Latin-American metropolises, poverty and the State in comparative and historical perspective

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Abstract

Latin American cities represent a broad field for comparative studies. Traditionally, however, the region was the subject matter for ample universalizing comparisons which used Latin American metropolises to exemplify broad processes or structures such as in development theory, dependence theory or in Marxism. But there is really something we should call Latin American city in the sense of a universalizing comparison? The development of comparisons about poverty which depart from in deep analysis of the particularities of each city and at the same time contribute to broader theoretical dialogues depends on the full consideration of the similarities and differences present in the region. This paper aims at contributing to this task by discussing the similarities and heterogeneities of Latin American metropolises, and pointing out to an agenda for future research.

I was asked to prepare a speech about urban marginality in Latin American cities, considering the general theme of the Conference. This is a real challenge, since even the idea of Latin American cities as a group to be compared must be nuanced, as least to assure that we understand the goals and the limits of our comparisons. And States are almost completely absent in the general comparisons of cities in the region. So, I decided to start by criticizing the most important existing research theories focusing poverty and social vulnerability in the region and, from elaborate that on the most important elements to be considered. I state that the production of macro-narratives to account for poverty situations (and poverty places) in Latin America has failed because of the generality of those theories, as well as due to an excessive centrality of these theories on economic processes. In my view, if we want to construct 'dense' comparative studies about cities in the region we must depart from a much more detailed, case sensitive and politically and socially centered analysis. Although some of the local debates have been contributing to this, they hadn´t reached the international scenario yet.

This presentation has three parts. In the first one I start by describing the most important existing comparative explanations for poverty in the region very briefly and discussing their strategies for comparing. These theories have departed from quite limited definitions of poverty, focused on economic processes. They have sought to produce general laws about the phenomena, which not surprisingly uncover important key differences between countries and cities. In the following session, I discuss some of these important differences and similarities among Latin American cities considering their histories and political processes, with special interest to politics and States. This discussion demonstrates the existence of intense heterogeneity in the region, which should be accounted for in explanations of poverty. Different colonial histories, processes of State formation and features of the existing Social Protection Systems produce important effects over poverty and vulnerability on these cities. These differences, however, have been underestimated by the existing theories, and their integration in comparisons is most needed. In order to contribute to this task, I elaborate in the third and final session a research agenda, pointing out to processes and elements which should be better understood about the region (and the subject) to allow us to construct comparisons based on in-between or middle level generalizations focused on common causal processes. Only the consideration of parallelisms and differences between cities can allow us to construct what Robinson (2011), following McMichael, calls 'incorporating comparison', involving the production at the same time of detailed case studies and broader causal theories. Considering my arguments and knowledge, I will focus in the largest metropolises of the largest countries in general, but in Brazil in particular.

1. Latin America in comparative perspective

Latin America had already been the subject of important and ample comparative efforts about poverty and social inequalities, at least in two different moments in the 1950s/60s and in the 1970s. Today, these theories about poverty in the region – development theory and dependency theory – are considered to be outdated, but they are still present in many of the narratives of the issue, although many times in implicit ways. An example of that are the many studies that connect directly poverty and local social conditions to certain types of capitalism or to broad transformations in the patterns of capitalist accumulation worldwide. Some recent studies, at least in Brazil, have focused on much more specific elements or mediating processes (including elements associated with politics and the State), but so far they had not reached the international sociology debates, so I will concentrate here in the international production.

The limits of these macro-narratives were not associated with their arguments as such, but with two main failures: they were too systemic, failing to capture the role of national and local processes, and they were too economicists, failing to consider the role of politics, of institutions, of political actors, their strategies and choices, as well as the different roles of nation States. The problem is still present today, especially in international debates which use cases from Latin America as illustrations. In theoretical terms, all these theories depart from a broad belief that the processes and

cases may vary, but these are variations of a single general pattern, understandable by a single explanation or law or theory (generating what Tilly (1992) called generalizing comparison). These laws or theories are usually rooted in economic processes. I would like to state that this analytical position leads to bad results and is at the heart of several problems of inference in the discussions on poverty in our cities. Let´s develop this argument in greater details.

A good point of departure is an operational definition of poverty. Here, poverty is considered to be a multidimensional state of relative absence of social and material wellbeing (Mingione, 1994) that generates a reduction of choices and, therefore, of liberty (Sen, 2000). What relative means obviously varies historically and geographically and is subject to political struggles and social interpretations (Paugam, 2005) that lead to socially accepted visions of social justice and to the establishment of rights. People might have low levels of social and material wellbeing because they cannot access wellbeing, or because they cannot maintain it. So, to understand why people are poor in a specific historical situation, we must understand how people access the different sources of social and material wellbeing, both by formal and by informal means (Mingione, 1994; Roberts, 1994). At least three sources of wellbeing must be considered in modern capitalist societies – markets, States and sociability/community (Esping Andersen, 2000; Mustered e Murie, 2007). Additionally, it is also important to notice that the access to these sources, called by some authors opportunity structures (Kaztman and Retamoso, 2005), may be facilitated or blocked by middle level structures such as social networks (Marques, 2012; Briggs, 2003) and residential segregation (Wilson, 1987; Jargowsky, 1997). So, in order to understand what causes and reproduces poverty situations (and also poverty spaces) we must consider the joint effect of these three sources, mediated by these two intervening mid-range structures.

The existing macronarratives, however, ignore these elements almost completely, focusing only on economic processes. In some of the theories, this may be explained by the intellectual mood prevalent in the 1960s and 1970s, but recent analyses continue to incur in the emphasis. I will illustrate the point by presenting the two most important existing macronarratives developed to explain poverty and inequalities were produced between the 1950s and 1970s.

The first one was development theory. As is widely known, urbanization in Latin America is a relatively recent process dating from the 1940s and 1950s. It happened in a very short period of time, mainly boosted by fast and massive migration processes from rural areas to the largest metropolis of the richest parts of the largest countries (Martine e Diniz, 1997). The difference of living conditions and opportunities in rural and urban areas created internal migration flows to cities in the periods of fast capitalist modernization that marked the region since the 1930's (Gugler and Gilbert, 1982). These flows were only in part absorbed by urban markets and by the industry. Consequently, unemployment and precarious jobs (the informal economy) became prevalent in these cities, together with a pattern of space production in poor areas marked by inequalities and precariousness. All these processes were intensely discussed by the literature since the 1970s, mobilizing at least three explanations.

At one side, several economists explained migration as caused by the wage differences between rural and urban jobs, and unemployment as a product of a mismatch between rates of urbanization and rates of industrialization. Precarious jobs would be a product of the low qualification of the migrated labor force, at the same time a cause and a consequence of the low productivity of the economy. These problems would be solved with time, since the amount of persons able to migrate would decline, reducing the wages differentials. As a consequence, urban wages would also increase, pressuring for improvements on the productivity of the economy that could save labor costs. Poverty in rural areas, therefore, would decline by the reduction of rural inhabitants, at the same time that urban poverty would decline 'naturally' after the rise of economic productivity (Costa Pinto, 1967).

These ideas were backed and paralleled by the application of modernization theories to development, especially in Latin America. Modernization theorists have suggested that development follows capitalist modernization (Rostow, 1960). The prevalence of underdevelopment during early stages of the process, therefore, would be caused by 'accomodation effects', which should fade away with time. Intense modernization paths would bring to the cities people with rural behaviors, who were detached from their rural origins, their relationships of authority and their economic activities. They would also be removed from social contexts marked by few social connections, but strong and primary ties, and were reinserted in a new urban and modern order. As a result, they would develop anomic, provincial, unsubordinated and lazy behavior, ending up as 'urban marginals'.[1] Although the argument is broader and was in fact used to design (and legitimate) US foreign policy worldwide, it was intensely used to explain the prevalence of poverty and underdevelopment in Latin America, where capitalism modernization was already in place for decades.

Development theory was intensely criticized both by Eclac economic theory (Furtado, 1964), and later by dependence theory (Cardoso and Faletto, 1977). In what concerns the discussions of urban poverty in Latin America, authors developed two complementary critiques against urban modernization and marginality debates. A first group of studies developed ethnographic analyses in Brazil, showing that the daily representations of the poor were not divergent from mainstream society, but were also organized around the idea of progress, individual work/effort and family sacrifice/savings, aiming at similar objectives as the ones of other social groups, although with different strategies considering their fewer resources and narrower life perspectives (Perlman, 1977; Durham, 1988). Similar results were found about Mexico by Lomnitz (1975) and later by Gonzales de la Rocha (2001).

In a complementary line of analysis, others departed from Marxist structural analysis to sustain that those supposedly 'marginals' were in fact functional to the peripheral capitalist economies of those countries (Kowarick, 1979). The contribution of those countries to the world capitalist division of labor was providing low paid and

[1] For an excellent critic of the marginality thesis see Perlman (1977). Interesting to notice that this culturalist (and behavioralist) explanation of urban poverty is quite similar to the "culture of poverty debate" led internationally (and in the US especially) by Charles Murray's reading of Oscar Lewis - the 'blame the victim' analytical strategy. For probably the best critic see Wilson (1987).

poorly regulated labor forces. This was only possible, however, due to the presence of a large and diversified informal economy, that maintained (alive) a large reserve industrial army, ready for mobilization at all times, pressuring down the wages in a sustainable way. The maintenance of this situation was helped by the authoritarian political regimes that characterized the region between the 1960's and the 1980's (Kowarick, 1979). Therefore, even in the moment of most intense economic growth (or exactly because of it), poverty was produced in large amounts: growth and poverty were two faces of a same coin (Camargo, 1976). This literature dialogued (from a far) with the French urban sociology school, but was produced independently of it.

In all these theories, countries and cities of the region were compared as examples of general theories associated with the variation of development (in the first case) and the similarities of capitalist development (in the second). In both cases, political processes and the State were left out of the analysis or were treated as products of macro-economic dynamics. The first research design sustained the importance of differences within the units of observation (the degree of modernization processes inside the countries) to explain why the units of observation (the countries) hadn't (yet) converged. The second mobilized the differences of processes happening between units of observation (the country's different positions in the international division of labor) to explain attributes of the units (unemployment, informal labor, poverty etc). Since then, the region was rarely thematized comparatively, although these two macronarratives continue to be present implicitly in theories which sustain the supposed affinities between national and local urbanization processes, echoing the analyses of the 1970s (Roberts, 2005; Gugler and Gilbert, 1992). Local elements, actors, conflicts, institutions and struggles tended to be treated as peripheral details, leading to conclusions about the inevitability of processes and leaving to no-room for politics.

And what other elements should be accounted for? I will depart from a strong statement, considering the theme of this speech: in strict terms, there is no Latin America, and consequently no Latin American cities, at least with the degree of unity considered by some comparative debates, although they existed as a specific cultural product during a certain period (Gorelik, 2005). There are several different countries with distinct historical, political and geographical legacies. But at the same time, there are similarities and common processes to groups of countries and cities. These are not necessarily the same processes to all, what enhances heterogeneity. In some cases, apparent similarities hide important differentiations, what helps explain parallelism. So, to account for the 'general' details (since the local details could not be address in a speech like this), I discuss in the following important differences and similarities in the region. Considering the previous focus on economic issues, I will concentrate mainly in historical and political elements.

2. Differences and similarities among Latin American cities

The region contains at the same time similarities and differences, sometimes in the same issue. This may seem contradictory, but social processes have multiple facets (and commonly contradictory facets) and very frequently several important features

lay in the details. Even when general processes point to similarities, the actions of political actors, the effects of institutions or space production dynamics may end up constructing differences. In fact, one of the major sources of the differences and similarities between cities are the processes of State formation and the formation of the Social Protection Systems, impacting welfare and poverty substantially (Mingione, 2010; Lehto, 2000). These elements influenced the formation of social classes and, consequently of political actors, as well as the construction of the institutions that regulate political conflicts and socialize wealth and wellbeing were socialized. A similar point could be made concerning the processes of space production in each city. There are several sources of differences, but I will discuss three of them here: broad historical and geographical legacies, the political sociology of State formation and urban production processes.

I start from the historical formation of Latin-America, with two colonial projects, two different languages and several ethnic and cultural heritages over a broad geographical region. The two colonial projects involved different urbanization strategies in the colonies, considering different economic goals, captured by Holanda (1995) with the use of the metaphors of the sower and the tile-layer. Portugal created few cities, mainly located at the coast, constructed with very low regulation, expect for military projects. At the interior of what is today Brazil, cities were scattered, mainly around mineral resources or by rivers which were used as transportation axis. Spain, differently, had a clear policy of territorial occupation through cities, located in the interior of the mainland. It also maintained the practice of planning its cities territorially from scratch, what led to the dissemination of specific urban features allover Latin America, such as Plazas de Armas (Morris, 1992).

Within each group, however, the differences are large. In the case of the historical Portuguese legacy over Brazilian cities, there are great internal differences. Salvador (before the 1770s) and Rio (since then) concentrated resources and people, as most important connections with the metropolis and administrative centers of the colonial government. Another important city from the very beginning of the occupation was Belém do Pará, established as stronghold of the Portuguese forces (and also Spanish actually, since the two kingdoms were unified at that time) in the first decades of the XVII century to expel the French military forces from the North of Brazil. Around these preliminary military activities, a city was formed very fast in the following decades as capital of the Nova Luzitania region, and became the gate to the Amazon region, being located at the mouth of the Amazon River.

Places such as São Paulo and Belo Horizonte, on the other hand, had almost no importance during colonial times. São Paulo was until the end of the 1700´s only a regional commercial center and the starting point of the Bandeiras, expeditions to the interior of the state and to the state of Minas Gerais to search for Indians to enslave and for gold and precious stones (diamonds and emeralds, mainly). In fact, São Paulo was so unimportant that for a period of 17 years at the first part of the XVIII century, the region which is now São Paulo was not covered by any Portuguese administrative authority, until it became a province in 1765. Belo Horizonte was a very secondary city located in a very rich region since the discovery of gold and diamonds in Ouro Preto and Diamantina, which concentrated the important administrative and political

activities in Minas Gerais. Other cities which are important and large today were created from scratch in the XX century, such as Goiânia and Brasília.

In the case of Spanish Latina America, the heterogeneity was not smaller. The history of territorial occupation was tied to the creation of the Vice-kingdoms, each with its own importance. The first one was 'New Spain', in 1535, and capital in Mexico Teochtitlan, latter Mexico City. It was very important since its start, not only because of the amount of wealth of previous mexica society, but also due to its much closer location to Spain. The second one was 'de Peru' created in 1543 with capital in Lima, which concentrated the most important flows of wealth from Peruvian silver and the monopoly of commerce with Europe until 1776. The third one was 'De la Nueva Granada' in 1550 with capital in Bogotá (Santa Fé de Bogotá). Although very old, this stayed as an unimportant region in the first centuries of the colony. The fourth and last one was 'De la Plata', established in 1776 as part of the strategy of occupying Southern territory and preventing Portugal of expanding its share of the Continent. To conquer Sacramento from the Portuguese, at the other side of the Rio de La Plata estuary, was one of the first tasks of the first vice-Roy. For those who doubt the importance of the legacy of this long term history, it is enough to observe that the four largest metropolises today in Latin America outside Brazil are the four capitals of Spanish vice-kingdoms.

The region includes in fact very different areas in geographical terms. At least three large regions must be considered. The Caribean - where Mexico City, Bogotá and Caracas are, the Altiplan - including the Andes itself, where La Paz, Quito and Santiago are, but also its coasts which host Lima, and the Low lands. The Low lands are in itself highly heterogeneous. They must also be divided in the Amazon – with Belém do Pará as main city, the Central plains - where Brasília and Goiânia are located, and several river basins that contribute to the Paraná River at the South of continent. At least two large basins must be considered - Paraná and Paraguay – where are located São Paulo, Assunción and Rosario. But the Low lands may also be divided between seashore (with Salvador, Recife, Fortaleza, Rio de Janeiro and Buenos Aires) and interior. All these geographical differences mark strongly the formation of the network of cities in each country, their growth paces and the migration flows, giving specific features to poverty and inequalities in each region.

Obviously, several micro-geographical and topographic elements have also been key for the development of the cities, such as the confinement by the Cordillera de los Andes in Lima and Santiago, and the relationship with the sea and the river in Rio de Janeiro and Buenos Aires, respectively. The urban structure of these cities throughout the XX century was influenced by these characteristics, and although the poor in all cases occupy the worst areas, these areas present very different urban and environmental features. A single comparison of El Alto in La Paz and the favelas in Rio de Janeiro is enough to make the point.

Another great source of heterogeneity in the region is associated with ethnicity. A first difference in the ethnic formation of Latin Americna cities happened with the different relationships between each State, its indigenous populations and other immigrants who would arrive in latter centuries. This is a key issue concerning the

cultural presence of Indian and peasant cultures in several places. The relative presence of indigenous population marks certain countries, such as Bolivia, Mexico and Paraguay, much more than others such as Argentina and Brazil. This is also important to characterize certain cities where their presence and culture is strong until today - La Paz, Mexico city, Quito, for example. Very commonly ethnic frontiers superpose with social class divisions. This may happen even when the presence of indigenous culture is not very strong, such as in Argentina, but where a substantial part of the poor population has indigenous origins. The physical presence of native populations may be low by different historical reasons. In Santiago, for example, it is low because the Mapuche population migrated to the South of Chile during the Spanish occupation. But in other cases this may be due to the massacre of indigenous populations, such as in Buenos Aires and the La Plata region in Argentina, or in all the major coastal Brazilian cities.

Different economic cycles were associated latter with slavery or with international migration. The presence of slavery marks differently countries and cities in economic, political, ethnic and cultural terms (Cardoso and Brignoli, 1979). Cities such as Salvador and Rio de Janeiro in Brazil and Bogotá are profoundly marked by politically and culturally afro-descendants. On the other hand, Latin America received intense international migration since the end of the XIX century, especially for agriculture, marking some countries and cities vividly such as Buenos Aires, São Paulo and Lima (Italian in first two, but also Japanese in the latter two). New international migration waves have returned since the 1990´s from the poorer countries of the region such as Bolivia and Peru in South America and Guatemala and El Salvador in Central America (these also impacted by civil wars) to cities such as São Paulo, Buenos Aires and Mexico City, respectively (Baeninger, 2012).

Therefore, the combination of social groups and populations which formed these countries and cities created strong Indian heritages in cities such as Lima, La Paz and Mexico City, and Afro-descendant heritages in cities such as Salvador, Rio de Janeiro or Bogotá, among many others. In several places, family structures differ considering the presence of these cleavages, with consequences to the characteristics of housing units and settlements, as well as to community organization and sociability. The way solidary is organized today within and between family units, as well as at the level of communities, has profound roots in these different cultural heritages, with very important consequences to poverty and survival strategies (Gonzalez de la Rocha, 2001).

By reasons which include the abovementioned historical processes, but also economic activities and State policies, different countries also created very diverse urban networks and urban scales. The cities vary substantially in size and scale. Latin America has 6 of the 29 cities which are expected to be world megacities by 2025 - although with decreasing population growth rates. The largest cities tend to be in Brazil, the only country with several cities with more than 2 million inhabitants – 12, against 4 in Mexico, 3 in Argentina and 3 in Colômbia.[2] Brazil has also the largest (São

[2] In Brazil, they are Brasília, São Paulo, Rio de Janeiro, Belo Horizonte, Porto Alegre, Salvador, Recife; Fortaleza; Curitiba; Campinas; Belém and Goiânia. In Mexico Ciudad de México, Guadalajara, Monterrey and Puebla. In Argentina, Buenos Aires, Córdoba and Rosário. In Colombia, Bogotá, Medellin and Cali. (United Nations, 2009)

Paulo with 20 million) and the fourth (Rio de Janeiro) with 12 million. At the same time, urban primacy is smaller in Brazil than in the other countries (10% for São Paulo, which is not the capital), against 32% in Argentina, 18% in Colombia and 17 % in Mexico. So, several countries of the region house very large cities, usually with high urban primacy or a small number of large cities per country, but Brazil concentrates an urban network with the largest in the region, low primacy and the largest amount of large cities.

A second group of characteristics involves political and institutional processes. State formation, State design (unitary or federalist) as well as State policies (broader or more restrict social protection systems), the way political rights were granted and the way local government was organized, all influence differently countries and cities. At least three large historical parallelisms are present. Each of them, however, hides important differences which mark the countries and their cities.

A first moment included the transitions from colonial rule to independence. Although there were important differences in economic activities, territorial occupation and political importance of the different parts of Latin America in colonial times, Independence came as a result of the incapacity of the Spanish metropolis to sustain its colonies after Napoleon invasion. Spanish Latin America generated a set of independent republics and some of them were subdivided latter (such as Colombia, Venezuela, Ecuador and Panamá, which split some decades after Independence). In all cases, these processes happened with relatively low presence of liberal ideas and with the strong political presence of rural landlords, what marked the processes of nation State formation in several countries. Spanish Latin America became independent in some moment between 1810 and 1830.[3]

The Brazilian case is similar in the moment and in the historical process which generated Independence – the Napoleon Wars. But it happened differently, since the royal family crossed the Atlantic in 1806, turning Brazil the only known example of a colony which becomes the metropolis of the kingdom from one time to another. The importance of this difference path considering the rest of Latin American is considerable, since this halted the installation of a Republic, but helped substantially to prevent the desegregation of the vast territory of the Portuguese colony. But the presence of the royal family only postponed Independence itself for some years. The Portuguese courts challenged the king, negotiating the end of the absolutist rule, what led to the separation of the kingdom and the creation of the Brazilian Empire in 1822, with the son of the Portuguese king as the first Emperor. The Emperor ruled absolute until 1832. This year starts Constitutional power in Brazil, but even after that, the emperor maintained strong control over the political system due to the peculiar Brazilian imperial institution of the Moderating power – the emperor had the power to

[3] Independence came to Argentina in 1816 (Saint Martin); Chile in 1818 (O´Higgins e San Martin); Colombia/Venezuela/Ecuador/Panamá in 1819 (Venezuela and Ecuador became separated countries in 1830, with Bolivar's death); Peru in 1820; Bolivia in 1809, but consolidated in 1825; Mexico in 1821; Paraguay in 1811; Uruguay in 1810 (from Spain) and 1828 (from Brazil and Argentina).

review all laws and administrative decisions taken by the other three powers (this was established by the Constitution as a forth power). The Republic would come only in 1889 (and the end of slavery in 1888), again with low presence of liberal ideas and with strong political presence of landowners. Obviously, all these elements mark political and social rights in the country, as well as the format of citizenship constructed through the process of State formation in the subsequent period.

The second and crucial moment concerns economic modernization and State formation in the first decades of the XX century. Several Latin American cities had already been 'modernized' territorially since the end of the XIX century by urban reforms dedicated to their transformation into bourgeois cities, following the examples of Haussman's Paris and Wagner's Vienna (Romero, 2004). But although these reforms changed substantially the urban tissue of cities such as Rio de Janeiro, Buenos Aires and Montevideo (especially at their centers), they were more associated with the image urban elites wanted to disseminate, than with economic modernization as such. Industrialization came only in very incipient forms until World War I and the Wall Street crash in 1929, making both capitalists and working class very rare and weak political actors. Rural elites, in contrast, were the most important economic and political actors, and only in some countries (Mexico during the its revolution is the best example), peasants were important politically in the first decades of the XX century. So, even when urbanization was already present, until the 1930s, almost all the region was characterized by weak civil societies, oligarquic political structures, low political participation, descentralization of political authority (since local elites were strong) and poor development of State structures and policies. Even in countries which experienced economic wealth at the end of the XIX century, producing some early redistribution and achieving good living standards in the first decades of the XX century such as Argentina, Uruguay and Chile, the production of rural commodities for export was the most important economy activity.

Economic modernization in the region started (for the ones which experienced it) in the 1930 and 1940 with strong presence of the State, not only as direct producer of intermediary goods (oil and gas, steal, energy, cement) and infra-structures, but also as the political conductor of the processes. In all cases, States implemented strategies of industrialization by substitution of imports. The best succeed cases (Brazil, Argentina and Mexico) managed to create relatively diversified industrial sectors and relatively capable State structures. Even among theses coutries, however, in some cases the political strength of the agricultural elites has made industrialization less generalized and more incomplete and reduced State stability, such as in Argentina (Sikkink, 1993), especially during the military period (Torrado, 2010), enhancing heterogeneity. In other cases, rural elites were included peripherally in the political agreements which sustained modernization processes, boosting industrialization and capitalist modernization in certain parts of the country, but maintaining other regions under the old forms of political control and economic development, such as in Brazil (Draibe, 1985; Souza, 1976).

In some countries, social policies, labor legislation, and social rights were granted by the State under authoritarian regimes. The most important examples happened in Brazil under Vargas government (1930-45), in Mexico under Lazaro Cardenas (1934-40,

implementing the 'social' features of the Mexican revolution and of the Constitution of 1917) and in Argentina with Perón (1940-55). This marked these countries' civil societies and polities (political and civil rights) and social protection systems (social rights), although with very important differences within the group. All these three cases involved the formation of Statist corporatist structures, but in the Mexican case this was constructed in close association with the hegemonic party, with consequences to urban associations (Davis, 1994) and generating long term consequences in terms of civil society control by the party and the State (Gurza La Valle and Bueno, 2011). In Argentina, this corporatist system marked the party system itself, and still today structures the most important party cleavages around Peronistas and anti-Peronistas, although obviously translated into nowadays terms (McGuire, 1995). In the Brazilian case, the most important legacy of the period was associated with State design and administrative capacities, considering the centrality of State building in that authoritarian regime although with the continuing presence of other political grammars (Nunes, 1997).

The formation of the Latin American Social Protection Systems in the two largest countries – Brazil and Mexico - involved the selective granting of rights (under authoritarian regimes) subordinated to the positions of the individuals in the occupational structure, leading to a kind of citizenship regulated by the State considering occupations (Santos, 1979). In these cases, social rights were granted before the full acquisition of civil and political rights, inverting the classical order proposed by Marshall (1950) and leading to what Carvalho (2001) has called 'Stateship' instead of citizenship. The Southern cone – Argentina, Uruguay and Chile, presented a kind of stratified universalism until the 1970, marked by more inclusive policies, at least in health, social security and labor legislation (Franzoni, 2008).

The third and most recent moment of parallelism concerns the authoritarian governments and the return to democracy, in more recent period. Although the history of democracy is not very long in the region as a whole, the majority of the largest and most important countries experienced authoritarian regimes between the 1960s and the 1980s.[4]

Some of these governments – Brazil and Mexico being the most prominent – intensified import substitution policies and conservative modernization. During this period, urbanization and metropolization got to its peak, creating the Latin American metropolises we see nowadays. Therefore, fast urbanization, intense migration and proletarization happened under authoritarian political conditions, with civil and political rights suspended or seriously hampered (with repressed social movements and not free or noncompetitive elections). Social rights were granted by the State in a very selective way, as we already mentioned.

[4] The list of coups d'état is long – Brazil (1930, 1937, almost in 1954, almost again in 1963 and finally in 1964), Argentina (1930, 1943, 1955, 1962, 1966, 1970 and 1976), Uruguay (1933, 1973), Chile (1932, 1973), Peru (1929, 1948, 1968 e 1975), Paraguay (1954, Strossner stays until 1989), Bolivia (1970 and again 1980), Venezuela (1945, 1992), Equador (1963, 1976). The only important country with no coup d'état – Mexico – experienced the longest de facto authoritarian regime (from the 1920's to the 1990's), since the PRI (former PRN) occupied the presidency since its creation in 1929. The choice of the PRI's candidate, inside the organization – the 'destape', was the only really important political competition for 70 years.

The presence of right-wing authoritarian regimes, however, did not define what kind of economic modernization was introduced, generating more heterogeneity. In Argentina and Chile, for example, countries which had already experienced economic prosperity at the first decades of the XX century due to their agricultural sectors, the strength of the rural elites reduced the centrality of industrialization, weakening the formation of a complete and connected industrial sector. In the case of Argentina, the economic strategy of the military governments was in many senses inconsistent and led the country to the reduction of its industrial sector (Torrado, 2010). In the case of Chile, the legacy of Pinochet period was an economy specialized on expensive agricultural products and mineral commodities. These differences obviously impact social structure and social conditions in each country presently, as well as poverty and inequalities.

A last moment of historical parallelism dates form the 1980s and 1990s, when all those countries transited back to democracy, introducing elections, new social actors and turning the political and economic redistributive games more complex and inclusive. Social inclusion in a broader sense, after decades of increasing social inequalities under authoritarian governments, and more specifically the fight against urban poverty, housing precarity and the provision of social services (including urban equipments and policies) has been seriously impacted by these processes of return to democracy.

Several transformations were introduced in the Latin American Social Protection Systems with different degrees of decentralization, participation (including institutionalized participation), privatization and the growth of the third sector. The different combinations of these elements between countries, however, are very important to understand what has been happening with the provision of welfare by the State. In some countries, the reforms of the 1980s and 1990s had clear neoliberal designs, being Chile the most prominent case (in the world) under the Pinochet regime. Peru, Bolivia and Argentina, especially under Menen, also included privatization and neoliberal instruments, particularly in their pension systems (Mesa-Lago, 2000).

Brazil went in the opposite direction, strengthening a significant part of its health and education federal systems and reforming its pension system only ‘parametrically’. More recently, the area of housing was also restructured and improved with the creation of the Ministry of Cities, the introduction of several institutional and policy developments and major federal investments (Marques, 2011), although with incongruences between the institutional improvements and the investments, and still with very low insulation from political interests (Rolnik, 2011). The area of social assistance has been intensely reorganized with the creation of the Bolsa Família Program (the largest CCT program in the world, now), a federal system of social assistance under construction (the SUAS) and a network of social assistance equipment, although still in its first steps. In all of these cases, more than just decentralization, the recent period hosted the reconstruction of the federalist pact, with the centralization of decision capacities at the federal government, and the decentralization of implementation capacities to local governments (Arretche, 2012).

In all those cases, the access to policies and services has been improving, especially among the poorer (Figueiredo at al, 2006), but very important differences of quality are still present or are even increasing. As a whole, poverty has been declining in urban areas continuously and monotonically for the last 15 years (Barros, 2007), as will be discussed comparatively in the next session.

The single social process in evident and alarming increase is urban violence (Feltran, 2012; Misse, 2007 and 2011), with important consequences to urban segregation (Caldeira, 2000). Therefore, the recent direction in the Brazilian case has been of State capacity building, considering the universalization of social rights, except in the urban policies and violence, turning contradictory the process of citizenship construction (Marques, 2011). The quality of social policies, however, remains as a major problem.

Therefore, the recent period of democratization enhanced accountability and enlarged political participation in Latin America. This coincided with the moment of dissemination of neoliberal ideas internationally. However, their appropriation locally differed from place to place, with obvious consequences over poverty conditions. These should be accounted for in comparisons in the region.

A third group of elements which produce similarities and differences includes urban structure, peripheries and urban precarity. In general, Latin American cities are marked by strong segregation, with the richer social groups located at the central areas (where the scarce equipments and policies were, since the beginning of the urbanization), while the poor and recently migrated population lived in vast, homogenous and segregated peripheries (Preteceille and Cardoso, 2008; Sabatini et al. 2005; Dureau and Vanegas, 2000; Joseph, 2009; Marcos 2010; Marques, and Torres, 2005). The resulted urban form is inverted in relation to the US model of metropolization, where classically central areas hosted poor populations in decaying areas and suburbs housed the middle classes.

These peripheries were marked in the 1970s by the absence of infra-structure, concentrated in upper class areas, by precarious and irregular settlements (Bonduki and Rolnik, 1982) as well as by favelas, while the urban location of these latter could also constitute enclaves of poverty in more central areas. All of these would be self-built in collective processes by the own inhabitants during their free time. This urbanization pattern would submit the working population to a kind of exploitation derived from urban space in what Kowarick (1979) have called ‘urban spoliation’. All those places were associated with negative cultural labels by more affluent groups and experienced territorial stigmas, since the 1970s, impacting their social integration more generally and also labor market participation (Kowarick, 1979). The State classically reinforced segregation by constructing large scale housing projects in extreme peripheries (Maricato, 1987; Sabatini et al., 2005). In recent decades, peripheries in Brazilian cities are becoming more heterogenous due to the presence of high income gated communities (Caldeira, 2000), but also because of the increasing presence of State investments infra-structure.

The provision of State services varies considerably and, while cities such as Buenos Aires, Santiago and São Paulo present relatively high levels of basic services even in far and degraded poor areas, services tend to be much more scares in cities such as Lima. This varies also within countries, something that becomes clear in a comparison of services between São Paulo and Belém do Pará, for example. Recently there has been a trend towards the formation of territorial enclaves for the rich, in several cities, both in central areas and at the peripheries (Caldeira, 2000; Salcedo and Torres, 2004; Duren, 2006).

Another common feature is urban precarity in slums and several types of precarious and irregular settlements. According to UN estimates, the region has 23.5% of its population living in irregular or precarious settlements. Although very high, this figure is lower than the average of developing regions (32.7%) in 2010, and is declining – it was 34% in 1990 and 29.2% in 2000 (United Nations, 2009). The presence of precarity tends to vary substantially between cities, or even within countries. In Brazil, for example, while the most famous precarious areas are in Rio de Janeiro, and the largest population in these settlements lives in São Paulo, the highest proportions of precarity are found in the largest metropolises of the North and North-East of the country - Fortaleza, Belém do Pará and Recife.

In terms of housing, basically three precarious housing solutions were developed by the population: tenements (cortiços), favelas and irregular settlements. The importance of the distinctions between these precarious housing solutions is not only in the fact that they present different consequences in terms of housing and environmental precarity, but also that their solution is associated with very different public policies (Marques and Torres, 2005). Tenements involve rented rooms in collective buildings, where kitchens, bathrooms and laundry areas are shared by families, and present the worse sanitary and sociability situations nowadays, on average. Favelas are occupied areas which usually lack infra-structure and have irregular patterns of physical occupation. What defines them, however, is the lack of land property. Irregular and clandestine settlements, finally, have been produced by private entrepreneurs who did not complete their legalization, hampering the legal division of the plots and the issuing of separate land titles for each family. In several cases nowadays, these precarious solutions are mixed.[5] The presence of these different precarious solutions tends to vary intensely in the largest cities of the region. Tenements were the most important precarious solution at the first decades of the XX century, are still present in Brazilian metropolis, and tend to present the worst housing and sanitary conditions. In the majority of cities they tend to represent a minority among the precarious solutions today. In some cities, favelas and irregular settlements are equally important, such as in Rio de Janeiro, while in São Paulo irregular settlements tend to be more present in relative terms.

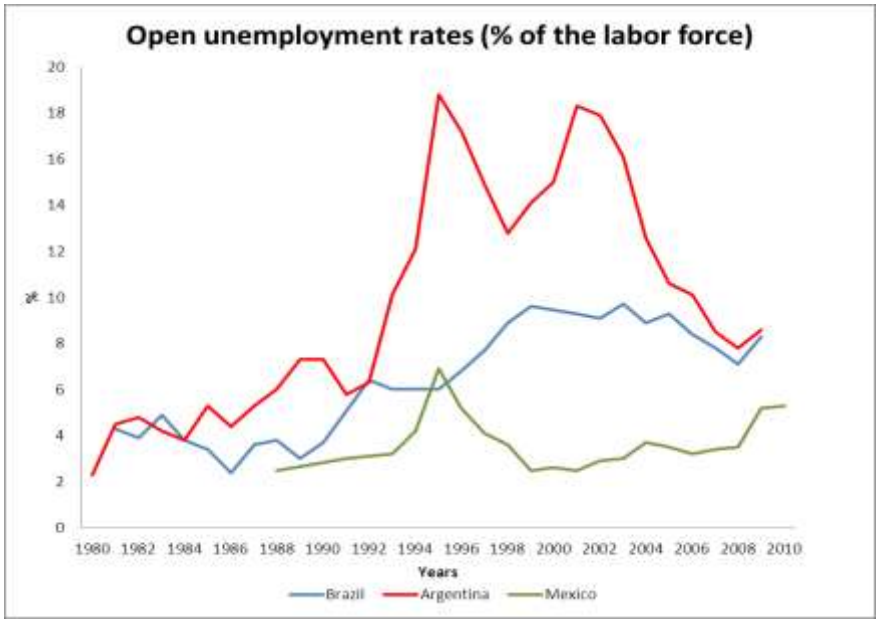
[5] For an excellent recent ethnographic reference of living conditions in these precarious solutions in São Paulo today see Kowarick (2009).

3. Instead of concluding: which agenda should be incorporated?

Therefore, the production of empirically grounded comparisons between cities at the region might not leave aside social and political processes, as well as the role of political institutions. And, since poverty and social vulnerability are produced by different configurations of access to markets, States and sociability/community, taking into account segregation and networks, a minimum knowledge of the variability of these elements must be present in any solid comparison.

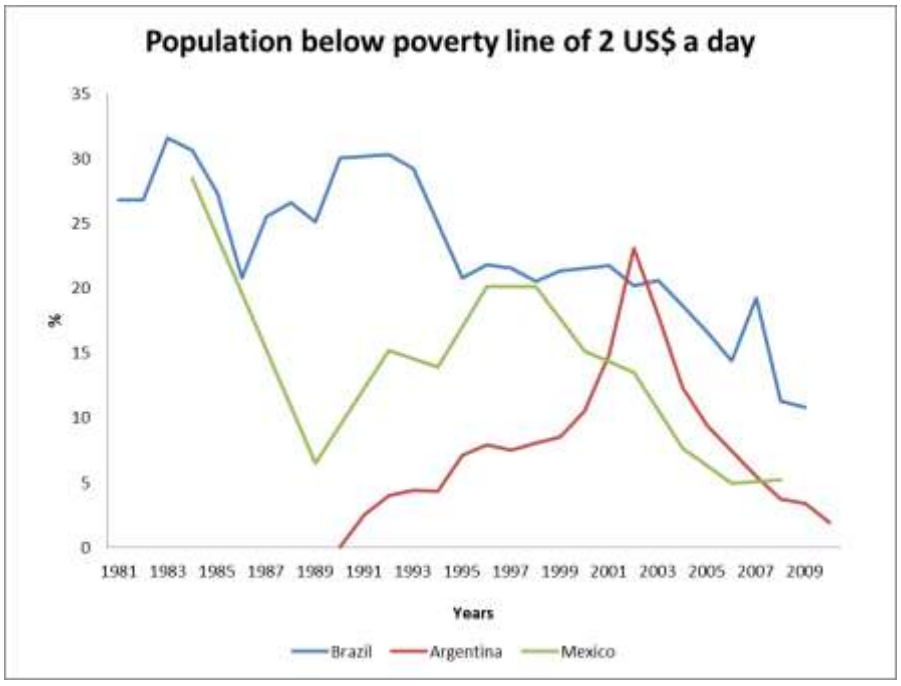
Among these elements, we know the dynamics around markets much better, since they were at the center of the already mentioned theories, as well as at the focus of substantial scrutiny from economists in more recent years. In certain analysis of the region, however, it has been considered that the general frames of economic restructuring and neoliberalism are enough to express what happened in the economy and governments have been doing about it. Although it is clear that the opening of the economies in the last 10 or 20 years led to intense economic restructuring, this had very different concrete consequences in different countries, considering their productive structures, as well as the strategies governments implemented. Any grounded comparison should account for these differences.

Only to illustrate the point, it is enough to observe the recent changes on unemployment and poverty (considering income) in the largest economies of the region - Argentina, Brazil and Mexico between 1981 and 2010 (Graphs below). Unemployment started very similar at the beginning of the 1980s, but changed substantially, following very different trajectories ever since. In Argentina, the unemployment rate increased and decreased very intensely, while in Brazil it went through the same trajectory, but with much smaller variation, although at the end of the period both countries presented the same rate. In Mexico, the rates tended to be much smaller, although increasing around 1995 at the end of the 2000 decade.



Source: World Development Indicators, World Bank.

The differences of the tendencies in poverty are even greater. Argentina started from very low rates, but increased substantially until 2002, year that marked a substantial swift in economic policies with the end of the convertibility following a long political and economic crisis. Both Brazil and Mexico experienced rises in poverty rates in the second part of the 1980s, but in both countries the rates fell almost continuously ever since.



Source: World Development Indicators, World Bank.

On the other hand, it is also well known what States have been doing in terms of social policies and how these have impacted poverty and social conditions in Latin America. The literature on public policies has produced an extensive analysis, both of each country and of the region comparatively, but they had not reached the urban studies debates. In great part, State actions in the region are discussed within urban studies debates under the general rubric of neoliberalism, which simplify and homogenize a broad field marked much more by differences than by similarities, both between countries and between policy sectors. Let´s take Brazil as an example.

Neoliberal ideas arrived late In Brazil – at the beginning of the 1990s, and became important in economic policies, as has already been largely discussed. The core of social policies – education, health and social assistance – however, received a neoliberal approach only in the Collor government. The two longest and most important administrations of the period – Cardoso and Lula – have in fact several similarities on the treatment of social policies, and there were clear processes of policy learning between the two governments within each policy sector in the constitution of

federal policy systems – SUS, Fundef/Fundeb and SUAS. Due to that, policy coverages have been increasing, although with large problems of quality. (Anderson, 2011)

In this same period, urban policies were treated with a clear neoliberal tone during the Collor (1990-92) Franco (1992-94) and Cardoso administrations (1995-2002), but received an opposite treatment ever since. During the first governments, including Cardoso, the presence of the federal government in housing, sanitation, transportation and urban infra-structure was substantially reduced, and the existing local public agencies were forced to restructure, close or being privatized by the federal government. During the Lula period, the federal government returned strongly to the regulation and financing of the sector, and several new agencies, laws and institutions were created to organize the decision making process at the federal level, including spheres of ample social participation such as National conferences. The housing sector received the largest amount of resources within two decades (through the Minha Casa Minha Vida Program), with the inclusion for the first time of explicit subsidy for the poorer, using resources directly from the public treasure.

So, comparisons about poverty among cities in the region must incorporate the existing analysis of the subject, in order to unfold general categories such as neoliberalism and capture the differences between countries and policies that help to understand the diversity of poverty situations in Latin America.

The third source of welfare – solidarity/sociability – is for sure the less known of the three sources of welfare. It is true that the issue has also been the subject of several analyses by studies of civil society, social movements and poor neighborhoods. But it is not clear what are the main features of sociability in Latin American cites (and how they vary) and what are its effects over poverty. Regardless of that, there is a quite substantial production on the importance of specific elements, such as collective actions or family/community solidarity, for the reduction of poverty and its mitigation trough survival strategies (Roberts, 1994; Lomnitz, 1975; Mercedes de la Rocha, 2001). Elements such as sociability in itself and social networks, however, were scarcely analyzed, so far. At least three themes should be highlighted concerning social solidarity – family and the demography of the poor, civil society and associations, and social networks and sociability.

The demography of the poor have been changing substantially in recent decades. Migration and growth rates are declining in all countries of the region, and among the largest cities only Lima continues to present high population growth rates. The same kind of dynamics is also present in fecundity rates, except for Bolivia, among the largest countries. (United Nations, 2009) On the other hand, in several countries, family arrangements are also changing, with the decrease of married couples with children and the increase of all other family arrangements, although with some differences between countries.[6]

[6] In general terms, the demographic scenario of the region indicates several countries well advanced in the demographic transition process, such as Argentina, Chile and Uruguay, some countries almost in the same position,

Regarding civil society, many things happened in Latin America since the return to democracy, although this varied strongly from country to country. In some cases, such as Mexico, the corporatist structures created in the 1940s are still relevant, although with declining power (Gurza La Valle and Bueno, 2011). In Brazil, in contrast, the intense social movement mobilization of the 1980s was reduced, but a quite intense level of civil society activism was established since the consolidation of democracy through the formation of a very heterogeneous field of civil society organization. One of the dimensions of the phenomenon involves the reform of public policy sectors, which created many new arenas of participation. In analytical terms, it seems increasingly important to abandon theoretical models based on 'authonomy' and focus on the linkages (or on fit, as suggested by the neoinstitutionalist literature) between activism and the State (Tatagiba, 2011). The important of fit between institutions and collective actions is also present in Bolivia, where institutions created by neoliberal policies ended up boosting participation from below, something which changed government substantially in unexpected ways (Kohl and Farthing, 2008).

The third facet of social solidarity involves sociability in itself and the structure of social relations, conforming social networks. Networks also represent very relevant mid-level structures that mediate the access to all sources of welfare. Their importance in the production of poverty is well established by the international literature (Wilson, 1987; Briggs, 2005; Mustered and Murie, 2007), but we still know very little about the relational settings that surround the poor in Latin American cities, both considering networks metaphorically or methodologically. This is somewhat contradictory, since the long tradition of studies on peripheries, favelas and irregular settlements has cited sociability extensively, but they did not discuss it precisely, nor specified exactly the elements under consideration. The few existing studies on the subject (Lomnitz, 1975; Gonzalez de la Rocha, 1986; Marques, 2012; Guimarães, et al., 2012) confirm the importance of networks for poverty, but suggest the presence of intense heterogeneity, indicating the urgency of further researches, especially in other cities. While the role of kinship ties is better known, the importance of other spheres of sociability, as well as the effects of the variation of networks, are almost completely unknown.

Therefore, while in the case of sociability practices and networks new studies are most needed, in what concerns demographic changes, family dynamics and civil society investigations, comparative studies of poverty in Latin America must incorporate what the literature has already produced about this third source of welfare.

The last important element concerns segregation structures. This is also a subject in which the literature has accumulated substantial knowledge since the 1970, although not necessarily with comparable methods. We do know that Latin American cities tend to be highly segregated in terms of social structures, income and in some cases ethnic attributes (Preteceille and Cardoso, 2008; Sabatini et al. 2005; Dureau and Vanegas,

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such as Brazil, Mexico and Peru. At the beginning of the demographic transition process are only Bolivia and some smaller Caribbean countries (Guzmán et alli, 2006)

2000; Joseph, 2009; Marcos 2010; Marques and Torres, 2005). We are much less certain, however, about the effects of these patterns in different cities, especially considering the mediation of segregation in the access to States and markets. Another important subject that deserves better attention is the joint effect of segregation and networks in different urban contexts (Marques, 2012). In all these cases, the development of comparative analysis of segregation in Latin American cities could contribute to the production of better comparisons of poverty in the region.

Therefore, the development of comparative analysis of poverty in Latin American cities should depart from empirically grounded research which could account for the differences on the three sources of welfare, as well as to the various configurations of social networks and segregation in each city. The existing comparisons focus excessively on economic processes and on markets. On the other hand, the urban studies literature has developed several analyses about residential segregation and on the production of space in each city, which are for sure key for the understanding of the phenomena all over the region. These could be integrated into the existing debates on markets, on States and social policies, as well as on civil society and on the family/demography. Probably the missing link on the studies of poverty in the region is a better knowledge about the sociability and social networks. Considering the mediating role of sociability, however, a more systematic knowledge on the subject could help to integrate all these elements in each city, providing interpretations about the poor that could lead to broader understandings about poverty, not only in each city, but in Latin America comparatively.

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