



Contributions to a regional version of the category of welfare regime. A perspective based on the Argentine case

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Abstract: The category of welfare regime has been applied in critical contributions to the study of protection schemes in Latin American countries. This article reviews early debates in which this category was employed in the European context, and the transition to its application by Latin American researchers to study the cases of their own countries. The manner in which the perspective of welfare regimes and related conceptual tools were adapted to propose regional and local analyses of Latin America is also discussed. Starting with an analysis of how the Argentine case was understood, the approaches that characterized the regimes of the region as hybrid, incomplete, or embryonic are then analyzed and some possible vectors for a critical update are proposed. The theoretical review takes into account the considerable existing bibliography on Latin American welfare regimes.

Introduction

Amid the intense debate from the late 1970s to the early 1980s about the development and crisis of welfare states, the theoretical proposal of Gosta Esping-Andersen (1993)—which employed the typology of social policy models already sketched out by Richard Titmuss— suggested the category of welfare regime as a basis for the comparative study of welfare states and welfare provision in 18 of the Organization for Economic Co-operation and Development (OECD) member countries.

Understood as an institutional arrangement between the state, the market, and families, this category permits a different understanding of the achievements and transformations of the welfare state, and is highly efficient for comparative studies and for reviewing some the questions raised by the second great crisis of capitalism. In addition, the typology of welfare regimes¹ proposed by Esping-Andersen allowed for recognition of the variations and common characteristics among combinations of state intervention, familial arrangements, and market provisions established in the most developed countries. At the same time, it had the potential to be used as a tool for deciphering logics of articulation and for formulating and proving hypotheses about these arrangements.

As soon as it was published, Esping-Andersen's proposal led to important debates as well as revisions by the author himself, and despite some discussions that are not yet settled, it became an important contribution to theoretical and empirical analyses of welfare policies and institutional arrangements between the state, families, and the market in which they are applied. As noted by Abrahamson, the publication of Esping-Andersen's *The Three Worlds of Welfare Capitalism* (1990) marked the beginning of what the former called the academic industry of the *Welfare Modelling Business* (1999). It did not take long for Esping-Andersen's typology of three welfare regimes, and his theoretical proposal, to "travel" to latitudes beyond the borders of the advanced capitalist democracies that he himself studied.

At a juncture characterized by important changes, which included the shift from an import-substitution industrialization model to the neoliberal model of economic opening at the beginning of the 1990s, the category of welfare regime was imported by Latin American researchers as a theoretical-analytic tool to review welfare and social policy schemes in the region. Through the construction of vernacular typologies, their analyses noted the

1 At times, the same author (1993) spoke of "regimes of welfare states." In the study, the expression "welfare regimes" is used in the same sense as in Esping-Andersen's proposal.

range of social policies and welfare arrangements in the region that resulted from a combination of authoritarian political regimes (military dictatorships), unstable democracies, and import substitution industrialization.

Argentina was one case analyzed within this theoretical framework. Some local authors classified the Argentine case as a “hybrid” or an “incomplete” welfare regime, or as one characterized by “embryonic development.” In addition, when constructing typologies, some Latin American authors saw the Argentine welfare model as defined by its early, wide-ranging, and segmented expansion in the era before neoliberal reforms were implemented (Filgueira, 1999), and as having a strong productionist bias thereafter (Martínez Franzoni, 2007).

Starting from these studies and characterizations of the Argentine case, in this paper we provide some reflections on the field of study of welfare regimes in Argentina. We hope that these will also contribute to the discussion about the heuristic potential of this category and its application in Latin America. The study is divided into four parts and a closing section. First, we review the original work of Esping-Andersen on comparative welfare regimes, underlining his theoretical-analytical contributions, the theoretical status of his work, and the current relevance of the category of welfare regime, and reflect on the heuristic potential of welfare regime typologies. Second, we problematize the regional and local application of this valuable proposal, introducing Latin American studies such as those of Fernando Filgueira (1999) and Juliana Martínez Franzoni (2007) as well as more recent works about welfare regimes after the establishment of neoliberal hegemony. In the third section, we review how the welfare regime category was introduced into studies of the Argentine case and the analytic results. We discuss the designation of a hybrid or incomplete regime that led to these interpretations, noting the historicity of these perspectives. In this sense, we reflect on the existence of some “First Worldist” or “Eurocentric” biases that often color the understanding of national (or Latin American) realities, with a view to providing theoretical–methodological caveats and recognizing the problems and challenges in approaching an autochthonous national regime. In addition, we review the place allotted to Argentina in the most-recognized Latin American typologies as key to overcoming these biases. In the fourth section we analyze theoretical recommendations and, using the Argentine case, point to some directions that future research on welfare regimes might take. Among these, we suggest that the importance of the organizational structure of the federal political system be taken into consideration, in addition to the classification of subnational levels of welfare production. We think that two questions are of central importance and

of potential use in exploring this issue. On the one hand, we ask to what extent subnational heterogeneities are reflected in the currently existing definitions of the Argentine welfare regime—stratified or productivist and family-based state universalism according to the valuable contributions of Fernando Filgueira (1999) and Juliana Martínez Franzoni (2008)—and to what extent cataloguing them is empirically productive.

On the one hand, we ask whether the heuristic utility of the category of welfare regime would increase if we leave aside the perspective of methodological nationalism and propose more sensitive “lenses” through which to view subnational diversities. In this sense, we maintain that the consideration of regional diversity within the country can lead to improved analytical tools and results that are pertinent to the studies of state–market, family, and community arrangements in Argentina. In the closing considerations, we propose further research and theoretical approaches along these lines.

This article is based on an exhaustive bibliographic review and is part of ongoing research under the “Welfare Regimes in Argentina. Heterogenous Subnational Cartographies” project (“Regímenes del bienestar en Argentina. Cartografías subnacionales heterogéneas”) (Untref, Argentina), which enquires into the heterogeneity of institutional arrangements among the state, market, community, and family spheres involved in the provision of welfare on the subnational level in Argentina.

The category of welfare regime. Foundational and fertile questions

At the end of the 1980s and the beginning of the 1990s, in the framework of prolific discussions in the social sciences about the “crisis” of welfare states and announced rollbacks, Esping-Andersen’s theoretical proposal stood out. He took the typology of models of social policies sketched out by Titmuss and proposed the category of welfare regime as the basis for comparative study of welfare states and the provision of welfare in 18 OECD countries. His proposal provided the basis for a series of discussions and studies that helped to revise historical antecedents and to analyze possible derivations of the transformations of the welfare state.

In fact, after approximately 25 years of “considerable success” evidenced by unprecedented economic growth, the capitalist crisis led to the mobilization of political and scientific arguments that questioned the premises of the Beveridge Report and Keynesian theory. In the political sphere, the welfare state, defended by social-democratic governments as the achievement of the working class and an instrument of social change, become an object of criticism by both the most radical right and as well as the Marxist left (Picó, 1990 [1987]). As a result, there was a change from a positive view of

the welfare state to doubts about its continuity as a political project.

Amid this same climate of ideas, there was a restructuring of the paradigms that had dominated the social sciences for virtually the whole 20th century. This was reflected in the crisis of positivism, Marxism, and structuralism, and the ascendance of rational choice and interpretative theories (Alexander, 1988). The weakening of certain versions of Marxism and the questioning of “grand narratives,” which had more power to generalize than to explain, contributed to the revision of analytic categories and approaches (Plotkin & Zimmermann, 2012). In the field of sociology, purely macro-sociological approaches were questioned, since they were “almost always tinted with some type of functionalist reasoning”² (Barrault & Valcarce, 2015, p. 9). Studies that focused on the origins and expansion of welfare states as well as those that focused on their crises were also affected by these discussions.

In these intersections of theoretical approaches and varied paradigms, the voices of those working from a “socio-centric perspective” based on a structural functionalist matrix combined with those who valued the importance of demographic changes and industrial transformation—in this “logic of industrialization” the work of Harold Wilensky stands out—and confronted hypotheses produced by other approaches, which, from a “power resource approach,” emphasized the distribution of power among civil society and the government in explanations of state policies. Walter Korpi, employing a “class warfare theory” approach, recognizes the greater power of negotiation of the working class vis-à-vis capital, suggesting what we now consider his principal innovation: the displacement, from the center of the discussion, of purely economic factors by the political actors in dispute (Rodríguez, 2010). In the meantime, neo-Marxist authors such as Claus Offe and Jürgen Habermas in Germany or James O’Conner in the US have approached the crisis of the welfare state from a systemic perspective in order to demonstrate its structural tensions and its relationship with the capitalist crisis. Meanwhile, among the positions that are critical of these socio-centric approaches—the new historical neo-institutional approach and historical sociology—the seminal work was *Bringing the State Back In* by Peter Evans, Dietrich Rueschemeyer, and Theda Skocpol (1985), which argues for the “return of the state” in order to carefully analyze institutional traditions and path dependency as well as the autonomy of state bureaucracies.³

2 All translations of quotations from Spanish sources are by *Apuntes*.

3 Diverse and valuable classifications of the studies that appeared during this period can be found in Skocpol and Amenta (1986); Fleury (1997); Picó (1987); and Merrien (1990), among other works on the expansion of the welfare state.

The category of welfare regime proposed by Esping-Andersen make it possible to go beyond the debates of that era.⁴ In his words,

...contemporary advanced nations cluster not only in terms of how their traditional social-welfare policies are constructed, but also in terms of how these influence employment and general social structure. To talk of 'a regime' is to denote the fact that in the relation between state and economy a complex of legal and organizational features are systematically interwoven. (Esping-Andersen, 1990, p. 2)

Esping-Andersen's contribution not only consists of the notion of "regime" as a way of recognizing a systematic framework that had various dimensions, but in displacing the idea that responsibility lay only with the state. He notes that "we must also take into account how state activities are interlocked with the market's and the family's role in social provision" (p. 21).

In response to some quantitative studies, the point was not to analyze expenditure as the only expression of state commitment to welfare. The objective was to value the role of the working class and its power to demand and negotiate and, amid instances of path dependency, it was also necessary to revise how the current situation was viewed. In the words of Esping-Andersen (1990): "the question of political coalition formation is decisive. Past reforms have contributed decisively to the institutionalization of class preferences and political behavior" (p. 31).

In addition to these factors, a solid argument for this proposal is the idea that the welfare state is not only a mechanism for intervening in the structure of inequality, and possibly correcting it, but also a system of stratification in and of itself; it is an active force in ordering social relations (Esping-Andersen, 1993, p. 44).

Having made these distinctions, the author was able to stand "on the shoulders of giants" both theoretically and empirically. On the one hand, his typology of "liberal," "conservative," and "social democratic" types of welfare regimes is based on the antecedents of Marshall and Titmuss and, on the other hand, his work is based empirically on the comparative stud-

4 According to the author's website, his first articles on the subject appeared in the mid-1980s. For example, "From Poor Relief to Institutional Welfare States" (with Walter Korpi), in R. Eriksson et al. (eds.), *Welfare States and Welfare Research*, New York, 1987; "The Comparison of Policy Regimes," in Esping-Andersen, L. Rainwater & M. Rein (eds.), *Stagnation and Renewal: The Rise and Fall of Social Policy Regimes*, Sharpe, 1987; "Institutional Accommodation to Full Employment: A Comparison of Four Policy Regimes," in H. Keman & H. Paloheimo (eds.), *Coping with the Economic Crisis*, London and Beverley Hills, Sage. See <https://www.upf.edu/web/esping-andersen.%20>, retrieved in June 2019.

ies of the time such as those of Wilensky, Flora and Heidenheimer, and Mommsen (Arts & Gelissen, 2002, p. 138). However, despite the positive reception and wide publicity they received, various aspects of his proposals also received harsh criticism. With regard to the way his categories—liberal; residual; conservative meritocratic; and social democratic universalist—were constructed and their usefulness, the discussion centered on their theoretical scope and whether these are ideal or real types. In addition, it was suggested that there may be a need for a fourth type that described the combined form of welfare provision in Mediterranean countries (Esping-Andersen, 2000; Arts & Gelissen, 2002; Schubert, Hegelich & Bazant, 2009). When it came to the few references to families and the invisibilization of the work of women, one of the first criticisms came from Lewis (1992) who suggests the need to incorporate the relationship between paid/unpaid labor into the concept of the welfare regime and the contribution that the latter represents to the welfare of families. At the same time, Lewis proposes a typology of welfare regimes based on the model of the male provider.⁵

In the *Social Foundations of Postindustrial Economies* (1999), Esping-Andersen responds to these critiques and expands his arguments giving special attention to the issues raised from the fields of gender studies and feminism. On the one hand, he recognizes that the typology of the severely criticized “three worlds” was “a typology too narrowly based on income-maintenance programmes, too focused on only the state-market nexus, and too one-dimensionally built around the standard male production worker” (p. 73). When it came to adding a fourth type (Mediterranean, conservative, and highly family-oriented, with a strong presence of the Catholic Church) and the criticisms of the criteria on which the typology was based and its “rigidity” (related to its inability to capture the transformations after the 1980s), Esping-Andersen provides two arguments: on the one hand, he sustains that his typology does not refer to individual programs; on the other, he argues that the types proposed are derived from European political economy and refer to the socioeconomic conditions existing in the 1970s and 1980s, a period when welfare states had matured; that is, a structure of massive industrial production: a class structure in which the male manual worker was the prototypical citizen and a society in which the prototypical family was stable and had only one source of income.

What is true is that as result of his contributions, the objections they provoked, and the broad and open debates they stimulated, the category of

5 We reconstructed these discussions in Paura (2013).

welfare regime allowed (as Minteguiaga & Usabart-González, 2017, p. 215, summarize): for the construction of an comprehensive approach to social interventions beyond sectoral fragmentation; for overcoming the quantitative approach, whose principal variables were social public expenditures or the coverage and quantity of benefits that they provided; for the benefits provided through the market, the family, and the community, in addition to those of the state, to be taken into consideration; and finally, for “not losing sight that the principal research objective is to explain the societal model that is constructed through such interventions and their effects” (p. 215). In addition, the discussions initiated by feminist authors about the analytical model centered on the male provider in the Fordist order, and on the crystalized forms of familiarization in welfare provision, broke barriers to new studies and to the deconstruction of interpretative frameworks that could not account for new family and gender arrangements. Finally, the situated and relatively changeable relationship between the three spheres of welfare provision, established in each country through the concept of the “welfare mix,” has made it possible, among other things, to generate debate about the types of welfare regimes that Esping-Andersen proposed and the dimensions needed to operationalize this analytical matrix. Thus, for example, the controversies about how to measure commodification and familiarization allow us to consider, as does Chiara Saraceno (1997), that it could be a question of “degrees” and consequently that it is possible to develop more refined readings of national configurations that do not fit into a paradigmatic typology.

Finally, if the new category led to new approaches to the arrangements and the scope of welfare within the European Community and advanced industrialized countries, how could this conception and the original typologies be applied to cases in Latin America? What other questions did it play a role in raising?

“Translation”: the study of welfare regimes in Latin America⁶

In Latin America, the first stage in the dissemination of the category of welfare regime took place in the 1990s as a reaction to the publication of Esping-Andersen’s *The Three Worlds of Welfare Capitalism*. In Argentina,

6 This subheading and the next refer to the notions of translation and tradition as they are used by Ana Grondona in her thesis “‘Tradición’ y ‘traducción’: un estudio de las formas contemporáneas del gobierno de las poblaciones” (“‘Tradition’ and ‘Translation’: A Study of the Contemporary Forms of Governing Populations”) (Facultad de Ciencias Sociales, UBA, 2012), which we think does a very job of capturing the placement of our countries into certain tendencies, but also allows for the retrieval of their specificity.

for example, the dissemination of this publication took place at a time when the field of study of social policies was being established (Soldano & Andrenacci, 2005) and, we will analyze in section three, was associated with the idea of “hybrid regimes,” which was insufficiently problematized later. These first applications of the category allowed for the retrospective analysis of welfare schemes and protection arrangements derived from the combination of predominantly authoritarian political regimes and import substitution industrialization, and led to questions about the neoliberal adjustment that had begun to bring changes to protection systems and their effects. Other studies undertaken soon after, as the category was once again applied to the region once the neoliberal reforms had been consolidated, used the proposal to construct a typology to inform discussion of local welfare models, to recognize the differences between countries and, above all, to point out that in Latin American societies, societal formulas—taking into account arrangements between the state–market–families/women and community—had their own particular characteristics that needed to be identified and analyzed. These works enriched our understanding by proposing vernacular typologies instead of trying to fit local developments into typologies based on developed countries.

The first proposal was published by Filgueira in 1999. The author contrasts his interpretation with that of Carmelo Mesa Lago (1989). Mesa Lago distinguishes the development of social security policies in the region by taking into consideration the chronological origin of the first pension programs, medical/maternity insurance, and the level of development as criteria to classify pioneering, late, and intermediate countries.⁷ In contrast, Filgueira constructs a typology of welfare models and/or social benefits system established within the framework of import substitution industrialization. Taking into account the specific characteristics of the countries in the region, the author problematizes the category of welfare regime imported from Europe. On the hand, he underlines the specificity of Latin America’s political dynamics and the alternation of democracy–dictatorship, as well as other factors such as the relative weakness of the labor movement, the irregular functioning of the market, the influence of oligopolies and monopolies, and the existence of labor markets with high levels of informality. In addition, he distances himself somewhat from the contributions of European authors who argued that to analyze welfare states it was important to take into account “how” rather than “how much” funds

7 For more information see Filgueira (1999) and Del Valle (2010)

are spent. For this Uruguayan sociologist, it is necessary to keep in mind the high level of disparity in our region related to “how much,” a central question that must not be left aside in the analysis.

In addition, he proposes using the level of maturity of a country as an intermediate variable that is explained at the same time by antecedent variables. He considers the main indicators of coverage (a certain form of the “how” of expenditures): expenditures (the “how much”), sectoral distribution, and levels of service provision (an additional estimation of the “how” of the expenditures, especially in education). He also incorporates the level of social development in each country, and arrives at his typology of welfare models made up of three types of data from 1970 (and in some cases, 1980)—that is, the time when the import substitution industrial model reached maturity.

The first types, which he calls “stratified universalism” (Uruguay, Argentina, and Chile), were characterized by the early development of welfare and protection systems, provided to the majority of the population through social security mechanisms and substantial stratification of benefits and conditions for access to them. In “dual regimes” (Brazil and Mexico), the stratification was greater and territorial heterogeneity played a role, with extensive rural sectors and some states excluded from social security. The third group, the “exclusionary regimes” (Dominican Republic, Guatemala, Honduras, El Salvador, Nicaragua, Bolivia, and Ecuador), implemented elitist and exclusionary social security systems (only 20% of the population was covered) and dual education systems as a result of the actions of predatory elites who, taking control of the state apparatus, extracted rents from primary economies and avoided the creation of collective goods.

Filgueira’s typological proposal makes it clear that the ideal types that fit OECD countries are not very useful for the study of Latin American cases. Nevertheless, he allows the notion of “regimes” to be reclaimed to encapsulate the articulation between the forms and scope of security and protection provision on the one hand, and economic dynamics and development models on the other. Without giving great attention to the issue of commodification or decommodification of welfare, Filgueira works with the dimension of stratification/effects of the social structure in order recognize that, for example, even under a stratified universalism, the societies of Argentina, Uruguay, and Chile benefited from the effects of distribution.

In a critical dialogue with this scheme and retrieving Esping-Andersen’s dimensions of commodification/decommodification and familization/defamilization, Juliana Martínez Franzoni (2005; 2007) proposes a typology of welfare regimes from the perspective of gender. In this second stage

in the application of the category of welfare regime, the incorporation of critiques by feminist authors brought to light the importance of the role of families and women in welfare provision in countries of the region. Their contributions are fundamental to understanding some of the particularities of welfare regimes in Latin America.

Martínez Franzoni's empirical research, covering 1998–2004, highlights the complex processes and factors that must be understood and that differentiate Latin American countries from more developed ones. Together with weak or in-existent social policies, families play a central role in survival, particularly through unpaid female labor; in addition, economic labor insertion is not the norm. Since labor markets and public policies are not stable or solvent, a significant percentage of the population cannot manage the risks they face through the labor market or through public policies. Rather, according to Franzoni (2007), these are markets that are highly informal, and the allocation of government resources does not meet the needs of the population.

In her studies, the author describes the types of welfare allocations, recognizing the participation of families, markets, and governments, and notes that among the different coexisting practices of resource allocation, some of which predominate over others, there is also a “third sector”⁸—or the solidarity economy—as well as forms of international and associative cooperation that give rise to resource allocation in some form. On the basis of a statistical analysis of aggregates, the author identifies three types of welfare regimes: state–productionist, state–protectionist, and family.

During the same period, a number of important comparative studies led to the creation of other typologies in an effort to establish vernacular criteria for classifying the regimes of medium and less developed countries. As summarized by Cruz-Martínez (2019), these can be divided into three groups: i. studies that recognize that different regimes exist in the region, such as those mentioned above as well as Barba Solano (2009), Huber and Stephens (2005) and, more recently, Pribble (2011); ii. studies that group all Latin American countries together (Gough & Wood, 2004; Gough, 2013; Barrientos, 2004); and iii. more recent studies that discern intra-national regimes, which we will discuss later. In this body of work, all of the authors note the changes that affected welfare schemes due to the application of neoliberal policies in the late 20th century. Applying various distinctions,

8 The incorporation of the “third sector” is a step forward in clarifying that the terrain of social reproduction is not exclusive to the family and/or the state, in that it requires an intermediate analysis related to the visualization of communitarian and local social fabrics (Picchio, 2001).

the studies note the limitations in the protection provided to the high percentage of workers in the informal sector, as well as the tendency to privatize welfare in the new neoliberal order.

Among these authors, Ian Gough underlines the potential of the category of “welfare state regime”⁹ as a powerful framework for studying social policy in contexts of development, for four reasons: “First, the welfare regime approach is precisely concerned with the broader ‘welfare mix’: the interactions of public sector, private sector and households in producing livelihoods and distributing welfare – a dominant theme in the development literature. Second, it focuses not only on institutions but outcomes – the real states of well-being or ill-being of groups of people. Third, it is a ‘political economy’ approach which embeds welfare institutions in the ‘deep structures’ of social reproduction: it forces researchers to analyse social policy not merely in technical but in power terms, and this has much to offer. Fourth, it enables one to identify clusters of countries with welfare features in common; it holds out the promise of distinguishing between groups of developing countries according to their trajectory or paths of development” (2004, p. 26).

Now, fifteen or more years after the majority of these studies were published, the classifications they provide are being revised by authors such as Analía Minteguiaga and Gemma Ubasart-González (2014; 2017), as a result of the “progressive shift” in some countries of the region. These changes are even being revised by the creators of the typologies who “took a snapshot” of the state/family/market institutional arrangements and their effects in terms of protection and welfare between the end of the last millennium and the beginning of the new one (Filgueira, 2013; Barba Solano, 2016; 2018). These revisions were necessary due to the changes during recent decades that led to a larger role of the state in protection schemes, de-commodification, and tendencies toward familization or defamilization resulting from gender agendas in a large number of countries, as well as the greater or lesser weight of non-contributory transfers. In the words of Barba Solano (2018, p. 103), “the combined result of the liberal reforms between 1980 and 1990 and the universalist reforms of the first decade of the 2000s is that regional welfare regimes have undergone important transformations.” In this sense, a revision of the characterizations of the Argentine case in the typologies mentioned above and the limits of these classifications can be a rich source of material for updating the study of welfare regimes in the region.

9 Gough (2004, p. 26) notes that he uses the term “welfare state” following Esping-Andersen’s usage in his first book. Later, the Danish author used the term “welfare regime,” but Gough thinks it is important to maintain this distinction in the typology he constructs.

“Tradition,” heritage and typologies, keys to study the Argentine case

The clarity with which social phenomena are perceived by the scientific disciplines that study them varies depending on the historical times and conditions under which the research is produced. In general, these processes are analyzed employing a set of tools: new questions are raised, categories and methodological proposals are reviewed, and there is scrutiny of some assumptions and conceptualizations of the ways that phenomena and social processes are studied at a given moment in time. To what extent and from which viewpoint did the category of welfare regime and Esping-Andersen's typology influence definitions of social policies and welfare in Argentina? Considering the context in which they were produced, what were their main contributions and legacy?

Understanding the way that welfare regimes were conceptualized, defined, and characterized by local authors, as well as which characteristics were chronicled in the Argentine case from these perspectives, requires an understanding of the time period and conditions under which they were produced. As we analyzed in another article (Paura & Zibecchi, 2014), the studies of social policy that were re-established after democracy in Argentina were characterized by two processes that affected the revision of research agendas, and which converged to a certain extent. On the one hand, theoretical methodological permutations and alternative paradigms appeared in the social sciences. The return of many exiled researchers and the renewed organization of the social sciences at universities opened up a space to propose new forms of research on social phenomena and processes. Access to lines of research being pursued in Europe and the United States motivated different approaches that revealed processes of interdisciplinary exchanges. In this context, the study of the state, its institutions and its policies figured prominently.

The second process was the transformation of the socio-political matrix of state centrality (Repetto, 2001), which had governed the development of the configuration of social policies in Argentina until the 1990s, strongly marking the social policy research agenda. The structure of the new matrix on a basis of privatization, decentralization, and focalization imposed practically empirically a consideration of the changes that were taking place (Paura & Zibecchi, 2014), including the institutional arrangements by which welfare “was produced.”

In this context, the renewal of the nation's universities, the creation of new ones as well as the increased protagonism of existing institutions in the

field of public policies,¹⁰ became an important and indispensable antecedent. There was considerable analysis of the “crisis” of the autochthonous welfare state in its multiple manifestations: structural reforms, the consequences of “structural adjustment,” the debate about poverty in the context of democracy, the social assistance orientation of government interventions, and the dismantling of the institutions that provided welfare. Some of the most important contributions by authors who played a pivotal role in this period include those of Lo Vuolo and Barbeito (1998); Lo Vuolo, Barbeito, Pautassi and Rodriguez (1999); Golbert, Lumi and Tenti Fanfani (1992); Isuani (1985; 1992); Bustelo and Isuani (1990); Minujín and Kessler (1996); Tenti Fanfani (1989); and Feldman, Isuni and Golbert (1988). Commenting on these studies, Grondona (2017) notes that paradoxically, despite this outstanding body of work, most of the analyses of the social state’s deconstruction during the decade of neoliberalism were on the basis of explanations and descriptions that referred to the way this occurred in other places (particularly in France).¹¹ According to the author, this tradition overshadowed research on the transformations that were underway and was an obstacle to understanding later innovations, given a certain overestimation in the analyses of the forms of protection inherited from the “welfare era.”

For her part, Ramacciotti (2010) argues that it is important to understand how the “stages of development” of social policies were analyzed in Argentina. One of her hypotheses concerns how theoretical conceptualizations of the characteristics that the state took on in the post-WWII period were applied to this South American country. In this framework, the Peronist era (1943–1955) resembled a “pseudo welfare state,” an “imperfect welfare state,” a “South American-style welfare state.” Ramacciotti points out that just like all theoretical imports, the use of this scheme ended up ignoring empirical evidence and the distinct, historically created relationships that exist.

These observations provide keys for interpreting Lo Vuolo and Barbeito’s (1998) proposal. They use the category of welfare regime as well as Epsing-Andersen’s typology to explain the evolution of the creation, maturity, and crisis of the Argentine welfare state, which they define as a “hybrid regime”:

10 As part of the increasing protagonism of the revamped and newly created centers for research and dissemination—acting as civil society organizations—the Interdisciplinary Center for Public Policies (Centro Interdisciplinario de Políticas Públicas, CIEPP), established in 1989, played an outstanding role in the study of public policies. Authors such as Rubén Lo Vuolo, Alberto Barbeito, and Laura Pautassi (who are mentioned in this section) did their research at this center.

11 According to Grondona (2017), this tradition overshadowed research on the transformations that were underway and was an obstacle to understanding later innovations.

In the case of Argentina, the corporative model dominated the development process of the welfare state regime but at the same time many social-democratic elements were also incorporated; the liberal component played a marginal role. In Argentina, the laws of motion of the **hybrid regime** have much to do with the crisis of the welfare state and with the characteristics of the steps taken to transform it. It is important to understand this process because the new welfare state regime is, to a great extent, dependent on the dynamics of the previous model. (Lo Vuolo & Barbeito, 1998, p. 111)¹²

Using a conceptual framework that assumes the evolutionary development of social policy as an organizing principle, these authors provide a “historical review” of social policies up until their “maturation,” and go on to concentrate on the “crisis” as a deficit of rationality on the part of the Argentine welfare state. They analyze the economic and fiscal environment, the labor market and the distribution of income, the political and ideological environment, and the programmatic environment (pension, education, health, family allowances, housing, health, and other policies). Through an analysis of these transformations, Lo Vuolo and Barbeito (1998) problematize the “dismantling” of the institutions that produce welfare under a democratic government.

In any case, regarding the question of why Argentina appears to be an **anomaly** in relation to the usual understanding of these questions, an initial answer is that **the development process of autochthonous welfare state institutions did not follow the typical paths of European democratic experiences** (Lo Vuolo & Barbeito, 1998, p. 19).¹³

Incorporating the same assumptions and in an environment that was propitious to the creation of new fields of study, the contributions of research with a gender perspective were key. As we note in another study (Paura & Zibecchi, 2014), between the mid-1980s and the beginning of the 1990s, a research area was created to concentrate on certain social phenomena affected by gender. According to Ramacciotti (2010), historians such as Marcela Nari, Mirta Lobato, and Dora Barrancos demonstrated that gender markings were a performative and foundational element of all social policy. At the same time, these authors noted that social policy is an area that can tend to be inclusionary, but can also be characterized by a logic of exclusion, marginalization, and subordination of women.

12 Emphasis ours.

13 Emphasis ours.

The pace of the neoliberal reforms of the 1990s, with their varied impacts on different population groups, the increase in the number of female heads of households, and the high level of un- and under-employment of women created a new situation and raised new questions that traditional studies of social policies could not answer; the approach they used was not sufficiently sensitive to grasp the differential impact on women during the welfare “crisis.” From the field of social rights and through analysis of their relationship with citizenship, Laura Pautassi provides an interpretive proposal that takes into consideration the differential and discriminatory treatment of women by the welfare state in Argentina:

The institutional arrangement called the “welfare state,” whose bases were established between 1943 and 1955 [...], was characterized as “hybrid,” with a strong corporative-meritocratic component and under the assumption of a distributive agreement focusing on work relations [...] This resulted in a “paternalistic” vision of women, protected by marriage if they were “under the charge of a man” or if they became widows. For the rest of women (single, single with children, co-habiting), and if they had not entered the workforce, the predominant practice was [to receive] no provisions. (Pautassi, 2000, p. 113).

Once again, the idea of hybridity demonstrated an updated understanding of Esping-Andersen’s proposal as well as a gravitation toward European interpretative models to explain local processes.

Without doubt, these analytical proposals contributed to the development of lines of research and to a productive debate at the time. In addition, they proposed a “lens” of interpretation at a time when great changes were taking place in production conditions. As a result, a legacy was created and a tradition was consolidated that allowed for the organization of universes of meaning, operational criteria, and conceptualizations, with a view to using analytical terms for organizing the profound transformations of the institutions that produce welfare. Following the research from the period of Lo Vuolo and Barbeito (1998), Pautassi (1995; 2000), and Lo Vuolo et al. (1999), we can summarize some of the dimensions and particularities of their legacy:

- It was assumed that the development of typical welfare state institutions was an essential part of the economic process and social integration in Argentina. For the authors analyzed here, the expansion of public services and fiscal schemes had important consequences for the structuring of social classes and in the functioning of the economy.

- The European experience was a compulsory point of reference. Thus, Lo Vuolo and Barbeito (1998, p. 18) note that “contravening the European experience”¹⁴ in Argentina and in the majority of Latin American countries, the absence of the political play of competitive political parties was a characteristic of the process of maturation of the Argentine welfare state.
- It was recognized that the process of “maturation” had several elements in common with the European experience: a rapid increase in social expenditures; a program and coverage proposal; an increase in public benefits; and the expansion of massive economic regulatory mechanisms.
- The Argentine social security system could be, according to these authors, conceptualized as a hybrid of two models: first, the “Bismarkian” tradition in which the rights derived from the labor relationship prevail over those provided for the whole of the people, and second, the “Anglo-Saxon” labor tradition that seeks to cover the whole population, regardless of the economic activity in which workers are engaged. In this way, they identified the dynamic of a “corporativist-meritocratic” regime but with a universalist discourse.
- In terms of social rights, the concept of a hybrid model was applied in the analysis of differential impact on women. According to Pautassi’s (1995; 2000) analysis, because the main forms of social security (pensions, health insurance plans, family allowances) covered workers (employed men), a differentiation was created in Argentina between men and women in fact and in law.

It is interesting to retrieve the contributions of local authors who took on the challenge of interpreting the rapid transformations of welfare measures in Argentina during the 1990s. Nevertheless, and at the same time, there is a clear need to revise some of the closed a priori interpretations, which display Eurocentric biases—where the point of comparison are European countries—and which display little sensitivity to the specificities of these matters in autochthonous contexts.

Similarly, typological studies on welfare regimes in Latin America use their own categories in order to avoid previous classifications of countries as “peripheral,” “dependent,” or “late experiences of urban-industrial modernization” and were important for the study of the Argentine case. In addition, Filgueira’s inclusion of the case of “stratified universalism” allowed

14 Flora (1986) points to political stability as one of the crucial elements of the favorable constellation of factors that correlated with the development of welfare states in Western Europe.

for recognition of the tension between a significant expansion of goods and services and their segmentation, associated with the benefits provided to formal urban workers in the import–substitution industrialization sector. On the other hand, the inclusion of Argentina in the “productivist state” category proposed by Martínez Franzoni reflects the commitment of its state to the provision of resources, while keeping in mind the restrictions and tendencies resulting from the application of neoliberalism. In both cases, the classification typology allows us—as Esping Andersen (2000, p. 101) would say—“to see the forest instead of the trees,” revealing fundamental attributes and recognizing the logic underlying its dynamics and even, perhaps as a result of this, providing the tools needed to generate hypotheses about these processes. More recent studies (Pribble, 2017; Barba Solano, 2016, 2018) focus on—among other things—political dynamics and the weight of non-contributory transfers and, as a result, also recognize the specificities of the Argentine case.

An open research agenda

In studies about the transformations and continuities of welfare schemes in Latin America, key contributions have been the category of welfare regime and discussions about the typologies that could be the most useful. It is worth reviewing what has been learned as well as renewing research agendas. This section is devoted to these two tasks.

In relation to what has been learned, we know of course that the problem of applying imported categories and the dangers of certain Eurocentric narratives was not unique to studies of the welfare regime in Argentina. Faced with this issue, Draibe and Riesco (2006) suggest using intermediate categories that allowed for the use of new concepts to examine experiences that had not followed the “typical path” of European countries. According to the authors, it is in this intermediate range where one can also find heuristic value: they allows us to retain certain general attributes of a phenomenon and, in addition, to capture those that pertain to particular cases. This level of abstraction is essential and should not be confused with general and abstract categories (such as those of the welfare state), or with specific concepts that refer to concrete cases or configurations (for example, a specific social program). Thus, the coordinates provided by the studies of welfare regimes can lead us to avoid two risks that are common in historical comparisons of complex economic and social development processes. One of these are inappropriate generalizations, that is, the formulation of general laws or the proposal of a single path or trajectory or of stages that “must” be followed by every country in the world. This leads to classifications such as

welfare regimes that are considered “embryonic” or “incomplete” as Draibe and Riesco (2006) warn. At the same time, it is important to avoid another risk: “historicism,” which considers each country as a unique, exceptional, and irreducible case that cannot be analyzed by way of categories involving a higher level of abstraction (Gough, 1999).

The field of gender studies has also provided warnings about avoiding “first world” biases when analyzing the characteristics of the domestic (or family) sphere, the care this provides, and the characteristics and availability of care services from the state or market spheres. Bringing together the foundational contributions of welfare regimes studies with feminist critiques, the lessons learned from local traditions, and the warnings of biases provided in more recent research invites us to confront not only concepts but also the comprehensiveness of the typologies proposed to analyze our autochthonous welfare regimes.

Now, in relation to the research agenda discussed here, we would like to note that in all the cases reviewed, the classifications provided deal with welfare schemes on the “national” level and give little or no recognition to regional differences within each country. We consider that opening a discussion on methodological nationalism is a starting point for exploring other approaches.

Our proposal falls within the third group in Cruz-Martínez’s (2019) classification cited above: the studies centered on the “intra-national” differences in welfare regimes. According to the author, this third set of studies on welfare regimes proposes the need to go beyond the national level to explore possible intra-national welfare regimes and demonstrate the territorial dynamics of social policy. He identifies studies that demonstrate significant variations between different sectors of social policy within the welfare regimes of countries with solid welfare states (Gough makes this clear when pointing out that the so-called “liberal Great Britain” still has a national health system; Ratigan shows that there is systematic sub-national variation in the provision of different types of welfare in all the Chinese provinces) (Cruz-Martínez, 2019, p. 11). When it comes to Latin America, Cruz-Martínez (2019) confirmed the existence of intra-national welfare regimes in Puerto Rico from a bottom-up perspective, based on the importance of traditional and alternative welfare providers in facing up to social risks and promoting welfare in the following different policy areas: housing, nutrition, health, education, maternity/paternity, disability, unemployment, and old age.

At the same time, in European countries, the debates in recent years about welfare regimes intersected with the consideration of subnational

levels of the state (Vampa, 2015; Martínez- Buján, 2014); a similar analysis was also applied in the study of Brazilian states to order to bring to light profound qualitative differences experienced by the population in relation to public services received, and to understand the essential causes for the heterogeneity at the heart of Brazilian social protection system (Rodrigues, 2010). These studies demonstrate that the decentralization of policies and the implementation of focused policies has had a very different impact in Brazil. This impact was greater in those municipalities, states, and regions where previous institutional arrangements did not exist; that is, those in which the government (federal or state) had not developed its own policies and maintained a specific tradition of service to communities. In general, these studies indicate that subnational welfare regimes are relevant units of analysis for understanding structural diversification policies within national states, and for the comparison of different national realities.

We believe that these approaches can contribute to an improved understanding of the Argentine welfare regime or its intra-national/subnational regimes. To start with, it must be kept in mind that the country's federal political system provides a degree of decision-making autonomy to subnational jurisdictions. In this sense, federalism is a characteristic that distinguishes Argentina from other countries in the region with the exception of Mexico and Brazil. While some recent studies center on the conditions for the development of autonomous subnational social policies, in particular Bonvecchi (2008)¹⁵ and, more recently, Niedzwiecki (2018), there has been no progress toward the recognition of subnational welfare regimes. A research agenda that recognizes the uniqueness and specificity of the subnational level and that allows for questioning of the degree of importance of "methodological nationalism" (the "naturalization" of the nation-state as a unit of analysis) can prompt new questions about the possible existence of different welfare regimes within the same country and about the possible regularities that can reveal institutional differences and different results in terms of welfare.

On the other hand, consideration of the Argentine case, its federal political organization, and the ample diversity of existing arrangements (taking into account demographic, productive, political, social, and cultural variables) in subnational jurisdictions can not only be a way to analyze this case but also a crucial approach for updating and discussing the pre-existing typological classifications.

15 Following Bonvecchi (2008), we understand subnational autonomous policies to be those that seek to deal with issues that are different from those existing on the national level, or those that deal with the same matters but using different tools or with different objectives.

Conclusions

The review presented in this article demonstrates that Esping-Andersen's work, over and above the currency of the discussions and the creation of other typologies that challenged his, made a lasting contribution in various ways. Some researchers consider the essence of his contributions as going beyond the public–state sphere as a producer of welfare to take into consideration the market, the community or social, and the family spheres, thus providing a more integral approach over and beyond sectoral fragmentation.

Beyond these ongoing debates focused on European countries, the category of welfare regime “traveled” to Latin America with a certain heuristic richness in that it not only enabled comparative studies on the trajectories of countries that provide welfare but also inspired discussion of the operationalization of this analytical category in contexts of high societal inequalities. In addition, as we pointed out, the existing literature already allows us to identify regional and local specificities. For example, Filgueira's typology demonstrates demonstrated how, even in the “stratified universalisms” of societies such as Argentina, redistributive effects are present. At the same time, the gender and feminist studies related to Latin America that we reviewed are promising for several reasons: they emphasize the importance of understanding the logic of segmented labor markets (in both the formal and informal sectors); visibilize the fact that “economic labor insertion is not the norm” (Martínez Franzoni, 2005); and stress the great heterogeneity in the organization of social care derived from family dynamics, labor markets, and highly differentiated economic structures in states with varying traditions. Thus, a common characteristic of the region is the role of women in the provision of care and in family reproduction (Esquivel, 2012), among other areas.

This article also reviews interpretations of the “welfare crisis” in Argentina in the 1990s, recovering their legacy. The understanding and construction of objects of study is a complex task. For this reason, it is very useful to understand new approaches in the context of the ideas of the era, the mode of production, and the “import” and “export” of knowledge. Nevertheless, with the purpose of proposing a study agenda for the future, we draw attention to the need to review theoretical traditions that can provide new insights, while taking the precaution to recover the autochthonous and the local.

As a contribution to this agenda, we propose that the subnational level be given theoretical and methodological identity as a unit of analysis: that it no longer be considered a residual category. The role of subnational governments in generating autonomous social policies should be considered in addition to the social, demographic, and economic configurations and

the policies that play a role in the creation of local welfare regimes. Inquiry into these matters can lead us to think of the subnational as a scale of complex analysis through which we can find a variety of experiences and traditions in the production of welfare, thus avoiding its consideration as a homogeneous level.

Identifying and describing subnational institutional welfare arrangements and their existing architecture is, in our view, a powerful way of capturing their singularity and diversity, and serves as a starting point for discussion and contributes to a “national” definition that will form part of a future research agenda. This approach could facilitate the nullification of the historical identification between “the national” and the “*porteño*”¹⁶ for example, which recognizes the complexity of the federal character of Argentine political organization as well as the regional differences that imply diverse demographic, social, productive, and cultural dynamics. We think that visibilizing these differences does not mean denigrating the character nor the national identity of Argentina, but rather capturing a constitutive aspect of this condition and its historicity. In this sense, the recognition of subnational regimes makes it possible to recognize specificities and common aspects, and, on the basis of these, to discuss the characterization of an “Argentine” (autochthonous) welfare regime, in dialogue with classifications of regimes in Latin America.

16 A colloquial adjective referring to people who were born and/or live in the city of Buenos Aires (that is, the Federal Capital of Argentina).

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