational situations serves to illustrate common and diverse dynamics in educational systems. Finland has a long tradition in providing public education, an advanced economy and an education system that has been taken as a worldwide reference after the standardized PISA evaluations. Spain has greater economic backwardness, and although its economy has grown rapidly in the last few decades, it was seriously affected by the economic crisis of 2008. Brazil has an economy that is growing strongly but it started from very low levels and is subject to great regional dispersion, to the point that it is like a small continent. Its education system did not reach

broad sections of the population until relatively recently, and it still has many problems in reaching all social strata and in equality.

Despite the great differences, there are a number of common elements in the three countries. First, a discourse that values education and is guided by the theories of human capital prevails in all three countries; this discourse counteracts, to a greater or lesser degree, a discourse that sees education as a source of citizenship. Second, there is an ambition towards equity in education, although in different ways, e.g. by promoting public education with greater intervention by the State, regulating private schools with public funds and guaranteeing access quotas for students from the most disadvantaged sectors. Third, all three countries have witnessed an education expansion, an increase in female students at all levels of education, and social mobility. However, educational trends and debates in the countries take different forms because of their different historical, economic and social backgrounds and situations.

The global perspective of the three countries also serves to observe the level of discussion and variation in the consensus about the education system over time. Brazil represents an initial phase, with some setbacks which have already been overcome in Spain. Finland stands as an extreme case of an example to follow to reach the maximum education levels. However, it also demonstrates that the conquests and wide consensus attained by citizens can also be destabilized by educational reforms that introduce individualized principles instead of continuing to underscore criteria of collective equality.

Finally, global trends such as educational expansion, feminization of education and a market-oriented, neoliberal discourse in education policies are observed. How these trends are manifested in different societies varies because of their particular social, economic and cultural histories and circumstances. An analysis of statistics and policies reveals certain similarities and differences, but understanding them, the reasons for them and their effects and impacts on each society would require thorough qualitative case-oriented comparisons of the education systems and inequalities in education in their proper historical, spatial and societal frameworks.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Education in Finland, Spain and Brazil

Inequalities observed

Inequalities in educational systems: primary, secondary and higher education

Most important policies for addressing these inequalities

(continued)

Recommendations for Finland:

- To revive education and science by stopping budget cuts and increasing basic funding.
- To move from stop-and-go policies to longer-term development of schemes of education.
- To steer and plan education policies in close collaboration and dialogue with educational experts, researchers and business/industry.
- To restore the cultural value of education in education policies. Recently, education has been seen mainly from an instrumental point of view, leading to a narrowing of skills, competences and general knowledge.

Recommendations for Spain:

- To invest more in early childhood education, a non-mandatory stage that is subject to the economic solvency of families and therefore not available to everyone.
- To reverse the increased fees of university education, which have hindered access to higher education of young people from lower classes.
- To establish measures to prevent school segregation in urban contexts of high segregation, in line with the recent pact against school segregation in Catalonia promoted by the Catalan ombudsman.
- To diversify the curriculum in secondary school to address the unequal learning and life situations of adolescents, with the precaution of not defining stigmatized pathways and ones of little academic and social value.

Recommendations for Brazil:

- To improve early childhood education: smaller schools, greater management autonomy, supplies and educational support for teachers, an enriched artistic curriculum and sports activities.
- To offer all children cultural experiences, which involves guaranteeing the working conditions (supplies and didactic support) of the teachers in order to enrich the humanities curriculum (geography, history, languages, literature and the arts). These contents are instruments of expression and the basis for the teaching of logic and mathematics.
- To offer a scholarship policy at the secondary level to combat dropping out of children from lower social levels.
- To reduce differences between educational institutions, particularly secondary schools, which have a direct impact on university access.
- To create and improve compensation policies both during the school year and during part of the holiday period.

Important bodies for carrying them out

Ministry of education and local education administrations.

Source: J. S. Martínez García, E. Oinonen, R. Merino and G. Peroza (Chap. 4)

15.1.2.3 Sociocultural Changes of the Digital Revolution

This chapter summarizes how the economy is likely to evolve in the field of employment, skills and everyday life in the INCASI project countries. First, the indicators on the risk of job loss or job insecurity show that bad jobs (underemployment and informal employment) are dominant in many countries with and without digitalization, but mainly without it in Latin American countries. Second, the risk of job losses in more routine tasks (leading to unemployment and, in part, to underemployment) is high in all Latin American countries and in Spain and Italy, probably because of their productive structure and their subordinate position in globalization, which increases the risk of routinization. Poor employment and unemployment lead

to low wage costs, hence a lower risk of effective robotization, especially in manufacturing, and particularly in the automotive sector, which accounts for a small share of jobs in most countries. Employment in the information and communication technologies sector is often a strong indicator of improved employment for countries where the digital economy is advancing. Bad jobs and unemployment will remain real threats, even if they are curbed by robotization.

In the field of education and training, the importance of having the highest level of education to deal with advances in digital technologies must be stressed. There is a growing time lag between labour supply and demand: people's times and the times of change in jobs. The differences between countries are considerable, not only between the two groups analysed but also within each group. Lifelong learning will undoubtedly become more and more important in the coming years because of the transformation of employment. The relationship between education and work that this time lag entails requires a new concept of schooling and training and, consequently, a change in the functions and organization of the institutions that offer them. The main changes are (a) conceiving education as a lifelong process and (b) focusing initial education (learning during childhood and youth) on laying the foundations and irreversibly providing the tools to make lifelong education viable for all. Schooling and training must be conceived as a process that will continue throughout life. This will be a complex process involving non-linear school and training experiences that will flexibly combine schooling, training and work experience. The conclusions highlight that the digital economy is being shaped in today's society, occupying an increasingly hegemonic space in the activities and organization of companies, jobs and daily lives. It will not advance at the same pace in all countries and will not embrace the whole of society. Comparisons between countries therefore make sense, as there are differences between men and women, between companies of different sizes, between education systems and others. Digital technologies develop in a particular social context, so interests, strategies, the associative fabric and the cultural, social and political traditions will play a role in their evolution. All these possible determinants of the advancement of digital technologies and their consequences for the everyday lives citizens are grouped into the notion of policies (standards, public funding, government actions and strategies of social actors) and the role of formal and informal education.

Related to everyday life, the increase in the use of the internet, smartphones and social networks (or rather, digital networks as this chapter calls them) is leading to important changes in communications, social relations, leisure, shopping habits, etc., which have shown a dramatic leap in all countries since 2005. The data show that the consumption or adoption of these digital technologies was consolidated at the beginning of this decade through a disruptive dynamics of convergence of these three technologies, which began to be used by individuals and households on a large scale and spread rapidly in all the countries analysed. This profound social change brought about by digital technological transformations all over the world, and particularly in the ten countries, has led to a socio-technological change arising from the massive individual use (consumption) of the three technologies: the internet, smartphones and social networks.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed
Technological innovation and the digital economy.
Inequalities observed
The digital gap in daily lives
The labour market gap and robotization
Educational systems not adapted to new needs
Differences in access to services and consumption
The impact of the fourth revolution in general
The gender gap in technology
Most important policies for addressing these inequalities
Improvement of employment conditions in the digital economy.
Modernization of the productive structure to face technological change.
Investment in R&D.
A shift of the energy model towards renewable energy (to face the major challenge, the climate crisis).
New regulations (in employment, in taxation and to support those who cannot find employment).
New training tools.
A new type of lifelong education.
Regional balance in digitalization.
Guaranteed privacy and protection of citizens' data.
Important bodies for carrying them out
Governments in collaboration with different sectors of the economy.

Source: F. Miguélez, J. Planas and P. Benítez (Chap. 5)

15.1.3 Social Stratification and Mobility

15.1.3.1 Measuring Social Stratification

A comparison of social stratification in three Latin American countries (Argentina, Chile and Uruguay) and four European countries (Finland, France, Spain, Great Britain) is used to explore external and internal borders of social classes and the challenges posed by their analysis for sociology. Following the thesis of Treiman, who states that employment follows the same order in all societies, the analysis sought to determine how similar the social classes in Europe and Latin America are.

The classification of Erikson, Goldthorpe and Portacarrero provides a good picture of the class structure in different countries. The first conclusion to be drawn is that despite different historical trajectories, welfare regimes and development levels, the structure of social classes is very similar. However, differences can also be seen. In advanced economies a large proportion of the population are in the service class. Since the living conditions of this class are much better than those of the other social classes, a large section of the population of these societies has high standards

of living. Likewise, there is a larger agricultural population in Latin American countries, and two countries that underwent late industrialization, Finland and Spain, still have a large agricultural sector. Segregation according to gender is also widespread.

The second conclusion refers to the education level attained by the different social classes. Educational growth has been more intense in Europe and has reached a higher number of social classes. It has also been attained particularly by women in Latin America. The third conclusion is that there are some divergent points in the employment conditions of the social classes between Europe and Latin America. The working conditions of Latin American countries are worse than those of their European counterparts, including those in Southern Europe. On a scale from more industrialized to less industrialized economies, fewer social classes reach adequate work conditions and decent life opportunities.

Finally, different numbers of classes also indicate different levels of inequality. Europe's citizens form part of three large groups, while Latin America has greater stratification between its classes. In general, the role of the State does not appear to modify the social class structure in the societies analysed, which are characterized by a market economy and nuclear families. However, according to the level of development, a larger proportion of the population seems to have better social opportunities.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed
This chapter compares social stratification in three Latin American countries (Argentina, Chile and Uruguay) and four European countries (Finland, France, Great Britain and Spain).
Inequalities observed
Greater differences between social classes in terms of education, income and other goods and services.
Most important policies for addressing these inequalities
Educational expansion in order to increase skills for work
Lifelong learning inside and outside the workplace
Compensatory policies for women
Work-life balance policies
Compensatory policies for low-class workers
Important bodies for carrying them out
The ministries responsible for employment

Source: E. Barozet, M. Boado, I. Marqués-Perales (Chap. 6)

15.1.3.2 Comparative Social Mobility

The relationship between social origin and class destination in the ten countries of the INCASI network was analysed in order to find a relationship between the level of development and social mobility.

The conclusions regarding absolute mobility are that structural change has been very great in both Latin American and European countries. There is greater similarity in the class movement in Europe, whereas the changes are more abrupt in Latin America. There are two different stages of industrialization according to Ishida and Miwa, which can be summed up as high rates of deruralization in late-industrialized countries and a more marked process of deindustrialization in European countries. The growth of the service class shows the accentuation of the post-industrial stage in Europe; this phenomenon is also observed in all Latin American countries but to a lesser extent and with greater differences between countries. Considering absolute social mobility in a more compact way, by collapsing the seven classes of the social class scheme of Erikson, Goldthorpe and Portocarrero to four macro-classes, reveals the importance of immobility because it indicates the strength or inertia of social reproduction. Women are the most upwardly mobile (43.6%), whereas close to 17% of the general population suffered downward mobility.

The results for relative mobility confirm that European countries are more fluid than Latin American countries. When differences between classes within each country are studied without taking them comparatively, a common hierarchical order is observed that shows the agricultural classes at one end and the service classes at the other end, indicating the polarization between classes, and various intermediate situations according to the particularities of each country. Men in Brazil and Chile and women in Mexico and Chile show the greatest relative inequalities. On the other hand, men in Italy, Spain and Great Britain and women in France, Great Britain and Finland show the lowest inequalities.

When all countries were placed in relation to each other, a comparative relative inequality measure between classes and between countries was obtained. The results show that relative mobility between classes is much less frequent in Latin American than in European countries. In particular, in Brazil, Chile and Argentina the mobility barriers are very high for men and even higher for women compared with the other countries.

A separate analysis of class inheritance corroborated a pattern of uniform behaviour in all countries, revealing the class of small farm owners to be the most reproductive in all countries. The class that contributed least to reproduction was the lowest one, that of agricultural labourers.

Finally, the analysis provides evidences, that “the later and faster the industrial development, the higher the social inequality and the lower the social fluidity”, in line with the hypothesis of Ishida and Miwa. The most important result was that the measure of social inequality is purely sociological, based on socio-occupational indicators.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Intergenerational social mobility.

Inequalities observed

In capitalist societies with late- or early-industrialized systems, there is still an excessive class reproduction or a high influence of class of origin on the occupational position of people, a situation typical of state societies. This finding is dissonant with what modernization theory expects: that meritocracy and the market as a resource allocator should correct inequalities.

Most important policies for addressing these inequalities

Many authors have worked on these issues. Here we will return to policy recommendations that have been proposed by experts.

(1) Institutional/political:

Strong democratic institutional societal designs.

Fair social security systems.

(2) Economic context:

Economic stability.

Strongly redistributive tax systems.

Balance/neutralization of the importance of inheritance based on concrete measures of initial social disadvantage (guaranteed minimum income).

Equalization of the population's living standards (reduction of inequality).

Economic support for less favoured groups.

(3) Education:

Strong educational expansion through the increase in educational levels of the population (eliminating direct costs and indirect costs).

Reduction/elimination of dropping out from the school system.

Free and universal access to university.

(4) Labour market

Promotion of meritocracy in access to and promotion in jobs.

Compensatory measures for women to reduce the gender gap.

Promotion of formal labour systems.

Implementation of a universal reduction in working hours in all sectors.

Important bodies for carrying them out

Ministries of economy, education, employment and social security. All political bodies responsible for strengthening the democratic institutional design of each country.

Source: S. Fachelli, I. Marqués-Perales, M. Boado and P. Solís (Chap. 7)

15.1.3.3 Migration, Social Mobility and Transnational Space

The relationship between migration and social mobility in two countries, Argentina and Spain, was analysed from two perspectives: through a transnational study of the patterns of intergenerational social mobility of immigrants and natives in these two countries; and through a study of the social mobility strategies and trajectories of Galician families in Buenos Aires and Argentinians of Galician origin who migrated to Galicia after the 2001 crisis.

The transition towards market-based capitalist agriculture and developments in sea transport led large numbers of displaced agricultural workers in Europe to move to the United States, Canada and Latin America. Latin American countries—and Argentina in particular—held an irresistible appeal for overseas immigrants in the wake of waning migratory flows from northern Europe and a rise in the number of

migrants travelling from Southern Europe. This situation changed totally from the mid-twentieth century onwards, with a rise in interregional flows, a steady fall in the total and relative number of overseas immigrants, and extra-regional emigration to more developed countries (the USA and Europe).

In both Spain and Argentina, the integration of the immigrant population now falls within a polarized class structure in keeping with the dynamics of modern-day capitalism. Essentially, immigrants provide the workforce that satisfies the demand for unskilled manual labour. This trend is slightly more evident in Spain, where the class structure is more consolidated. As entry is made into the lower echelons of society, the immigrants generate a kind of “upward push” for the native population of both countries. In addition to this general common trend, immigrants in Argentina display a higher rate of upward social mobility than their counterparts in Spain, which can be attributed to the fact that they originate from lower classes. Furthermore, immigrants in Spain enter a more consolidated class structure and may be faced with greater levels of discrimination. However, though they occupy lower rungs on the social ladder, they obtain higher incomes than in their places of origin.

Historically, Spanish emigration to Argentina has provided opportunities for upward social mobility, attributable to a series of factors that include a less consolidated social structure, migratory policies that favoured the arrival of overseas immigrants and a Euro-centric imaginary and habitus oriented more towards material accumulation. In contrast, the Latin American immigrant population in Spain and regional immigration in Argentina are today a source of manual/unskilled labour within a context of more consolidated social structures, a segmented labour market and migratory policies that are traditionally more restrictive towards subordinate ethnic groups.

A reflection on the link between social and spatial mobility is presented. Migration has a positive effect on the social mobility of the native population, but it also has the capacity to reproduce social inequality for the migrant population within a context of more closed social structures and restrictive migratory policies. This situation blocks migrants’ dreams of social ascent due to the ethnic segmentation of the labour market. Nevertheless, a study of the relationship between migration and social mobility from a transnational perspective that looks beyond the host country reveals the social mobility strategies that activate different forms of capital, passed down from generation to generation (economic/asset-based, social, ethnic and citizenship-based) within the transnational space, that enable migrants and their descendants to tackle the social blocking and “immobility”. They transport a baggage filled with capital in varying forms that travels from one side of the Atlantic to the other, allowing them to achieve dreams of social mobility.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Migration between Latin America and Europe: the case of Argentina and Spain

Inequalities observed

The immigrant population in both Spain and Argentina currently covers the demand for unskilled manual work in a segmented labour market.

The upward social mobility of European immigrants and their descendants was favoured by a migratory policy that considered overseas immigrants as a cornerstone for the construction of a nation and a Euro-centric imaginary that conferred greater status on European ascendancy. Until the entry into force of Law 25871 in Argentina, regional migrants traditionally experienced a less favourable context that failed to take them into consideration. They were overlooked during the construction of a national identity rooted in the melting pot of races through the miscegenation of various overseas migratory groups. Native and mestizo groups from both Argentina and other countries in the region were not taken into consideration.

Many of the Latin Americans who migrated to Spain from the 1990s onwards had an average to high level of education experienced a process of declassing, faced with a labour market that restricted their opportunities to less-skilled manual employment in the secondary labour market, a process that was furthered by European and Spanish migratory policies.

Most important policies for addressing these inequalities

Introduction of regular migration channels (opportunity to obtain work and residence permits on entry into the country) in keeping with the workforce demands of the labour market.

Combating immigrant trafficking and illegal immigration.

Introduction of measures that facilitate the inclusion of immigrants in the formal economy.

Bilateral and international agreements for the legal protection of the immigrant population.

Employment protection measures for the immigrant population, guaranteeing equal opportunities with the autochthonous population.

Development of integration policies targeting the immigrant population and their descendants.

Protection of immigrants' fundamental human rights, regardless of their legal status (the right to healthcare, education, association, etc.).

Important bodies for carrying them out

European Union, Mercosur, States, regional/autonomous governments, local governments

Source: L. Oso and P. Dalle (Chap. 8)

15.1.3.4 Economic Inequality

This chapter compares structural differences and changes in income distribution during the twenty-first century in a selection of countries in Latin America and Europe, as well as within and between the two regions. It considers how unequal the trends towards equality or inequality in income distribution are between Latin America and Europe and explores some factors that could determine this distribution of income within each country and in both regions.

The results show that while GDP per capita has increased in both the individual regions and in the aggregate, the differences between Europe and Latin America persist: the mean for Latin America remains about one third of the mean for Europe. Likewise, the coefficient of variation has decreased in Europe but has increased in Latin America, illustrating an increase in inequality between Latin American countries in terms of mean income per capita. The coefficient of variation shows a significant reduction in poverty over time both by region and in the aggregate of countries. Europe has clearly lower poverty rates, although with greater intra-regional variation. In Latin America, on the other hand, the trend seems to have been

markedly positive, with less internal variation but with an increase in inequality between countries. Finally, the Human Development Index (HDI) shows an improvement, with a reduction in inequality between countries in each region, between regions and in the aggregate. However, Latin America still has far lower levels than Europe, and the gaps between countries have narrowed less than in Europe.

Income distribution within each country is the product of the complex interaction of innumerable economic, demographic, social and institutional factors. Inequality in income distribution among the population globally or within a region reflects the combined effect of inequality within countries and inequality between countries. Seen in this way, the simplified description of the behaviour of global inequality over the past hundred years shows a period of declining inequality within countries, but with an increase in the gap between countries. More recently, the trend has been different, at least for the countries of Latin America and Europe: inequality in income distribution tends to increase in some societies and to decrease in others, narrowing the gap between countries in each region and between regions.

Taking into account the three variables (the Gini index, productivity and social spending), the results show that, in general, Latin American countries are located in the “lower development with greater distributive inequity” group and European countries are located in the “greater development with lower distributive inequity” group.

Finally, the study provides evidence in favour of a reduction in economic inequality between regions but also shows the existence of structural factors that could explain intra-regional distributional inequalities that are still great.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Inequalities within countries and between countries and regions.

Inequalities observed

Inequality has tended to increase within countries recently, but the gap between countries has narrowed (Atkinson 2015).

During the last two decades of the twenty-first century, Western Europe and Latin America narrowed their economic inequality gaps because they followed different paths: while inequality narrowed in most Latin American countries, the opposite occurred in most of Europe.

In Europe, we see a double effect of inequality. While the process of European economic integration consistently reduced inequalities between nations into the first decade of the twenty-first century, convergence was partially interrupted by the effects of the 2008 economic and financial crisis and by austerity policies.

In GDP per capita, while both the individual regions and the aggregate have improved, the differences between Europe and Latin America persist: the average for Latin America remains about one third that for Europe.

The HDI shows an improvement, with a reduction in inequalities between countries in each region, between regions and in total. However, Latin America still has far lower levels than Europe, and the gaps between countries have narrowed less than in Europe.

(continued)

Most important policies for addressing these inequalities

To improve secondary distribution in order to achieve real improvements in terms of material well-being and to assess how to implement social policies according to the proportion of social spending in each country.

To broaden the level of coverage of social policies associated with secondary distribution of national income and income redistribution.

To evaluate the implementation of, for example, *minimum guaranteed employment programmes*, in which the government should adopt an explicit goal to prevent and reduce unemployment, offering jobs that guarantee a minimum wage to those who seek them, mainly by targeting these jobs to the informal and social economy sectors.

Important bodies for carrying them out

A *minimum guaranteed employment* programme would require the coordination of several bodies:

In Argentina, for example, the Ministry of Social Development, the National Council for the Coordination of Social Policies, the Ministry of Labour and the National Social Security Administration.

In Spain, for example, the Ministry of Labour, Migration and Social Security and the State Secretariat for Social Security.

Source: A. Slavia (Chap. 9)

15.1.4 Life Trajectories and Gender Inequality

15.1.4.1 The Life Course Perspective for the Analysis of Social Inequalities

To analyse social inequalities in our model, the importance of dynamic and temporal aspects was established in terms of either trajectories or mobility, also taking into account biographical aspects. The diachronic dimension of inequalities must be considered, because it identifies the way in which inequalities increase or decrease over time, and how they are reproduced and transmitted between generations. With this objective, a theoretical-methodological proposal was developed that seeks to make compatible and articulate macrostructural conditions (the macrosocial scale), institutional relations and policies (the mesosocial scale) and the actions of individuals (the microsocial scale) in the study of social inequalities. The particular combination of multiple scales and dimensions over time and in specific contexts (historical, cultural, etc.) leads to a permanent production and reproduction of social inequality. The biographical perspective proposed by Bertaux, or the life course perspective proposed by Elder and other authors, are therefore intrinsically diachronic and offer methodological advantages that make this approach possible.

In particular, taking into account the holistic case studies proposed by Yin, a biographical comparative approach is developed. This approach can be intraconfigurative and interconfigurative. The intraconfigurative biographical approach involves taking a biographical case, i.e. a unique case, and analysing the articulation/tension of the macro- and mesosocial scales over time, i.e. the way in which factors external to the subject affect the life trajectory and the role played by

subjective experiences and decisions in its development. The biographical account of the social actor is recovered as a source of fundamental information. The choices and actions deployed and the consequences of certain structural constraints are observed in the biographical narrative, and the researcher incorporates an analytical approach into the particularities of the macro- and mesosocial scales in the configuration of the biography studied. The interconfigurative biographical analysis involves a comparative case study in which two or more biographies are contrasted. The analysis considers, first, the way in which macro- and mesosocial scales affect the development of the life trajectories in each case; second, the relevance that the experiences and choices of the subjects have in their life path; and third, the particular external constraints and actions in the different stages of the trajectories.

As has been demonstrated from the analysis of the cases, the comparative biographical perspective and its intra- and interconfigurative analyses allow us to contrastively establish the particularities of external constraints and subjective actions in the different stages of the compared life trajectories. This perspective highlights the importance of the voice of social actors for understanding how different trajectories are constructed in the face of similar or different macro- and mesosocial contexts that are the result of a chain of advantages or disadvantages that configure and reconfigure social inequalities over time.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed
Social inequalities from the comparative biographical perspective, analysing work trajectories
Inequalities observed
Employment inequality. Public social institutions (unemployment insurance) play an important role in reducing social inequality. Training for work is important in the development of unequal career paths.
Most important policies for addressing these inequalities
<ul style="list-style-type: none"> – To promote active state policies through social institutions in societies. – To promote the development of better unemployment insurance in Latin America. – To promote training for work in public and private workplaces with the idea that workers should have knowledge to place on the labour market in times of unemployment or low employment demand.
Important bodies for carrying them out
The administrative bodies in each country responsible for social protection, labour and macroeconomic policies.

Source: L. Muñoz-Terra and J.M. Verd (Chap. 10)

15.1.4.2 Social Times, Reproduction and Social Inequality at Work

The analysis of social times and inequality, focusing on changes in the use of time and social inequality in unpaid work between men and women, reveals the need to design and implement public policies that relate working time to the principle of

equality. Although models of traditional male-provider families in which women play a dual role remain dominant in some countries, some changes are observed in the hours spent on paid and unpaid work in dual-income heterosexual couples, reflecting patterns of transformation of women's participation in the public sphere. It is concluded that reducing gender gaps in non-reproductive working time will involve addressing domestic co-responsibility, agreed organization of working time and accessibility to social and care services for children and older adults. Discussions on productive and reproductive work take on new significance when demographic, social, economic and political changes in contemporary societies are analysed. The position of women in the productive sphere and their economic participation in the labour market are related to how reproductive work issues are resolved individually and socially and how they are linked to the commodification of care work.

The time use methodology, and in particular time use surveys, were embedded in the debates that, from a critical feminist position, influenced the conceptualization of time as invariable, homogeneous, independent of the context and set against a commodified money time that is dominant, recognized and valued. In addition, this time reflects power structures and capitalist and patriarchal relations. Although a reduction in gender differences in time use has been detected over the past 50 years, women have a higher overall unpaid workload and total time worked than men in all countries, highlighting the significant feminization of unpaid work and the persistence of gender segregation in relation to domestic work. The differences between countries in the hierarchy and the magnitude of the most relevant factors for explaining the gap between men and women are noteworthy and the Latin American countries show greater differences in the gender gap than the European ones. The analysis of the gender gap in domestic and care work shows the low incidence of the variables related to "relative resources": women's education levels, socio-professional categories and economic resources in the capacity for negotiation and in the distribution of time dedicated to this work. But their participation in paid work and their economic income are relevant factors for reducing the inequality gap, thus verifying the association between the socio-economic stratification of women and gender relations. By contrast, men's relative resources, education level and socio-professional category are more consistent and of a higher level, especially in Latin American countries. Therefore, the inequalities in the social relations of production intersect with the maintenance of relations of gender inequality. Consequently, women from lower classes and more disadvantaged households suffer greater inequality in unpaid work in households.

Taking into account gender ideologies, roles and attitudes underlying the sexual division of work and the gender gap in carrying out of domestic and care work, androcentric cultural and social norms and values persist to a greater extent in Latin American countries. In all countries, women dedicate more time to domestic and care work in accordance with the care and welfare needs of the people in the household. The gender gap is sensitive to this and shows that female time is the adjustment variable, with consequences on the quality of life and welfare of women, and male time is the key factor to achieving equity in work times.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed
Gender inequalities in time use: unpaid work and the overall workload.
Inequalities observed
<ul style="list-style-type: none"> – Employment and economic inequality and inequality in care work are two processes that feed each other. – The position of women in the productive sphere and their economic participation in the labour market are related to how care and reproductive work issues are resolved individually and socially. – Internal inequality among women: the situation is more burdensome if there are fewer resources for employment, greater demands for domestic care and less possibility of transferring the household's care needs. – Male socio-economic stratification affects the distribution of unpaid work.
Most important policies for addressing these inequalities
<ul style="list-style-type: none"> – Work-life balance measures: parental leave, elderly care, etc. Gender-sensitive publicly funded leave policies (for childbirth, illness or care of dependent persons) for all men and women. – Active labour market policies: incorporating unpaid carers into the labour market. – Promotion of equal working conditions for women, in particular equal pay and equal access to retirement and pensions. – Promotion of men's participation in care work within households. <i>Recognizing, reducing and redistributing</i> unpaid care work. – Rewarding: more work and decent work for care workers. – Planning of working times more in line with social times (reduction of working hours, adaptation of working time to school time). – Investment in quality care services, policies and facilities. – Ensuring full and effective participation of women and equal opportunities for leadership at all levels of decision-making in political, economic and public life. – Education in equal social values. – Regulation of domestic workers, maternity protection and wage equality.
Important bodies for carrying them out
Social protection policies, labour policies, care policies and macroeconomic policies to be carried out by the relevant political and administrative bodies.

Source: M. Domínguez-Amorós, L. Muñoz-Terra and G. Rubilar (Chap. 11)

15.1.4.3 Gender and Care Models

This chapter presents and characterises the way in which, in the twenty-first century, after years of feminist struggles inside and outside of institutions, gender relations are organised in the different countries: on the European side, Spain, Italy, Finland, France and the United Kingdom; and on the Latin American side, Argentina, Brazil, Chile and Uruguay.

Gender relations can be understood as a relevant category of analysis for understanding social protection systems and their evolution in the neoliberal era. Despite the shared legacy of the male breadwinner/female carer model and the widespread

emergence of the adult worker (or dual earner) model, all countries are organized on the basis of different principles and different national gender equality architectures that can be identified as “gender regimes”. Gender “contracts” or “regimes” emanate from the degree of defamilization and the social organization of care, i.e. the state policies adopted (or not) to free women from domestic and family responsibilities, which remain a female prerogative.

From the institutionalization of state feminism in the 1990s in Europe and Latin America, the defence of women’s interests—understood as a social category—obtained the status of an important political issue in certain public and especially international institutions, formalizing the perspective of *gender mainstreaming*. However, state feminism did not generate the adherence of the entire feminist movement. Nor did it lead to the same dynamics or have exactly the same consequences on the two continents studied. And its degree of implementation in different countries says something about the state of gender relations, in particular in relation to the analysis of state regulation of care.

The positioning of different countries regarding the type of “gender contract”, mostly established according to the level of deinstitutionalization of the male breadwinner model, is an important indicator of advances in gender equality. It is a starting point for deciphering the state of gender relations in countries where gender issues are presented differently. It allows a comparison of the importance given to the transformation (or not) of the sexual division of labour by the feminist movement or by the institutions in the countries of the two continents. But, above all, the integration of Latin American contributions into European analyses allows the analytical framework to be renewed and adapted to a new social reality. This is especially the case with regard to the introduction of the issue of social equity in a context of multiple crises of capitalism.

However, improvements in gender gaps and, in particular, increased participation of women in the employment market and the decline in the male breadwinner model now face the risk of “redomestication” of women as a result of the emergence of populist right-wing, exclusive and totalitarian systems, or neoliberal projects that fail to carry out policies that maintain the improvements achieved. The labour market has also deteriorated considerably, bringing the new European gaps closer to the structural ones in Latin America, segmenting the situation of women between a group of privileged people who have more and more opportunities to enjoy the advances of the salary society or economic power and a disadvantaged group in their working and employment conditions that cannot enjoy the long-awaited social protection of salaried societies. Structural changes in terms of gender seem to be affected, threatening the rights and living conditions acquired so far by women, especially the less privileged.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Gender inequalities.

Inequalities observed

Unequal distribution of paid and unpaid work between men and women, especially uneven division of caring duties and household works.

Most important policies for addressing these inequalities

Gender equality policies, including the following:

- (1) Leave (policies with strong incentives for men to take parental leave in the form of “use it or lose it” and non-transferable entitlements): fully paid and non-transferable parental leave for every parent; statutory paternity leave.
- (2) Childcare services: public early childhood education and public care and pre-school education; children’s unconditional and universal right to childcare
- (3) Available, accessible and affordable care services and infrastructures for elderly people.

Important bodies for carrying them out

Gender equality machineries, such as a full ministry dedicated to this question.

Source: J. Jarty and K. Batthyány (Chap. 12)

15.1.5 Social Policies

15.1.5.1 Unemployment Benefit Schemes

In relation to social policies, an initial analysis gave a comparative perspective of the unemployment protection systems in Argentina, Uruguay, Spain and Italy. Despite the similarities because all are compulsory, contributory and proportional, they operate differently depending on the contexts of employment (more or less informal), the rate and coverage of unemployment, and the amount of precarious employment in each country.

The theories of the active social state and the investor state and reforms of unemployment protection systems have led to the adoption of modernizing language in these countries: activation, employability, conditionality, life-cycle training and flexibility are some of the words used in Europe and also in Latin America, but with different meanings according to the institutional reality of each country. In the Latin American countries, the welfare state is very weak, whereas in Europe it is a diverse institution. Nevertheless, a common trait of the four countries is a trend towards increased welfare policies, in line with the increased risk of poverty.

The conclusion is that the four countries show some similarities in their trends: (1) welfare policies have increased; (2) the third sector has grown to address inequalities and the risk of poverty in the face of the withdrawal of the state; (3) in all four countries the high volume of public debt restricts the possibilities of political manoeuvre; (4) because the states are indebted, the responsibility for job creation lies with the market rather than public intervention; (5) a discourse aimed at coordinating passive and active policies has been introduced, even with a certain degree of conditionality for the unemployed to be able to receive benefits, although

this discourse is still purely formal, far from reality; and (6) there is an emphasis on pre-distributive policies, focusing on activation in the labour market and emphasizing the idea that the first distributive social policy should be employment.

The difference between continents is that in Latin America informal employment reduces the coverage of unemployment benefit and also the powers of unions, whereas in Europe the unemployment coverage rate is high. In short, in Europe the administration and the fiscal system have a considerable capacity to monitor and sanction. In addition, strong trade unions have contributed towards the pressure to sustain the welfare state.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed

Unemployment benefit schemes in Spain, Italy, Argentina and Uruguay: similarities and differences in intervention and social contexts.

Inequalities observed

A low coverage rate of unemployment, informal employment and inefficient non-contributory benefit.

Weak collective bargaining and unemployment protection.

Most important policies for addressing these inequalities

– A higher coverage rate, regularization of informal employment and an improved non-contributory benefit policy.

The employment crisis forced many governments to introduce non-contributory systems. Many unemployed people exhausted their contributory unemployment benefits, which became a pressure factor to introduce new benefit systems or non-contributory benefits. This was the case in Spain during that period, with the approval of the Prodi and Prepara benefit programmes in 2011, in addition to other benefits reformed during the crisis. In Italy, the *Reddito di Cittadinanza* was approved in 2018. Many analysts have described this policy as “welfare-based” and aimed at avoiding the risk of severe poverty (Kazepov and Barberis 2013; De la Rica 2015).

– Collective bargaining and unemployment protection

The coordination mechanisms are the level of collective bargaining and its degree of centralization, in addition to state regulation. We conclude that a social model is defined by the way in which pre-distributive and post-distributive policies are articulated, which led us to consider collective bargaining systems as important for reducing inequalities in the Gini index. Wage coordination through collective bargaining—and its broad coverage in the number of protected workers—introduces egalitarian wage patterns, as demonstrated in Scandinavian countries, which are described as strong neo-corporatist systems.

Important bodies for carrying them out

Trade unions and companies.

Labour mediation institutions.

In Argentina: the Ministry of Social Development, the National Council for the Coordination of Social Policies, the Ministry of Labour and the National Social Security Administration.

In Uruguay: the Ministry of Labour and Social Security.

In Spain: the Ministry of Labour, Migration and Social Security and the State Secretariat for Social Security.

In Italy: the Ministry of Labour and Social Policies.

Source: A. Martín-Artiles, F. Vincenzo and E. Chávez-Molina (Chap. 13)

15.1.5.2 Compared Pension Systems

A second analysis on social policies compared the pension reforms and current tendencies in two European countries, Spain and the United Kingdom, and two Latin American countries, Chile and Argentina. The hypothesis behind the study was that it is difficult to sustain strategies that involve a risk of dualization of social security schemes, de-linked from the principles of social rights and with a marked tendency towards increasing inequality.

The existence of a series of common elements is observed in the reforms implemented in European Union countries. The first measure is a policy aimed at diversifying financing so as not to depend on contributory pensions and the demographic effects of population ageing, as well as low wages. The occupational pension system (pensions financed by companies and often associated with collective bargaining) linked to employment has been growing in Europe. Pensions are also being financed through private pension systems, capitalization pensions. In some countries, this financing is linked to the “financial participation” of workers in the profits of companies.

The re-reform of the pension system introduced in Chile during the Bachelet government in 2008 tried to return to the role of the State as a guarantor of certain principles of universal rights and the creation of the Solidarity Pension System (SPS). Although the reform persists in sustaining the Individual Capitalization System of the old Pinochet regime, a series of changes were introduced that involve not only lowering costs but also achieving better pensions for members, as well as strengthening Voluntary Pension Savings (APV). The re-reform of the Argentine pension system evolved from a mixed system with a distribution and capitalization system established in 1992 to the 2008 pension reform, which reversed the private capitalization system and returned to the state distribution system. In January 2009, the Plan or Programme for Pension Inclusion was implemented, applying the strategy of expanding pension coverage through early retirement programmes or by moratorium in order to correct and increase the number of beneficiaries.

Finally, whatever type of pension reform is implemented, it must be debated publicly and widely. The trend towards capitalization systems finds a barrier in the widespread informal work in Latin American countries. As discussed in Chap. 2, the informal sector has grown exponentially in part due to labour flexibility, which is typical of the neoliberal policies applied in the region. Similarly, gender inequalities are on the agenda in both continents, and despite the differences that can be observed between European and Latin American countries, problems of parameters such as age and gender inequality persist. But it is perhaps the change in principles guiding social security through the international agreements established by the ILO that could lead to a paradigm shift.

Four important tendencies of the reforms involving the solidary principles of the system are pointed out: (1) the crisis of organic solidarity, which generates a return to mutual support, interfamily assistance and volunteering, and the growth of the third sector; (2) the crisis of inter-regional solidarity, especially in Europe with the emergence of the 2008 crisis, which has generated a rejection of transfers between

rich and poor regions; (3) the crisis of inter-classist solidarity, expressed in the rejection of fiscal pressure and demands to reduce taxes; and (4) the crisis of inter-generational solidarity, produced by the wage devaluation of young wage earners.

The following table shows some proposals for public policies aimed at dealing with inequalities in this area:

Phenomenon analysed
Social policies and in particular pension/retirement policies in a context of crisis and paradigm shift.
Inequalities observed
Inequalities in access to 'decent' pension/retirement schemes for all societal groups
Most important policies for addressing these inequalities
To democratize the access of disadvantaged groups to (distributive and post-distributive) pension/retirement schemes.
To adopt solidarity and inclusion rather than market-driven approaches.
Important bodies for carrying them out
State pension bodies.

Source: P. Scarponetti, L. Sepúlveda and A. Martín-Artiles (Chap. 14)

15.2 Towards a Research Programme

As a result of the work carried out within the framework of the INCASI project, we will propose for the forthcoming years a multinational comparative research programme on inequality and social stratification patterns in Latin America and Europe. The justification for this programme comes from the need to expand international comparative research to consider the way in which social inequalities are expressed in different national and regional contexts and to identify similar patterns and mechanisms inherent in the configuration of social inequalities. By comparing countries, we can recognize some similar historical processes, such as global economic integration, technological change and globalization, precarization of labour markets and gender inequalities. We can also observe dissimilar social and historical conditions marked by the specific characteristics of each region and country. Further exploration of these issues will guide the general objectives of the future programme.

With the concept of social stratification, following Grusky's definition, we refer to the set of social structures and institutions that regulate access to life opportunities, as well as to social mobility mechanisms that guide access to the positions defined by those structures and institutions. We will adopt a multidimensional approach to social stratification, which allows us to broaden our view beyond studies that emphasize an isolated dimension of inequality (for example, occupational or income hierarchies) and thereby try to capture more broadly the complexity of multiple inequalities and their interaction in specific social contexts.

The development of a multinational and multi-thematic comparative research programme requires a general analytical framework broad enough to include the diversity of research themes and perspectives of the researchers participating in the project. This general analytical framework will be used to establish a set of basic principles that will guide the research work in each area, to which specific principles that are relevant in each research topic will be added. To this end, our starting point is the AMOSIT model, which served as a general analytical framework for locating the different lines of research of the INCASI network and constructing the first integrated conceptual scheme for the analysis of social inequalities. As we explained in Chap. 1, from the substantive point of view this model considers three central areas of social life in which we can study social inequalities in an interrelated way: the educational system, productive work and reproductive work. From the methodological point of view, we define three central aspects in our analysis model: the articulation of macrosocial and microsocial elements with mixed method analysis designs, the importance of the dynamic dimension of social phenomena over time and the comparative perspective between countries.

Taking into account this precedent, in the new research programme our general thesis is that to understand the similarities and differences in social stratification patterns between regions and countries, it is necessary to understand the interface between structural factors (such as the productive structure, the labour market, the gender model, the territory, demographic dynamics and technological change) and national institutional configurations (such as social models, educational systems, labour market regulation, social security systems and social policies). Regardless of the specificity of the issues that make up each of these areas, the analysis of gender and ethnic inequalities should be adopted as a cross-cutting analytical perspective. We must also study the interaction of the issues in terms of intersectionality, assuming that economic and social inequalities depend not only on the position that individuals occupy in the productive structure (their class position) but also on other factors or categories, such as gender and ethnicity, and jointly determine differentiated access to opportunities and resources. Thus, the research programme plans to perform specific analyses of the configuration of inequalities in several specific dimensions, such as educational and trajectory transitions, intra- and intergenerational social mobility, income distribution, use of time, migratory processes, agencies and strategies.

The research programme will demand the development of specific methodological strategies for each of the dimensions that arise from the specification of mixed analysis designs through the articulation of quantitative and qualitative methodological perspectives. Depending on the research questions and hypotheses in each dimension, the specific analysis design should detail the geographical scope of the study in terms of the countries included, the secondary sources of information already available that are useful for the investigation in question, the possible need to obtain primary information (and the characteristics of this information), and the data analysis techniques.

Further work on the comparative analysis between Europe and Latin America must also serve to generate more accurate diagnoses and more appropriate

recommendations for designing public policies in the various fields. The ultimate goal remains the same: to provide tools for reducing social inequalities. The social world in which we live has maintained the reproduction of social inequalities as one of its constants over time, making it a structural and universal phenomenon. It remains one of the pending subjects of humanity. The programmatic objectives of the European Union and the sustainability objectives proposed by the United Nations, in addition to other similar proclamations, constantly remind us of the importance of this task. Combating social inequalities will require more and better social scientific research, as well as large data production to support it. But more important is the political will of governments and international institutions to adopt it as a priority and provide the effective means to for carrying it out. We hope that they will do so.

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