

# Universal Social Protection in the Global South: Architectures, Trajectories, Narratives

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## Take away

Achieving universal social protection requires sustained and ongoing incremental efforts by governments. By unifying policy architectures, appealing to cross-class coalitions, and challenging austerity narratives, comprehensive coverage and equal benefits for all can be achieved.

## 1. Introduction

Securing decent formal jobs, or labor incorporation, in the global South has become increasingly difficult. Millions of people are forced to work in the informal economy, where wages are low and social protection is absent. The labor challenges are compounded by automation, AI, and robotization, which further emphasize the need for social incorporation, even among the well-educated and affluent.

Universal basic income can help with social incorporation. It transfers cash to the population, including the elderly, sick, young, and unemployed. This is particularly helpful for unpaid caregivers, who are often women. However, expenses like private schooling, healthcare, and elderly care may not be covered by basic income alone. Therefore, universal basic services are also needed.

The advantages of universal transfers *and* services have been thoroughly studied, and their importance has been highlighted in the face of complex and rapidly evolving crises (e.g., Standing, 2020; Gough, 2019). The COVID-19 pandemic has made abundantly clear the need to build universal social protection systems to ensure everyone's income security and health protection – target 1.3 on “social protection systems and measures for all, including floors” of the 2030 Agenda for Sustainable Development - is crucial (ILO, 2019; Razavi et al. 2022, 449).

Universal social protection can promote income redistribution, provide more significant support across different segments of society, reduce the stigmatization of people experiencing poverty, and enhance productivity. Additionally, it can strengthen social

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<sup>1</sup> This paper is based on and expands on ideas we elaborated on in Martínez Franzoni and Sánchez-Ancochea (2016; 2018; 2022).

cohesion in a world threatened by injustice, limited opportunities, and the new challenges artificial intelligence and climate change bring.

Even though international agreements and practical instruments like the Global Partnership for Universal Social Protection (USP2030) advocate for universal social protection in the North and South, challenges are well noted. Expanding high-quality public healthcare and emerging social protection programs like early child education and care in countries with weak state institutions face several obstacles. In the past, many programs designed to be universal, including primary healthcare and education, ended up condemning people in poverty to low-quality services. In Central America, Bull's research indicates that weaker states tend to have more powerful elites, less inclined to improve their fiscal capabilities (Bull, 2014).

Achieving universal social protection requires a sustained and ongoing effort by governments to ensure that everyone receives the same benefits. Policy architectures comprise funding, benefits, delivery, and interaction with market options for specific social programs to achieve this goal. In the short term, these architectures determine *who receives what and how*. The more unified the architecture, the closer to delivering a universal policy outcome; conversely, the more fragmented the architecture, the more segmented the outcome. These architectures also define *who and how much specific actors should pay* for countries to provide high-quality services.

Over time, architectures also empower various actors and create incentives that shape the trajectory of future policies. As a result, these architectures can either facilitate or hinder the emergence of positive trajectories through state-building and cross-class coalitions that support the further expansion of universal social protection.

A primary obstacle to promoting universal social protection is austerity narratives. Austerity – often understood as strict measures to control public spending and debt - has been a powerful idea from the nineteenth century to the most recent Great Recession. Despite insufficient and contradictory empirical evidence, during the past hundred years, the narrative of austerity has been so powerful that it has often led to either a problematic reduction in public spending or a stubborn resistance to build adequate fiscal bases for policy efforts (Konzelmann, 2014).<sup>2</sup>

If universal social protection is to provide comprehensive coverage and equal benefits for all, the focus is on how to foster policy processes that:

1. Create incentives to consolidate unified policy architectures, for example, by identifying openings and “low-hanging food” in the context of specific policy processes.
2. Maintain consistent efforts to consolidate policy instruments over a prolonged period.

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<sup>2</sup> Even though policy determinants are not the focus of this article, the type of policy tools deployed during pandemics also depended on whether or not elites were able to personally and economically isolate from the natural and societal effects of contagion (Gunderman, 2019; Oldstone, 2020). It also mattered whether vulnerable people were able to voice their demands (McDonald, 2020).

3. To secure the required level of funding, it is crucial to appeal to appropriate cross-class coalitions while also regulating private options. This will enable more efficient utilization of public resources.
4. Consider the power of ideas seriously and elaborate compelling narratives capable of challenging deep-seated austerity ideas

Below we expand on these ideas.

## **2. The prominent role of politics**

Providing universal income and services can have advantages, but there are challenges in creating, adopting, and executing them properly, especially in the global South. How can these challenges be overcome? Many studies have emphasized the importance of democratic institutions, electoral competition, and left-wing political parties in implementing effective social services and transfers in the South (e.g., Filgueira, 2007; Huber and Stephens, 2012; Lehoucq, 2012; McGuire, 2010; Rudra and Haggard, 2005; Sandbrook et al., 2007; Segura-Ubiergo, 2008).

Electoral competition and party ideology can influence the level of investment in social policy. When maintained over a long period, democracy can create opportunities for left-wing parties and progressive social movements to advocate for broader social protection. However, more than these factors are needed to ensure universal social protection. In some cases, even progressive governments with high ambitions may fail to make much progress or even move in the wrong direction.

Between 2003 and 2013, Latin America experienced significant growth in social policies, driven by economic progress, electoral competition, and the “left turn.” This expansion included increased public spending, expanded access to benefits, and even more extraordinary generosity toward recipients. Despite this positive trend, however, the legacy of earlier policies continued to shape the design of new programs, leading to a patchy and segmented system of social protection. This resulted in unequal access to benefits for different groups, including formal versus informal workers, insiders versus outsiders, and the middle class versus people living in poverty. While progress was made, it was not universal, and much work remains to ensure a fair and just system for all (Arza et al., 2022).

When expanding universal social protection systems, decision-makers face a dilemma. They are often pressured to rapidly increase coverage, regardless of the quality and equity of the system. However, building a unified policy architecture requires a careful combination of access, generosity, and equity to gain political support for successive expansions in the right – universal rather than segmented - direction.

Proposals from international institutions, such as the social protection floor, often need to pay more attention to long-term political requirements. These would require explicitly considering the impact of initial measures on various stakeholders, the need for additional funding, and the importance of building broad societal coalitions. For example, the ILO’s social protection floor suggested bringing social assistance and insurance under an overarching plan. However, as social insurance and social assistance have separate supporters and administrative structures, it is essential to establish appropriate incentives that

facilitate their interaction. Otherwise, the social protection floor can reinforce a two-tier system for low-income and non-poor people.

In highly unequal societies, powerful actors have fewer incentives to promote inclusive social policies. The emergence of autocratic governments poses additional challenges to implementing policies that benefit all individuals. Far from solely relying on coercion, these governments must establish legitimacy, often through social protection interventions. However, without democratic counterweights such as independent media or social organizations free to express their demands, arbitrary and clientelist measures become more prevalent. Further research is necessary to comprehend current developments, especially under *electoral* autocratic regimes.

To achieve universal social protection in the South, countries must focus on the gradual creation of suitable political and institutional conditions. It is essential to pay attention to the progress and direction of change. Let us delve deeper into this concept.

### **3. Building step by step: the role of architectures and long-term trajectories**

How have countries created paths toward universalism? The policy architecture concept deals with the variety of tools that policymakers have used and can use to establish universalism in the long run. The crucial question is whether these tools promote policy architecture's unity or division. By contemplating the correct architecture, it also compels us to consider developing better political conditions for delivering universal policy outcomes.

Below we draw on the historical record to unify policy architectures and explore challenges faced – including resource limitations - in achieving universalism.

#### **Policy architectures can broaden the range of choices available.**

As a collection of instruments that determine which benefits are accessible to whom and how, policy architectures involve five main components:

- a. *Eligibility*: This dimension refers to who is entitled to receive benefits and under what criteria. The three eligibility criteria studied in the literature are citizenship, contributions, and need (Esping-Andersen, 1990). These three criteria can be displayed alone or in different combinations.
- b. *Funding*: Sources may be general revenues, earmarked taxes, and payroll contributions. They can also come from a broader range of options that include resources from illicit flows and corruption (Ortiz et al., 2019). Progressive co-payments can be considered as long as they do not entail different services.
- c. *Benefits*: States typically establish benefits through statutory regulations. Public agencies have various methods of doing this, from assuming that all benefits are included by default to listing everything included or excluded. In certain countries, businesses and employees may also have input in determining the benefits.
- d. *Providers*: There are two types of providers - public and private. Private providers can be either for-profit or not-for-profit. The goals of these providers can either

promote or hinder universal policy outputs. Along with this, the efficiency of the providers also plays a significant role in determining the results.

e. *Regulation of outside options*: It concerns the availability of private alternatives for those who can afford them, which can lead to people choosing to leave state services and receive transfers (Korpi and Palme, 1998). This includes privately funded options and public resources for personal gains, such as doctors having conflicting dual practices (namely, doctors simultaneously working in the private and public sectors without regulation).

Across these policy instruments, *targeting plays a fundamental affirmative role* as it helps treat unequal people differently to achieve equal results.

Policymakers can promote universal social protection by creating a unified policy architecture from the onset or – in most cases – by gradually unifying programs already in place over time.

Unification is essential around benefits and providers: when everyone receives the same services delivered by the same entities—even if funded through different means—they will have more incentives to collaborate and pressure for further expansion. In contrast, an architecture with fragmented benefits and providers will deal with segmentation and result in other groups pushing different agendas.

Policymakers need to focus on how different components interact with each other. The regulation of the outside option influences most other components of policy architecture. It is a crucial matter that needs to receive more attention. Markets tend to fragment services due to incentives such as selecting preferred clients or offering more profitable benefits instead of prioritizing those who need them the most.

Every policy sector has its unique architecture. In many countries, there might be a fragmented approach to a particular area, such as cash transfers, but there could be some form of consolidation in other fields, such as primary health care. With its National Health System but a liberal approach to other social policies, the United Kingdom is a case in point. The challenge to unify social protection programs can thus be very different across countries and policy sectors. Below we give examples.

### **Challenges for achieving a unified policy architecture.**

Policy architectures play two roles. Firstly, various policy instruments yield varying coverage, generosity, and equity levels at any given moment. Secondly, different architectures create unique possibilities and limitations for future trajectories toward a more unified or fragmented approach. The gradual, step-by-step process to unify policy architectures requires some guiding principles: policymakers must understand the desirable endpoint regarding policy results and some of the political levers needed.

When policymakers attempt to unify policy architectures, they encounter three significant challenges. These include uneven benefits from the outset, a strong market alternative, and a need for more financial resources. We illustrate our argument by referring to countries with strong social policies but varying degrees of fragmentation, including Mauritius, South Korea, and Uruguay. Additionally, we reference countries that have attempted to move away

from exclusionary social policies by implementing universal social protection measures, such as El Salvador in the 2000s.

- 1) *Legacy of uneven benefits*: If benefits are distributed unevenly initially, certain groups may be motivated to maintain and increase their advantages over time. This can lead to further division and reinforcement of disparities, as some groups may have more power to influence outcomes.

During the latter half of the 20th century in South Korea, various professions formed their health insurance societies resulting in fragmented eligibility, funding, benefits, and provision. Several Latin American countries faced similar problems, as Haggard and Kauffman (2008) noted. In 1967, Uruguay had nine independent health insurance funds for workers involved in manufacturing. Furthermore, mutual health associations spent 3.1 times more resources per person compared to the public system, according to Mesa-Lago (1978). Similar problems were evident in neighboring countries such as Chile, where social insurance involved over ten different funds with entitlements and obligations spread over two thousand legal texts (Mesa-Lago 1978; Segura-Ubierno 2007). Despite legal efforts by the Chilean government to unify social insurance, fragmentation persisted due to dispersed interests.

- 2) *Private service provision*: Depending on private entities to provide public services or promote a robust, supposedly autonomous private sector can lead to adverse effects. In nations with multiple providers and no adequate government regulation, private providers may gradually gain prominence, leading to more significant disparities between private and public service provision.

In the 1950s, Mauritius set up a healthcare system that provided equal benefits to all citizens through public facilities. However, financial resources were scarce, and services needed to be improved. The wealthier citizens did not use public services, and the rest of the population had to pay fees. Doctors worked in the public and private sectors, without incentives to enhance public resources.

There are various options outside public hospitals and doctors, such as pharmacies and dual medical practice within the public sector that can hinder efforts to achieve universal social protection. In El Salvador, pharmacies have historically been involved in the informal prescription of drugs, resulting in incomplete treatments and high prices compared to other countries in Latin America. As a result, patients often suffer the consequences of unfinished therapies and public facilities are left to deal with the medical complication of an initial minor infection.

In Costa Rica, various regulatory changes contributed to the expansion of the medical dual practice, which blurred the boundaries between the public and private sectors, contributed to unmet timetables, and weakened general performance (Socha 2010). Overpriced medical inputs, purchases of non-essential services, and waiting lists that go well beyond supply shortages are some examples of the conflicts of interest that currently undermine universalism

- 3) *Shortage of financial resources* results in low-quality services and expands the outside option almost by definition. Expanding eligibility can help solve this problem. For example, Costa Rica's social insurance was initially limited to blue-collar workers to allow later dependent family members to join on the same terms as fee-contributing workers. As funding needs grew to sustain high-quality services, policy insiders worked to include white-collar workers, creating a cross-class coalition that supported further expansion. This success can be attributed to the policy design, which made the necessary incentives for broadening eligibility.

Upon taking office in 2009, the left-wing party in El Salvador implemented measures to regulate pharmaceutical prices, which was well-received by the public. Additionally, they took steps to improve access to public medical facilities and encouraged the proper use of drugs by enforcing formal medical prescriptions. While not directly related to the direct provision of public services, these changes did help make better use of public resources.

The challenges to achieving unification are unique to each context, considering geographic and historical factors, and no single solution works for all cases. For instance, Uruguay implemented reforms in the 2000s to expand eligibility and unify benefits across the private and public sectors. This was achieved through the creation of a national fund that collects monthly fees, the allocation of an income per capita to private providers based on age and risks rather than people's income, the establishment of preventive and primary care measures that apply to all and making it possible for people with low incomes to access private providers.

These examples highlight three lessons that are particularly important when introducing new programs (like childcare today in many Latin American countries).

First, *benefits in the public sector must be of good quality*. People are willing to make extra effort to ensure that services are sufficient and of good quality. A prime example is the spread of one-dollar-per-day schools in the global South.

Secondly, *incentives can drive progress towards universalism*: The expansion of eligibility for social insurance in Costa Rica provides an example.

*Public providers should not have conflicting interests with outside market options for optimal results*. Establishing clear guidelines and rules of engagement between the public and private sectors is essential.

### **Incremental change can help tackle the funding challenge.**

The lack of financial resources significantly challenges achieving universal social protection across the global South. With a few exceptions, such as Brazil and Argentina, tax revenues in these countries are relatively low, typically between 10% to 20% of GDP. This contrasts with OECD countries, where tax income averages around 40%. A progressive expansion of their regressive tax base poses challenges due to a concentration of income at the top, large informal sectors, and weak state capacity, as noted by Besley and Persson (2014). Being progressive income taxes complicated to attain, recent tax reforms mostly rely on indirect (regressive) taxes such as value-added taxes, as pointed out by Schneider (2012).

Due to limited resources, many public services, such as old-age pensions, education, and healthcare in countries like Chile, rely heavily on private spending. Unfortunately, this creates a barrier to social inclusion as it limits access to these services for those who need help to afford them. Before the pandemic, private spending in Chile made up nearly half of public spending, with 4.6% and 10% of GDP, respectively. Furthermore, a study on healthcare spending in six Latin American countries revealed that after the expansionary wave of social policy, out-of-pocket expenses still comprised 32% to 60% of all healthcare spending (Debrott, 2014).

In recent years, fiscal space and its limitations have become prominent in discussing expanding social policies. However, the challenge of creating enough budgetary space can often lead to a catch-22 situation. Poor quality services and ineffective bureaucracies can discourage people from paying taxes, making funding and improving those services challenging. Conversely, low taxes make it harder to offer competitive benefits and attract people. It is thus crucial to connect taxation – including private social services - to improving public services.

The shortage of funding for social services is related to how much everyone can benefit from government intervention. When the middle class receives high-quality services, they are more likely to support social services funding. However, governments may need to consider other sources of revenue, such as expanding payroll contributions. This option may be more socially acceptable and effective than other means of improving the financial basis of services. Additionally, it is possible to combine contributory and non-contributory mechanisms, as demonstrated by social security in Costa Rica and healthcare services in Thailand.

Social protection income can come from various sources, from contributions, general taxes, and official development assistance, to eliminating corruption and illicit funding (Ortíz et al., 2019). The restructuring of public debt and debt services can help free resources that can strengthen social inclusion, as occurred in countries like Brazil and South Africa (the former) and Brazil, Costa Rica, and Thailand (the latter) (Durán and Pacheco, 2012). Regarding illegal financial outflows, for every dollar that developing countries receive in ODA, they give back about seven dollars to wealthy countries through illicit flows (Ortíz et al., 2015).

Regardless of the approach, it is essential to view funding as a critical aspect of unifying the structure and scope of government services.

Costa Rica introduced health insurance for blue-collar workers in the 1940s. The coverage expanded to include family members during the 1950s. In 1960, government debt and growing service demand led to proposals to expand payroll taxes for high-wage earners who did not mind because of the quality of public services. If Costa Rica had first launched healthcare services exclusively for poor or white-collar workers, it might have resulted in fragmented social protection like Chile and Uruguay.

To expand social policy in Chile while maintaining fiscal discipline, there was a need for increased revenue sources. Value-added taxes were relied upon to fund initiatives such as the AUGE program and earlier education reforms. Calls for improved education in 2011 and 2012 prompted a broader discussion on progressive taxation. In other national contexts, providing essential services for all can facilitate the expansion of contributory schemes (Fairfield 2015, Pribble 2013, Durán and Pacheco 2012)



Governments should regulate the use of private providers while increasing the resources available to the public. This issue should be part of the global conversation about universal social protection. Countries and policy sectors may take various approaches, such as intervening more in private benefits and fees, standardizing social guarantees between private and public providers, and taxing personal services. This can be done through user value-added tax and income tax for owners.

#### **4. Narratives matter (often more) than evidence.**

For universal social protection to succeed, policy prescriptions must be practical and compelling for policymakers as well as ordinary people.

Narratives are ideas that shape policy issues by dividing them into victims, villains, and heroes, according to Stone (2011). As Stone observes, each narrative tells a story about a problem and its seemingly straightforward solution. For example, when dealing with policy issues related to epidemics, eugenics and epidemiology proposed vastly different solutions for state policy due to their distinct approaches (Spinney, 2020). Eugenic ideas regarded impoverished workers and people as inferior beings who fell ill and died from typhus, cholera, and other crowd diseases due to vagrancy, lack of effort, and hereditary racial/ethnic weakness. Rather than improving living conditions, public health measures were typically designed to protect the wealthier population from the lower classes. On the other hand, epidemiology, which involves studying patterns, causes, and effects of viruses, portrays crowd diseases as a result of living conditions. Therefore, it aimed to improve housing, sanitation, and healthcare, making them accessible to everyone.

Today, narratives regarding macroeconomic policy play a prominent role in the type of social policy considered desirable and feasible. Austerity – often understood as strict measures to control public spending and debt - has been a powerful idea from the nineteenth century to the most recent great recession. Despite insufficient and contradictory empirical evidence, the austerity narrative was so powerful that it often led to a (problematic) reduction in public spending (Konzelmann, 2014). Regrettably, austerity ideas are rising precisely when countries more from state policy.

While recognizing the importance of struggles over narratives, policy recommendations regarding social protection need to do better at helping policymakers elaborate simple arguments regarding the importance of social protection for all. Critical are simple and persuasive arguments concerning the ideological, disputable arguments behind austerity imperatives.

Swinkels (2020) explains that ideas play a crucial role at different levels: at the individual level, they help people understand and direct their actions; at the strategic level, actors use ideas to shape political discourse; and at the societal level, ideas help maintain order and influence the actions of individuals and groups. At each level, ideas are power resources, powerful enough to create the reality that states are expected to intervene. To succeed, the case for universal social protection must resonate on all three levels.

## 5. Summary and conclusions

Due to job scarcity and climate change shocks, universal social protection is crucial for most people. The pandemic has emphasized the importance of social programs, such as cash transfers and vaccination, even for those usually detached from state services. However, progress faces significant obstacles, including the role of powerful elites and the prevalence of austerity narratives.

We recommend taking the role of ideas reflected in issue framing and policy narratives as seriously as the empirical evidence available to support the need for universal social protection. As a strategy, we stress a gradual approach to establishing universal policies, emphasizing the importance of immediate and short-term actions in creating a unified policy structure for the future. Governments should take incremental steps to reduce fragmentation across various policy areas, such as cash transfers, healthcare, education, and other sectors contributing to achieving the SDGs. New policy areas, such as Early Child Education and Care, currently dominated by private services and informal paid work, can create an opening for governments to foster universal services. Expanding these labor-intensive services is also crucial for labor incorporation.

Trajectories are country specific but always involve drawing on every single instrument available, overall, and regarding financial resources – one of the most critical matters – in particular. The range of options goes from contributory-based social insurance and targeted measures to complementary, progressive user fees. In most, if not all, cases, it is imperative to set in place standards that tame the market – a key driver behind fragmented architectures - while making efforts to unify benefits. A primary task is identifying reforms that pay off politically while avoiding fragmentation. Doing so is particularly urgent when people feel increasingly vulnerable and where participation in the labor market (often informal and poorly paid) is unlikely to deliver well-being.

Again, reducing fragmentation in the context of stagnant economies, high inequality, and austerity politics is a challenging task. One “carrot” is that almost everyone is at risk of being affected. To understand this objective risk and see social protection for everyone as the primary solution, the public must be exposed to simple stories that explain the matter. International institutions can play a crucial role.

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