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Recent Trends in Inequality and Exclusion in Latin America

Editor

Maria Amparo Cruz Saco

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Editorial

Inequality and Exclusion in Latin America: Health Care Commodification, Gendered Norms, and Violence

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Abstract
Since the early 1990s, a market-orientated policymaking in Latin American countries did nothing to secure decent and productive jobs or eliminate gender inequities. It served, rather, to limit social investments that were needed to increase wellbeing, social cohesion, and, eventually, productivity. The pioneering scholarly work of the authors in this thematic issue, using either qualitative or quantitative methodologies, deepens our interdisciplinary understanding of the causes and dynamics of inequality and exclusion in these countries. Contributions are organized in three dimensions: (a) the commodification of health care, (b) gendered social norms, and (c) fragile life and violence. Based on our authors' findings and suggestions, an agenda for change emerges that emphasizes autonomy from external pressures, community action and representation, eradication of the patriarchy, and expansion of social protection programs.

Keywords
Chile; feminism; gender income gap; Guatemala; health care privatization; inequality; Latin America; old age; Peru; South-South migration

Issue
This editorial is part of the issue "Recent Trends in Inequality and Exclusion in Latin America" edited by Maria Amparo Cruz Saco (Connecticut College / Universidad del Pacífico).

1. Introduction: Inequality and Exclusion

Inequality and exclusion in Latin America trace back to a three-century-long colonial rule, when foreign control of natural resources and sociopolitical domination denied the redistribution of economic growth gains through public and social policies. Since Latin America's political independence in the 19th century, income, opportunities, and property have continued to be largely concentrated in the hands of interest groups. With few exceptions, a string of development strategies across countries failed to ensure the social integration of left-out communities. In the last three decades, neoliberal policies—central to financial integration and globalization—promoted the institutional modernization of Latin American societies (admittedly, their value added was pulled significantly by China's growth and demand for commodities). But regionally, the economic and social progress was mixed. While nominal poverty—measured by the proportion of people under a per capita poverty threshold—decreased (until the onset of the Covid pandemic), inequality surged and the middle class compressed.

Social dissatisfaction grew in view of the missed opportunities to increase living standards and the excessive vulnerability of large communities left behind. A market-orientated policymaking since the early 1990s did not secure decent and productive jobs or eliminate gender inequities but did serve to limit social investments that were needed to increase wellbeing, social cohesion, and, eventually, productivity. Thus, political movements and perspectives that challenge minimalist social policies have resurged. In many instances, elected governments re-reformed social protection or enacted new programs that provide universal benefits to traditionally marginalized populations: a new consensus.

A salient example of the rejuvenated political commitment to increased equality and social integration through an institutional transformation is the Chilean Constitutional Convention. Although the writing of the new Constitution is a work-in-progress at the moment, the eyes of Latin American countries are fixed on this opportunity to change the neoliberal model towards more equality and social integration.

Social exclusion has many faces: the fragile livelihood of unregistered workers with precarious jobs; the discrimination of girls and women; farmers who survive without support; marginalization of indigenous communities; criminalized migrants; forgotten older persons; persons with disabilities whose fate is indifferent to many. To nobody's surprise when the Covid pandemic hit, a large number of communities in Latin America were ill-equipped to mitigate contagion and mortality rates (number of deaths over confirmed cases). The latter was 8.8% (202,741 deaths) in Peru and 7.5% (299,525 deaths) in Mexico respectively. Brazil, with a mortality rate of 2.8% and 619,401 deaths ranks second after the USA in terms of deaths, 826,060 (the mortality rate in the USA is 1.5%; see John Hopkins University of Medicine, 2021).

This thematic issue presents the pioneering scholarly work of authors who use qualitative or quantitative methodologies to deepen our interdisciplinary understanding of the causes and dynamics of inequality. The six articles focus on three inequality dimensions: The first of these is the "commodification of health care" proposed by the World Bank (WB) as part of its lending conditionalities consistent with globalization recommendations that Latin American countries reduce the scope of government to attain fiscal balance. De Carvalho (2021) analyzes the role of the WB in shaping health care reform legislation in five Latin American countries. The second dimension refers to "gendered social norms" that discriminate against girls and women. Three articles delve into the question of patriarchy, gender inequity, and activism. Vaccaro et al. (2021) analyze the gender labor income gap among working-age Peruvians. Cruz Saco et al. (2021) asses the labor income gap among persons 60 years and older, who remain active in the Peruvian labor force. Finally, Perry and Borzutzky (2021) study the Chilean women's movement and its role in the Constitutional Convention to draft a new political constitution that can help move toward more equality and gender equity. The third dimension is "fragile lifestyles and violence." The articles by Quesada (2021) and Pérez and Freier (2021) study how the absence of social policies, decent employment opportunities, and safety nets create the structural disempowerment of residents in Guatemalan marginalized communities and of Venezuelan migrants in Peru respectively.

2. Commodification of Health Care

In the 1990s, international financial institutions—e.g., the InterAmerican Development Bank, the International Monetary Fund, and the WB—played leading roles in influencing the globalization and marketization pathways of Latin America. Through lending and technical support, Latin American policymakers adopted economic liberalization measures that furthered trade, foreign investment, and new social protection schemes. The market-oriented paradigm revamped institutional frameworks through the passing of statutes that affected government responsibilities and transferred the provision of services to the for-profit private sector. Using content analysis (NVivo) of health care reform legislation in five Latin American countries (Argentina, Bolivia, Colombia, Paraguay, and Peru) over 1993–2000, de Carvalho (2021) assesses the impact of the WB's flagship *World Development Report: Investing in Health* (WB, 1993) on the five national welfare systems. The main finding is that national governments in the selected countries adopted WB recommendations to reduce the coverage and cost of publicly provided services with a focus on vulnerable groups. Low- and middle-income countries in the sample (Bolivia, Colombia, and Peru) had a higher degree of adherence to WB dictums which can be related to weaker negotiation capability and higher dependence on external funding. De Carvalho provides evidence on the impact of the WBs prescriptive ability in affecting social protection arrangements, health care in particular. This research raises important questions on how national policymakers negotiated external pressures toward financial and trade liberalization and the provision of social services that were believed to sustain economic growth and wellbeing.

3. Gendered Social Norms

Like many other Latin American countries, Chile and Peru are societies characterized by patriarchal structures that inhibit the attainment of gender equity and hinder women's full participation in the labor market. Despite major progress in the educational attainment of women in both countries, gendered norms are resilient. The situation for girls and women is worse than the acknowledgment of traditional caregiving roles in the family or work compensation. In Peru, for example, the incidence of femicides has increased, becoming a public danger that threatens the core of society.

In their study, Vaccaro et al. (2021) conduct a thorough investigation of the evolution of the Peruvian gender wage gap over 2007–2018. Using the Oaxaca-Blinder decomposition method and a Mincer type wage equation, the authors conclude that an unexplained gender gap in favor of men has remained stable over the period of analysis. This gender gap can't be explained by observed variables and therefore structural barriers—social norms, gender stereotyping, and discrimination—are impediments to attaining the same pay for equal work. The study finds that level of education does play an equalizing impact on the income gender gap, however, it operates mostly among more educated women.

In contrast, the incidence of the unexplained gender gap is higher among the poorest women who are usually less educated and work as unregistered workers. Vaccaro et al. (2021) suggest that measures to support the full participation of women in the labor market should include their continuous training and education, in particular among low-income women. In addition, they suggest the creation of a national social protection that includes subsidized or free daycare for small children.

In several Latin American countries, coverage of pensions systems is low; often, even when there is coverage through a contributory or social pension, the pension is insufficient. As a result, older persons continue to participate in the labor market. As documented by Cruz Saco et al. (2021), more than half of Peruvian older persons (60 years of age and older) remain in the labor force. Their article uses the Oaxaca-Blinder decomposition to assess the labor income gap of older persons who work. The main finding of this article is that institutional patterns and value systems perpetuate female discrimination in the labor force and during old age, thus expanding the findings in Vaccaro et al. (2021) for working-age workers to older persons. The income gender gap is stronger among low-income and rural women. One suggested intervention is the increase of social pensions to reach universal coverage with transfers that are livable. Secondly, pension programs should adopt compensation mechanisms for women who stop contributing when they give birth or take on caregiving at home. Finally, governments should provide effective health care services and adequate housing with care options for older persons.

The October 2019 social protest in Chile and the creation of the Constitutional Convention are an opportunity for the transformation of the legal basis to fight against or end gender inequality and violence. Perry and Borzutzky (2021) argue that the 1980 Constitution prevented reductions of inequality and limited opportunity for impactful democratic participation. The massive protests were rooted in the "various inequalities Chileans experienced in education, health, gender-based violence, work, and pensions" (p. 54) and on Chile's feminist movement that protested the patriarchal system and "the precarity of life, that is, the violence and vulnerability that is promoted by Chile's neoliberal political and economic system" (p. 53). Representation of women in the Constitutional Convention (50% of the elected officials) is a success for the feminist movement whose reach is transnational and whose work is closely followed elsewhere in Latin America.

4. Fragile Life and Violence

Quesada (2021) analyzes living conditions in two marginalized communities in the ravines of Guatemala City. Residents are poor and engage in income-generating occupations in a context of enormous violence and gang activity, environmental risks, and lack of proper services. Gender-based violence is rampant and exacerbates the painful disempowerment of families and human rights violations. The atrocious vulnerabilities in poor urban communities in Guatemala and throughout Latin America are testament to weak or absent interventions and/or community-based corrective actions. In this well-documented qualitative research, Quesada (2021, p. 69) asserts that a clear understanding of the causes, dynamics, and manifestations of urban violence and exclusion in poor marginalized communities is needed:

> Deciphering these processes helps to ground the search for spatial justice and shine a light on the urgent need for better access to democratic rights in the city, as well as the need to promote more inclusive urban planning practices. Even if spatial injustice has been historically and socially produced, it can and must be changed.

An examination of Venezuelan migrants' responses to claims of criminalization in Peru contributes a useful analytical framework and provides evidence on the intersectionality of class, gender, and race in south-south migration corridors. Pérez and Freier (2021) argue that Venezuelans devised the use of satire and intra-group boundary-making to cope with such claims. Most migrants who participated in the labor market did so as unregistered (informal) workers thus competing with Peruvian workers and Venezuelan late-comers who also try to find a space for themselves. To protect their employability and social integration, Venezuelan migrants established differences between themselves and late-comers. Hence, their coping strategies were indispensable to remain employed.

5. Conclusion

The scholarly contributions in this thematic issue provide unambiguous evidence about the extent of inequality and exclusion in Latin America. This is a fundamental step for corrective actions to address policy failures. Contributing authors have assembled an agenda for change. National policymakers should be autonomous of external pressures. Consideration should be given to legislation, policies, and programs to attain equality and gender equity. Patriarchy structures and traditional allocation of roles by age, class, ethnicity, gender, or any other marker must be eradicated. Girls and women should be supported throughout their lifespan to prevent inequity due to maternity or caregiving jobs at home. Their full participation in the labor market should be ensured through training and the elimination of stereotypes. Universal basic social services and other social protection coverage should be enacted as a human right. Students, workers' organizations, and other collective representations should actively participate in the political life of their communities to ensure social integration.

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Conflict of Interests

The author declares no conflict of interests.

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Article

The World Bank and Healthcare Reforms: A Cross-National Analysis of Policy Prescriptions in South America

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Abstract
Recent literature on comparative welfare states has recognised the central role international financial institutions (IFIs) play in shaping social policy. Particularly in low- and middle-income countries (LMICs), where constraints often lead to reliance on foreign resources, IFIs can act as agenda-setters, transferring their ideas to vulnerable governments. The neoliberal model promoted by IFIs at the end of the 20th century reveals their influence on domestic policy in South America. This study analyses the impact of World Bank (WB) prescriptions on healthcare reform legislation in five South American countries: Argentina, Bolivia, Colombia, Paraguay, and Peru. In doing so, it attempts to answer the following questions: Are LMICs receptive to IFIs' healthcare system prescriptions? More precisely, have WB policy prescriptions been adopted in healthcare reform legislation in South American countries? If so, in what way? Through content analysis, this study examines domestic healthcare legislation vis-à-vis the WB's prescriptions. The main findings show that countries are receptive to IFIs prescriptions, making them a legitimate source of policy recommendations. Further, the results suggest a correlation between economic development and reliance on foreign resources and the degree to which countries adhere to IFIs prescriptions.

Keywords
healthcare legislation; healthcare reform; international financial institutions; low- and middle-income countries; neoliberal health model; policy transfer; social policy prescriptions; South America; World Bank

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1. Introduction

At the centre of recent comparative literature on the welfare state is the role of international financial institutions (IFIs) in shaping domestic policymaking. Further, policy transfer and diffusion research suggests the mechanisms through which ideas migrate to countries from foreign sources. Emulation and learning processes indicate that countries may conform to international trends without assessing their content or adapt foreign knowledge to fit their own circumstances. Especially for low- and middle-income countries (LMICs), which can substantially rely on foreign resources, IFIs can use their prominence to influence countries to adopt specific agendas (Clements et al., 2013; Kaasch, 2013). For example, with the neoliberal health model's dissemination in the last decades of the 20th century, the World Bank (WB) was considered a main healthcare reform advocate. Extant research has addressed the policy implications and outcomes of such reform adjustments (e.g., Haggard & Kaufman, 2008; Homedes & Ugalde, 2005). However, the influence of prescriptions on domestic healthcare legislation has received less attention, especially in cross-national studies. This is of interest because analysis of the legal basis of healthcare systems displays variations among countries, demonstrates how countries interact with IFIs, and offers potential explanations regarding why nation-states approach IFIs prescriptions differently. Furthermore, if legislation is fully implemented, adopting foreign ideas may have direct implications for healthcare access and, consequently, health outcomes.

This research examined how IFIs policy agendas, specifically that of the WB, were adopted in domestic legislation in South American LMICs and addressed the following questions: Are LMICs receptive to IFIs' healthcare system prescriptions? Have WB policy prescriptions been adopted in healthcare reform legislation in South America? If so, in what way? To answer these questions, a content analysis was conducted of key domestic healthcare reform legislation in Argentina, Bolivia, Colombia, Paraguay, and Peru, vis-à-vis the prescriptions set by the WB's *World Development Report: Investing in Health* (1993). This approach allows for the comparison of reforms in countries with distinct domestic conditions but similar international economic and ideological contexts within a specific timeframe, when a uniform neoliberal agenda was proposed to address the consequences of economic crises in the region. The main findings of this research show that countries were receptive to IFIs prescriptions, making them a legitimate source of policy recommendations. Further, it suggests a correlation between economic development and reliance on external resources and the degree to which countries adhered to WB prescriptions.

This study, however, is not without limitations. First, only legislation from reforms in the 1990s was analysed, without considering previous healthcare systems. The measures presented in the examined legislation could have replicated what was already in place. Second, the study did not consider healthcare system performance before and after the reforms, which may suggest the willingness to accept foreign models and outcomes of such recommendations. Third, this study only analysed the adoption of IFIs prescriptions based on the language of domestic legislation, without considering whether these were actually implemented or impacted healthcare systems beyond their legal framework. Finally, although economic and political factors in the year prior to the reform were presented, internal conditions were not analysed in detail.

First, this article discusses IFIs' influence in shaping social policy, the mechanisms through which prescriptions were conveyed from these organisations to countries, and the roles of the WB and neoliberal health agenda in setting healthcare policy. Then, healthcare reform in five South American countries is described, followed by a discussion on the methods used to analyse healthcare reform legislation. Finally, the analysis results are examined, and the findings are used to evaluate how WB policy prescriptions were translated into domestic healthcare legislation.

2. The Influence of International Financial Institutions on Domestic Policy

New approaches to social policy, such as global social policy and the transnational interdependence framework, emphasise IFIs' role in shaping policy and related processes (Deacon, 2007; Kaasch, 2013; Obinger et al., 2012). Beyond operating as financing agents through loans and aid, IFIs provide models and prescriptions, champion regulation and rights, and facilitate policy exchange (Kaasch, 2013; Orenstein, 2008). Research suggests that the influence of IFIs is greater in LMICs, as these institutions have high power status, leaving governments of less advanced economies more willing to accept their prescriptions. Especially during crises, IFIs can exert their will on LMIC governments, acting as agenda-setters of domestic reform (Stallings, 1992; Wireko & Béland, 2017). For instance, research indicates that the WB substantially impacted the wave of structural reforms in Latin America at the end of the 20th century, spreading beliefs regarding the economic gains of privatisation and using financial and technical resources to persuade policymakers (Haggard & Kaufman, 2008; Madrid, 2005).

IFIs can influence domestic social policy by providing ideas and practical models that promote normative conceptions regarding desirable forms of social policy (i.e., prescriptions; see Deacon, 2007). Research suggests that these foreign ideas indicate the range of possible policy solutions and suggest the associated costs and benefits of adopting them (Madrid, 2005). As these propositions are not legally bound, countries have autonomy to accept or reject ideas IFIs disseminate. However, asymmetrical power relations between IFIs and nation-states can affect willingness to adopt recommendations (Wireko & Béland, 2017). According to Simmons et al. (2008), international ideas are transferred/diffused and institutionally embedded through competition, coercion, learning, and emulation mechanisms. *Competition* occurs when governments adopt policies to gain a competitive advantage over countries competing for the same resources (Obinger et al., 2012). *Coercion* suggests that prominent actors use their power to influence LMIC policymaking, leaving governments unable to seek alternatives to IFIs agendas (Simmons et al., 2008; Wireko & Béland, 2017).

Although studies have highlighted the importance of the previously mentioned mechanisms for policy diffusion/transfer (e.g., Leibfried & Pierson, 1995; Obinger et al., 2012), the present analysis focused on learning and emulation, to determine whether domestic legislation can demonstrate how IFIs prescriptions are incorporated into laws. Regarding *learning*, governments may assess the content of prescriptions, such as norms, practices, and beliefs, and adapt them to the domestic context. To mitigate uncertainty, policymakers tend to follow best practices. Although research often focuses on learning between countries (e.g., Kahneman, 2003), learning mechanisms can also be observed between IFIs and nation-states as countries can use external recommendations as blueprints to develop their own policies (Obinger et al., 2012; Rose, 1991; White, 2020). *Emulation*, on the other hand, refers to national governments' willingness to conform to international trends and ideas to belong to a specific community. In a process White (2020) described as "follow the leader," countries imitate

the most powerful actors. Madrid (2005), for instance, suggested that ideas for which influential actors advocate will likely be enacted, regardless of their merits. Emulation can be intentional, as in a country accepting a prescription related to a specific issue (e.g., human rights) as it stands, to retain its status and avoid repercussions. Alternatively, emulation can be automatic, in which a country blindly adopts trends without evaluating their merits, costs, or benefits (Goodman & Jinks, 2013).

Research shows that ideas are not transmitted perfectly from the international to the national level, as domestic factors, such as socio-political context and national stakeholders, can impede the transfer of foreign prescriptions or alter their content (Orenstein, 2008; White, 2020). Research further suggests that asymmetrical power dynamics make LMICs susceptible to accepting IFIs agendas. Therefore, analysing the influence of a main international player, such as the WB, on domestic healthcare reforms should demonstrate variation in the ways in which prescriptions are adopted and translated into domestic legislation in different LMICs. Evidence of policy transfer and diffusion mechanisms across different countries is necessary to understand IFIs domestic policy influence, as it may suggest whether emulation and learning are more likely to occur in countries with specific conditions.

2.1. The World Bank as a Champion of Healthcare Reform

By the end of the last century, there was a universal agreement among IFIs regarding the measures necessary for LMICs to improve their economies. From what came to be referred to as the "Washington Consensus," Washington D.C.-based organisations, such as the WB, International Monetary Fund, and United States' Department of the Treasury, promoted neoliberal policies targeting less-advanced economies in market-oriented programmes focusing on "the retrenchment of the welfare dimension of the state, which is seen as an impediment to the optimal functioning of the markets" (Mladenov, 2015, p. 446). This market-based approach aimed to achieve macroeconomic stabilisation through the reduction/reallocation of public expenditure, privatisation, and liberalisation, and decrease the government's role in the economy (Hancock, 1999; Undurraga, 2015). The Washington Consensus initially set this policy agenda to ease the recovery of Latin American countries after significant economic crises in the 1980s (Williamson, 1990). Technical advice combined with foreign lending triggered a wave of structural reforms in Latin America, such as social reforms (e.g., pensions and healthcare), economic reforms (e.g., liberalisation of financial and commercial markets), and tax reforms (Almeida, 2002; Haggard & Kaufman, 2008; Homedes & Ugalde, 2005; Mesa-Lago, 2008; Williamson, 1993). In healthcare, the neoliberal model, which centred on controlling healthcare costs, was used to intervene in the way services were financed and provided, emphasising decreased public spending and a larger role for the private sector (WB, 1993). This homogenous health agenda, supported by the most influential actors at the time, was mainly promulgated by the WB (Almeida, 2015).

The WB was the largest international health lender and reform advocate by the end of the 20th century (Homedes & Ugalde, 2005; Tichenor & Sridhar, 2017). Its expanding financial participation in healthcare-related projects boosted its credibility as an important player. During its history, the WB's ideas regarding healthcare have evolved. In the 1970s, the WB mainly focused on population control, followed by projects that emphasised healthcare direct lending. Healthcare system reforms were the main focus of the 1980s and 1990s. At the beginning of the 21st century, the WB turned its attention to healthcare system enhancement (Tichenor & Sridhar, 2017). Currently, the WB mostly advocates for universal health coverage through the investment of primary healthcare to improve access and manage health costs (Maeda et al., 2014). Aside from declaring universal health coverage to be a basic human right and increasing access to healthcare, the WB also claims there are political and economic gains in implementing universal coverage (Maeda et al., 2014; WB, 2019).

This article, however, focuses on the period in which the WB pushed for neoliberal reforms, between 1993 and 2000. Although the organisation published general prescriptions on healthcare reform still in the 1980s (e.g., WB, 1987), the WB's *Investing in Health* report of 1993 is considered the benchmark for LMIC healthcare reforms (Ruger, 2005; Unger et al., 2008). The report proposes a pragmatic approach based on economic principles of cost reduction and performance increase which fall under the neoliberal principles forwarded by the Washington Consensus (Almeida, 2015; WB, 1993). The report puts forth recommendations for decreasing government's role in healthcare (e.g., non-public financing and provision, decentralisation, community control, increased efficiency), reallocating public expenditure (e.g., transferring public spending to specific services and societal groups), promoting liberalisation (e.g., freedom of choice), and increasing the private sector's role (e.g., non-public financing and provision, deregulation, promoting the entry of new players to boost competition; Ruger, 2005; WB, 1993). The report claims that "the adoption of main policy recommendations by developing countries' governments would enormously improve the health status of their people…and would also help to control healthcare spending. Millions of lives and billions of dollars could be saved" (WB, 1993, p. 13).

3. Research Design

3.1. The Cases

By the end of the 1950s, all South American countries had institutionalised healthcare systems. However,

they were restricted to specific social groups (i.e., formal employees), and approximately 75% of the population was not covered by any scheme (Giovanella & Faria, 2015). In theory, individuals without healthcare coverage were the responsibility of health ministries; however, these were underfunded, politically weak, and institutionally inefficient (Haggard & Kaufman, 2008; Mesa-Lago, 2008). Therefore, healthcare systems in the region were characterised by access inequalities, inadequate regulation, and insufficient financial, technical, and human resources. To address these challenges and attempt to overcome the region's debt crisis, 10 out of 12 South American countries underwent healthcare reforms at the end of the 20th century: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay, and Venezuela. This study included all reforms that began after the *Investing in Health* report was published, and were completed before 2000, when the WB shifted focus from healthcare reform to healthcare system enhancement. This excluded Brazil, Chile, Ecuador, and Uruguay (Mesa-Lago, 2008). Unfortunately, Venezuela was not considered, as relevant legislation could not be retrieved.

During the examined period, the five analysed countries shared similar characteristics. Most important was the re-democratisation that all these countries, except Colombia, underwent at the time. Argentina, Bolivia, Paraguay, and Peru all experienced a return to democracy from military dictatorships, which was followed by reconstruction of democratic institutions and practices (Frantz & Geddes, 2016). At the time of the reforms, countries were governed by centre, centre-right, or right parties (Coppedge, 1997), and were beginning to recover from the debt crisis of the 1980s, which resulted in failed public services, including those pertaining to healthcare (Alesina, 2005; Felix, 1990). Between 40% and 65% of the population lived in poverty, with Argentina being an exception. Further, foreign debt as a percentage of GNI was approximately 30% in Argentina, Colombia, and Paraguay, and 54% and 82% in Peru and Bolivia, respectively (WB, 2021), leaving these countries more susceptible to international pressure. Table 1 shows selected information on each country's internal conditions one year before reform began. For instance, as Argentinean and Colombian reform started in 1993, the data for these countries refer to 1992.

Although the WB's recommendations generally targeted LMICs, the neoliberal agenda in place at the end of the 20th century was initially developed to ease the recovery of Latin American countries facing significant economic crises (Williamson, 1990), making the five countries suitable for analysing the influence of IFIs on domestic reforms.

3.2. Data Collection and Analysis

The data for this research came from two main sources: the WB and domestic legislation. First, the *World Development Report: Investing in Health* (1993), the most influential document on healthcare reform published by the WB, was analysed (Almeida, 2015; Ruger, 2005; Unger et al., 2008). It sets key recommendations for LMICs to create "an environment that enables households to improve health, improve government spending

Table 1. Domestic conditions prior to reform, by country (reference year in parentheses).

	Argentina (1992)	Bolivia (1995)	Colombia (1992)	Paraguay (1995)	Peru (1996)
Classification party in power, executive branch (Coppedge, 1997)	Centre-right	Centre-right	Centre	Right	Right
Classification party in power, legislative branch (Coppedge, 1997)	Centre-right	Centre-right	Centre	Right/Centre-left	Right
External debt (% GNI; WB, 2021)	30.5	82.3	31.2	32	54.1
GDP per capita growth (annual %; WB, 2021)	6.4	2.5	2	4.3	0.9
GDP per capita, PPP (constant 2017 international $; WB, 2021)	16,209	5,050	8,478	9,311	6,210
Net ODA received (% GNI; WB, 2021)	0.1	10.4	6.9	0.4	0.6
Population living on less than 5.5 US dollars/day (% total population; ECLAC, 2021)	14.8	65	46.7	40.2	54

on health, and promote diversity and competition" (WB, 1993, p. 6). The document is 329 pages long and divided into seven parts. In chapters one through six, household capacity, the roles of the government and private sector in healthcare, public health status, and clinical services are discussed as they pertain to health conditions in LMICs. Chapter seven summarises the main findings of the report and sets a policy-reform agenda for LMICs. This chapter was examined in the present study. Additionally, this study considered the legal framework of healthcare reform in the five countries (Table 2). First, the policies indicated by healthcare authorities in each country enacted during the reform period were examined. These were cited in a report organised by the South American Institute of Government in Health (ISAGS) and authored by South American health ministries. When the report did not clearly indicate the main legislation of a country's reforms, relevant literature was reviewed to identify the documents constituting the reforms. Notably, healthcare reform processes were often a combination of acts. As a result, some of the legislation encompasses more policy fields than only healthcare. This study, however, only considered measures related to healthcare, excluding any references to other fields.

To guide the analysis, a codebook based on the prescriptions set by the report was created (Table 3). These prescriptions were categorised into three themes: financing, regulation, and service provision. The analysis in the first instance was based on inductive logic using the codes created from analysing the report. In the second stage, all legislation was deductively examined against the themes. The legislation was systematically examined using content analysis (see Neuendorf & Kumar, 2015). The approach used in this research comprised the following steps: (a) identifying the main documents based on secondary literature and those indicated by governmental bodies, (b) examining the WB's *Investing in Health* report to identify its main themes and prescriptions, (c) creating a codebook, (d) coding the legislation using the codebook, (e) quantitatively describing the results, and (f) qualitatively analysing and interpreting the documents' content. Altogether, 13 documents containing 163 pages were evaluated using NVivo software. The author systematically coded the textual data.

4. Results

In total, 420 references to the codes were identified across 12 laws. The WB prescriptions were cited most in Argentina and Colombia, with legislation including 122 and 124 references, respectively, to the main themes. The Paraguayan legislation contained 82 references to WB recommendations. In the Bolivian and Peruvian

Table 2. Policy documents.

Country	Legal act	Contents	Sources
Argentina	Decree No. 9/1993	Guarantees beneficiaries the freedom of choice to select healthcare providers	Cetrángolo and Devoto (2002)
	Decree No. 576/1993	Regulates the Sistema de Obras Sociales (health insurance) and the Sistema National del Seguro de Salud (national health insurance)	ISAGS (2012)
	Decree No. 1615/1996	Consolidates healthcare institutions and decentralises their functions	ISAGS (2012)
	Resolution No. 247/1996	Creates the Médico Obligatorio (mandatory physician) programme and regulates co-payments	ISAGS (2012)
	Decree No. 53/1998	Decentralises healthcare services	ISAGS (2012)
Bolivia	Law No. 24303/96	Creates a healthcare scheme targeting mothers and children	Lozano (2002); PAHO (2008)
	Decree No. 25265/98	Creates the Seguro Básico de Salud (basic health insurance)	PAHO (2008)
Colombia	Law No. 100/1993	Reforms the social security system	ISAGS (2012)
Paraguay	Law No. 1032/1996	Creates the national health system	ISAGS (2012)
	Law No. 19966/1998	Decentralises the national health system and encourages community participation	Recalde (1999)
Peru	Law No. 26790/1997	Reforms the social health insurance system	Barboza-Tello (2009); Sanabria (2001)
	Law No. 26842/1997	Defines the responsibilities of the healthcare system	ISAGS (2012)

Table 3. Simplified codebook.

Main Theme	Main Codes	Recommendations
Financing	Non-public financing	Encourage private and external sources to finance healthcare services
	Priorities, public expenditure	Reallocate public spending to basic healthcare services, provision of services for vulnerable groups, and local health facilities
Regulation	Community control	Encourage community control of healthcare services
	Decentralisation	Decentralise government healthcare services, offering greater autonomy to local units of the system
	Deregulation	Abolish the domestic regulation of pre-paid schemes and decrease bureaucracy
	Efficiency, public sector	Increase the effectiveness of the healthcare public sector through payment incentives and decentralisation
	Freedom of choice	Allow beneficiaries the freedom to choose their insurer and provider
Service Provision	Benefits package	Create and define a minimum set of healthcare services to be available to beneficiaries
	Coverage	Prioritise the delivery of healthcare services for vulnerable populations
	Non-public provision	Encourage the private sector to deliver healthcare services
	Quality	Improve the quality of healthcare services through quality control, investment in local facilities, community financing, and competition

Note: Complete codebook and coded documents available upon request to the author.

legislation, there were 42 and 50 citations, respectively. Regarding the number of times each prescription appeared, the predominant codes were benefits package (73), quality (65), coverage (64), and decentralisation (58). All but two prescriptions were mentioned at least once in each country's legislation. Deregulation only appeared in Argentinean and Colombian legislation, and freedom to choose insurers and providers did not appear in Bolivian and Paraguayan legislation.

Figure 1 shows the share of codes by main themes in the WB prescriptions, by country. Prescriptions related to "service provision" were referred to most frequently in the Bolivian, Peruvian, and Colombian reforms, accounting for 76%, 62%, and 60% of the codes, respectively. This

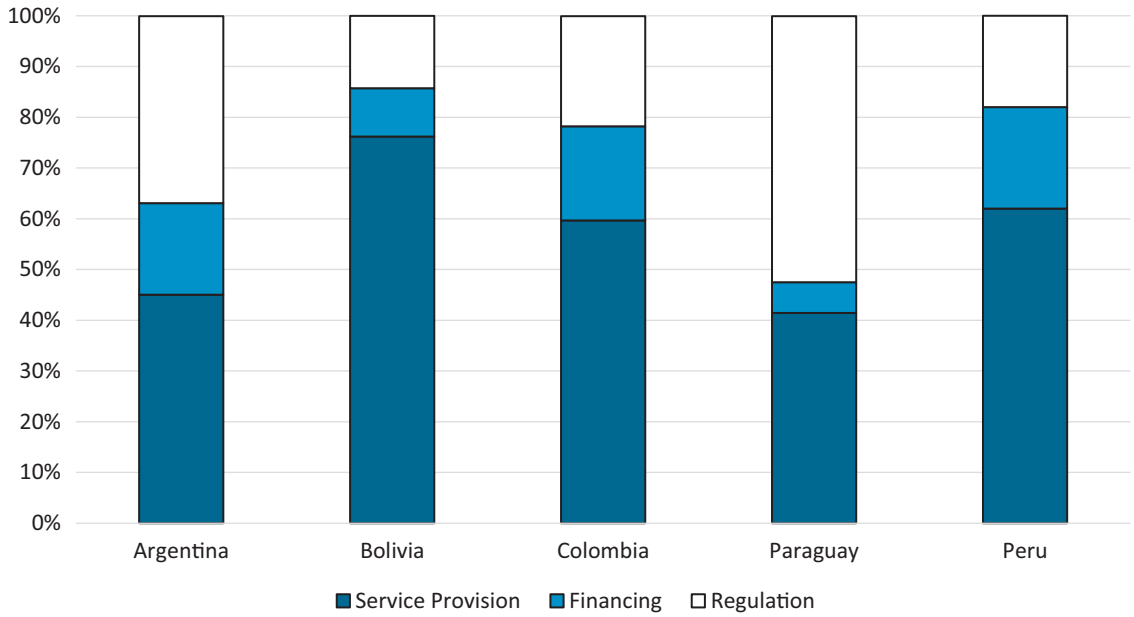

Figure 1. Share of codes by main themes of the WB prescriptions, by country.

decreased to 45% and 41%, respectively, in Argentina and Paraguay. Recommendations related to "coverage" accounted for 28% and 22% of the codes in Bolivia and Peru, respectively, and was the most frequently mentioned recommendation in Colombia. For Argentina, Paraguay, and Peru, this decreased to 5%, 13%, and 16%, respectively. "Benefits package" was the recommendation most mentioned in Bolivian legislation, with 33% of the references related to the definition of a minimum package of services. Additionally, 18% of the codes in both Argentina and Peru, and 15% in Colombia, and 10% in Paraguay referred to benefits package. "Quality of services" was the most cited recommendation in Argentina (20%) and Peru (22%). This decreased in Colombia, Paraguay, and Bolivia, to 17%, 8%, and 2%, respectively. Ultimately, In Bolivia, Paraguay, and Peru, 12%, 10%, and 6% of the total number of citations, respectively, mentioned "non-public provision." This decreased to 5% in Colombia and 2% in Argentina.

Prescriptions related to "regulation" were the first and second most often cited in the Colombia (52%) and Argentina (37%). For Colombia, Peru, and Bolivia, these represented 22%, 18%, and 14% of all codes, respectively. In Bolivia and Argentina, 34% and 17% of the codes, respectively, referred to "decentralisation." This was the code that appeared most often for Bolivia and third most often for Argentina. For the other three countries, decentralisation comprised 5% of the total codes on average. Approximately 9% of the codes in Colombia and Paraguay addressed "community control." For the other countries, this recommendation averaged 3%. Furthermore, "freedom of choice" was only referenced in the legislation of Argentina (10%), Colombia (5%), and Peru (10%). Measures concerning deregulation only appeared in Argentinean (5%) and Colombian (2%) legislation. Finally, prescriptions associated with "financing" were cited least across all countries, representing approximately 20% in Argentina, Colombia, and Peru, and 10% and 6% in Bolivia and Paraguay, respectively. In Peru, Argentina, and Colombia, "non-public financing" accounted for 16%, 15%, and 14% of the codes, respectively. For the remaining countries, this recommendation accounted for approximately 3%. On average, 4% of the codes referred to "priorities of public expenditure" and "public sector efficiency" in each country.

In total, the five countries adopted 57 measures associated with the WB prescriptions in three ways. First, they enacted the measure exactly as prescribed by the WB, such as implementing co-payments and pre-paid insurance schemes (replicated measure). Second, they enacted the measure, but adapted it to suit the local context (adapted measure). Third, they disregarded the WB prescription (contradicting measure).

4.1. Prescriptions on Healthcare Systems Financing

The WB report contained two main prescriptions on healthcare funding: reallocating public spending to specific services and societal groups and expanding non-public financing. These recommendations were addressed in 11 measures enacted across the five countries (Table 4). The report suggested public expenditure be reallocated to (a) basic clinical care, (b) services for vulnerable groups, and (c) local healthcare facilities (WB, 1993, pp. 158, 163). Bolivia, Colombia, and Peru explicitly prioritised vulnerable populations, such as children, mothers, and the poor. The Colombian legislation specifically referenced public financing for local healthcare facilities. Regarding assigning public funding for basic healthcare services, Argentina focused on clinical care, and Paraguay on primary care. Argentina and Bolivia exceeded the WB prescriptions, guaranteeing funding for public hospitals.

The second prescription for funding healthcare systems addressed mobilising financing resources other than public money to boost the healthcare budget and decrease reliance on government funds (WB, 1993, pp. 157, 159). In particular, the report referred to

Table 4. Financing measures.

		Implemented measures by country				
Prescription	Measures	Argentina	Bolivia	Colombia	Paraguay	Peru
Non-public financing	Co-payment†	X		X		X
	Complementary insurance§	X		X		
	Contribution†	X		X		X
	Mobilise foreign resources†				X	
	Mobilise not-for-profit organisational resources§		X		X	
Public Expenditure Priorities	Ensure clinical care†	X				
	Establish local health facilities†			X		
	Ensure primary care§				X	
	Provide care for children and mothers†		X			
	Provide care for the poor and vulnerable groups†			X		X
	Fund public hospitals§	X	X			

Note: † replicated measure, § adapted measure, * contradicting measure.

co-payments, pre-paid insurance schemes, and external funds. Paraguay was the only country to implement a measure specifically noting external resources as a healthcare financing source. Argentina, Colombia, and Peru adopted co-payment and payroll contribution mechanisms. Paraguay and Bolivia encouraged the mobilisation of private resources through collaboration between public and private not-for-profit institutions. Argentina and Colombia also established complementary insurance to make services available that were not included in the minimum benefits package.

4.2. Prescriptions for Healthcare System Regulation

Regarding regulation, the WB provided five groups of recommendations, in response to which the analysed countries developed 22 measures (Table 5). Notably, recommendations on system regulation were not as specific as

Table 5. Regulation measures.

		Implemented measures by country				
Prescription	Measures	Argentina	Bolivia	Colombia	Paraguay	Peru
Community control	Administrative participation§	X	X	X	X	X
	Participation in developing health campaigns and policies§				X	
	Participation in implementing health campaigns and policies§				X	
	Create user associations to regulate providers, if possible§			X		
	Give communities responsibility to evaluate services§	X		X		
Decentralisation	Transfer budget planning to local governments§	X	X			
	Transfer the creation of organisational structures to local governments§	X			X	
	Transfer implementation of policies and processes to local governments§	X			X	
	Transfer the administration of resources (financial, human, and infrastructure) to local governments§	X	X	X	X	X
	Transfer the responsibility to establish fees to local governments§	X			X	
	Transfer control responsibilities to local governments§	X	X		X	X
Deregulation	Abolish regulations related to freedom to choose insurers§	X		X		
	Abolish regulations related to freedom to choose providers§	X		X		
	Decrease control over pre-paid schemes†	X		X		
Efficiency, public sector	Use technical resources (service provision) more efficiently§	X	X	X	X	X
	Use administrative resources more efficiently§	X		X	X	
	Use financial resources more efficiently§			X	X	
	Increase provider productivity through financial bonuses†			X		
	Increase provider productivity through continuing education§			X		
Freedom of choice	Secure competition between public and private sectors†			X		
	Secure freedom to choose insurers†	X		X		X
	Secure freedom to choose providers†	X		X		

Note: † replicated measure, § adapted measure, * contradicting measure.

those on service provision and financing. Although the WB provided guidelines on community involvement in financing healthcare, it did not prescribe methods for how communities should regulate healthcare. As the prescriptions were not detailed, countries developed their own measures. All five countries assigned administrative responsibilities to local communities and appointed local members to managerial roles. For example, Argentina transferred all administrative powers to communities, freeing the state to focus on aspects of the system that could not be monitored by communities. Paraguayan communities were also made partially responsible for developing and implementing health campaigns and policies, and Colombia delegated the regulation of providers and service evaluation to communities. Argentinean legislation also assigned communities the responsibility of evaluating service delivery.

The WB pushed two measures to increase public sector efficiency: payment incentives and decentralisation. Colombia, however, was the only country that developed financial and continuing education programmes for health professionals. Nonetheless, reducing public-sector inefficiency was cited in all five countries' legislation. For example, all countries' legislation mentioned better use of resources, such as technical (Argentina, Bolivia, Colombia, Paraguay, and Peru), administrative (Argentina, Colombia, and Paraguay), and financial (Colombia and Paraguay). Regarding decentralisation, the WB (1993, p. 163) claimed that it was "potentially the most important force for improving efficiency and responding to local health conditions and demands." The WB did not refer to a specific prescription on which responsibilities should be decentralised; the report only mentioned that greater autonomy should be provided to local units of the system. In all the countries' legislation, six responsibilities were transferred from national to local governments. Specifically, administration of financial, human, and infrastructure resources were assigned to local governments. Further, in all countries except Colombia, local governments were assigned the responsibility of controlling healthcare. The Argentinean and Paraguayan national governments also transferred the authority to create organisational structures, implement policy and processes, and set healthcare service fees to local governments. Finally, in Argentina and Bolivia, budget planning became the responsibility of local governments.

The WB (1993) also advocated for freedom of choice and deregulation, claiming that free competition within the healthcare sector would improve quality and encourage efficiency. According to the WB, consumers should have the freedom to choose their insurers, and there should be free competition between public and private healthcare providers and between service suppliers. Through eliminating pre-existing regulations and ensuring free competition, measures allowing consumers to choose insurers (Argentina, Colombia, and Peru) and providers (Argentina and Colombia) were established. In fact, a central goal of the Colombian reform was to secure free competition between the private and public sectors. Regarding deregulation, the WB (1993, p. 161) encouraged governments to promote non-public schemes by removing legal barriers impeding their operation, which both Argentina and Colombia did. Argentinean legislation also dissolved rules that hindered users from choosing insurers and healthcare providers. However, neither Bolivia nor Paraguay implemented measures on freedom of choice or deregulation.

4.3. Prescriptions on Service Provision

Table 6 shows how the countries approached recommendations on health service delivery. As previously mentioned, the creation of a standardised minimum service package was the most-referenced prescription (73). The WB report advised that a minimum set of health services must be available to all beneficiaries. Although the report recognised that countries have different healthcare needs, and that such a package should be defined by each nation, the WB emphasised the importance of delivering essential clinical services, specifically "sick-child care, family planning, prenatal and delivery care, and treatment for tuberculosis and sexually transmitted diseases (STDs)" (p. 7). All countries' legislation provided for the minimum services defined by the WB; sick-child, prenatal, and delivery care would be available to all beneficiaries. Additionally, all legislation established more comprehensive packages than the minimum the WB recommended. For example, Argentina provided primary, secondary, tertiary, dental, and psychiatric care. The other countries guaranteed additional primary and clinical care services. Family planning measures were adopted in Bolivia, Paraguay, and Peru. Argentina, Bolivia, and Colombia guaranteed treatment for tuberculosis and STDs. Other health services not covered by the minimum benefits package, such as treatment for diseases with low incidence and high costs, were available through user fees in Argentina, Colombia, and Peru.

As previously mentioned, a main goal of the WB's *Investing in Health* was to reduce the size and cost of the public sector and only provide public services to vulnerable groups, namely the poor, mothers, and children:

> Effective targeting of publicly subsidised clinical services to the poor, and corresponding efforts to encourage cost recovery from more affluent groups, would help stretch limited government budgets…to improve the quality and efficiency of public health services and essential clinical care, especially for mothers and children. (WB, 1993, pp. 158, 169)

The analysed legislation clearly stated which group(s) benefited from public services and spending. Contrary to the WB's recommendations, all Bolivian and Paraguayan citizens were entitled to public healthcare. The Paraguayan legislation stated that comprehensive

Table 6. Service provision measures.

		Implemented measures by country				
Prescription	Measures	Argentina	Bolivia	Colombia	Paraguay	Peru
Benefits Package	Create a minimum benefit package†	X	X	X	X	X
	Provide sick-child care†	X	X	X	X	X
	Provide family planning actions†		X		X	X
	Provide prenatal and delivery care†	X	X	X	X	X
	Provide tuberculosis and STD treatment†	X	X	X		
	Provide other services§	X	X	X	X	X
Coverage	Provide coverage for children†		X			
	Provide coverage for mothers†		X			
	Provide coverage for poor population †			X		X
	Provide coverage for residents*		X		X	
	Social health insurance contributors§	X		X		X
Non-public Provision	Incentivise and invest in private for-profit facilities†	X	X	X	X	X
	Incentivise and invest in private not-for-profit facilities†		X	X	X	
Quality	Establish standards for service provision§	X		X	X	X
	Provide services with similar quality standards§	X	X	X	X	X
	Establish government control of service provision†		X	X	X	X
	Establish government evaluation of service provision†		X	X	X	
	Establish provider control of service provision†					X
	Establish provider evaluation of service provision†					X
	Establish beneficiary control of service provision†	X				
	Establish beneficiary evaluation of service provision†	X		X		
	Invest in local facilities†			X		
	Establish community financing†	X		X		X
	Ensure freedom to select insurers†	X		X		X

Note: † replicated measure, § adapted measure, * contradicting measure.

services would be available to the entire population, without political, economic, or social discrimination (Paraguay National Government, 1998). However, the country also implemented additional prevention and primary care programmes targeting vulnerable groups. The first healthcare reform legislation enacted in Bolivia focused only on mothers and children, creating specific health programmes for them (Bolivia National Government, 1996). However, subsequent legislation expanded coverage to all residents (Bolivia National Government, 1998). Comparable to Paraguay, the legislation also acknowledged specific health needs of vulnerable groups, children, women, rural communities, and the poor.

Colombia and Peru adopted similar approaches to healthcare coverage, matching the WB prescriptions. These countries established two parallel systems, one for groups that could afford social health insurance through payroll contributions and another for the poorest segments of society. The Peruvian reform legislation stated that public funding should fully or partially pay for healthcare for underprivileged groups not covered by other schemes. The healthcare system segmentation in Colombia was even more institutionalised, creating "contributory" and "subsidised" systems. The former comprised all formal employees, public servants, pensioners, retired people, and those who could afford insurance, while the latter targeted the poorest and most vulnerable segments of society. The contribution rate of the subsidised system was based on socioeconomic factors. Although the legislation claimed there would be no difference in terms of service provision between the systems, subsidised beneficiaries were not able to select health providers or insurers. Finally, the Argentinean reform only addressed pre-paid health insurance schemes, without providing specific guidance for those who could not afford them.

Further, the WB (1993, p 157) recommended outsourcing healthcare provision, encouraging the private sector to deliver clinical services, "including those that are publicly financed." The report, however, did not distinguish between for-profit and not-for-profit organisations. All countries incentivised services provided in private for-profit facilities. For example, in 1998, Paraguay

established a public-private partnership as a mechanism to increase health coverage. Bolivia, Colombia, and Paraguay also explicitly encouraged the delivery of services by not-for-profit facilities, such as churches, charities, and associations. Finally, the WB (1993) stated that countries should improve the service quality through quality control, investment in local facilities, community financing (user fees and pre-paid insurance), and freedom to choose insurers. The WB did not designate which actors should be responsible for quality control. In Bolivia, Colombia, and Paraguay, the state was responsible for regulating and assessing service quality, although in Paraguay, service evaluation was shared between the state and beneficiaries. Argentina transferred both obligations to beneficiaries. In Peru, providers were responsible for controlling and evaluating services, but shared control with the state. As previously mentioned, Colombia was the only country that explicitly allocated public funding to local facilities. Community financing and freedom to choose insurers were guaranteed in Argentina, Colombia, and Peru. All the countries went beyond WB prescriptions by guaranteeing services with similar quality standards would be provided to all citizens, and all countries but Bolivia created service provision standards.

5. Discussion and Conclusion

Recent literature on the comparative welfare state emphasises IFIs' influence on domestic policymaking. These institutions provide social policy prescriptions to national governments, setting agenda for reform. For LMICs, where power asymmetries and reliance on foreign resources can be considerable, the impact of IFIs can be even more substantial. The mechanisms through which international knowledge is transferred from global actors to nation-states has also been examined. This research focused on emulation and learning processes, in which governments conform to international knowledge, copying trends in the case of the former, and adapting foreign practices to suit the national context after assessing their merit, in the case of the latter. To indicate whether and how prescriptions formulated by IFIs are adopted in the content of domestic healthcare policy, a content analysis was conducted of key South American healthcare reform policy documents vis-à-vis recommendations provided by the WB.

This study's first main finding is that almost all WB prescriptions were addressed across the five countries. Argentina and Colombia developed measures that addressed all the recommendations, Peru cited all recommendations except deregulation, and Bolivia and Paraguay mentioned nine recommendations, leaving aside deregulation and freedom of choice. These results show that WB prescriptions had a meaningful impact on healthcare reform content in all five countries, as the 11 prescriptions resulted in 57 measures. Figure 2 shows the measures each country adopted. Black denotes the share of prescriptions adopted exactly as recommended (replicated measures). Grey displays the share of measures that were related to the recommendations but were adapted to fit local context (adapted measures). White highlights the proportion of the measures that did not align with WB instructions (contradictory measures).

Of the WB prescriptions, 31 were accepted exactly as recommended (replicated measures): 19 related to service provision, seven to financing, and five to regulation. In absolute terms, Colombia adopted most WB prescriptions exactly as recommended (23; 60.5% of all measures). In Peru, 65% (15) of the measures were accepted exactly as they were prescribed. Argentina and Bolivia enacted 16 (47%) and 13 (56%)

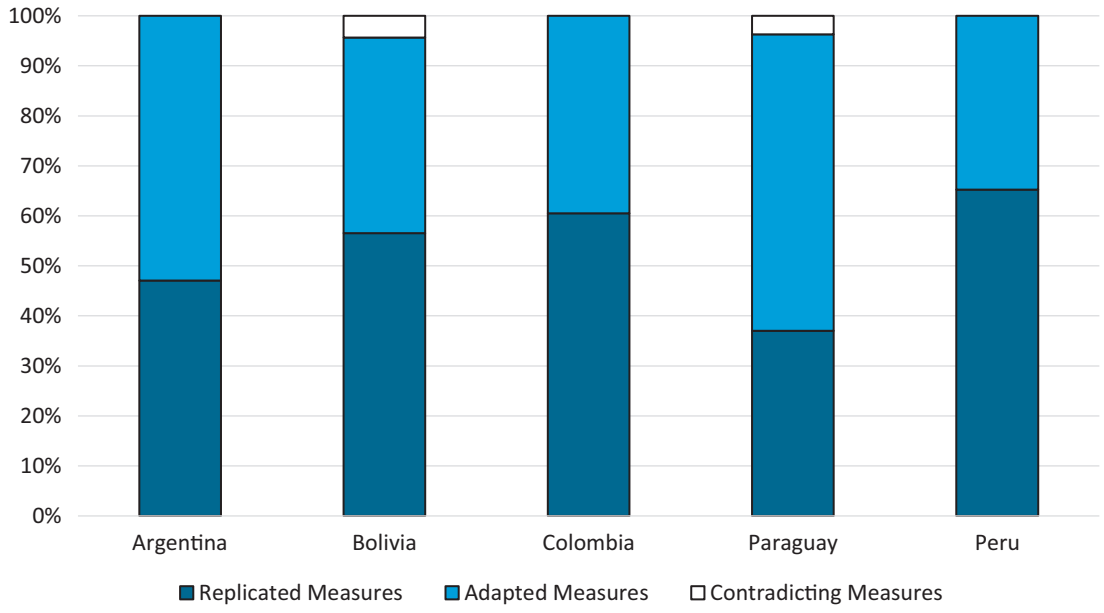

Figure 2. Measures adopted by country.

recommendations as prescribed, respectively. Paraguay implemented 10 (37%) prescriptions exactly as provided. Prescriptions on service provision were the most accepted as they were stipulated (19), representing 61% of all accepted measures. Colombia and Peru adopted the most prescriptions on service provision (13) exactly as stipulated. Measures on financing were disregarded most often. Of the seven specific recommendations, Bolivia and Paraguay adopted only one exactly as recommended. In contrast, Colombia adopted most recommendations on financing exactly as prescribed. Of the five WB prescriptions on regulation, Paraguay and Bolivia did not adopt any exactly as proposed.

In what can be described as a learning process, countries also adapted the WB recommendations by slightly modifying or expanding their content according to the local context. In total, 25 measures were adapted. Of the five countries, Argentina and Paraguay most often adapted WB instructions: 18 (53%) and 16 (59%), respectively. This decreased for Bolivia and Colombia (almost 40%) and Peru (35%). The prescriptions on regulation were most often adapted, accounting for 17 measures across all countries. This seems logical, as prescriptions on regulation were not as specific as those on service delivery and financing. Finally, the analysis identified one contradicting measure. Although this may seem insignificant considering the number of replicated or adapted propositions, Bolivia and Paraguay disregarded the WB's chief recommendation by granting free universal healthcare coverage to all residents, rather than having public services target the most vulnerable segments of society. This was in direct contravention of the report's main goal of reducing the size and cost of the public sector.

Based on the present results, the Colombian and Peruvian reforms followed the recommendations most closely; over 60% of their measures followed the prescriptions exactly as recommended. This was closely followed by the Bolivian reform, with 56.6% of the measures conforming to the recommendations, although the targeting prescription was ignored. On the other hand, Argentina and Paraguay adapted the prescriptions most often. In particular, Paraguay modified or contravened the prescriptions in 64% of its measures. In Argentina, 53% of its measures were adapted or expanded to accommodate country specificities. The countries that followed the prescriptions more loosely showed similarities. At the time of their reforms, Argentina and Paraguay had the highest GDP growth and GDP per capita and received the least foreign aid/loans. Additionally, together with Colombia, they had the least foreign debt. In a region with high poverty levels, Argentina and Paraguay also had the lowest percentage of people living on less than $5.5/day. However, the share of people living on less than $5.5/day differed greatly between Argentina (14.8%) and Paraguay (40%). The countries that most closely emulated the WB prescriptions, Bolivia, Colombia, and Peru, also shared commonalities, particularly Bolivia and Peru. They had the least developed economies, with low GDP per capita, more than half of the population living in poverty, and an extremely high rate of foreign debt. Although the domestic circumstances of Colombia paralleled those of the countries that adapted the most measures (Argentina and Paraguay), it was receiving the second highest amount of foreign aid/loans at the time, which may have been a factor in why its reforms followed the WB prescriptions so closely.

The characteristics of countries that were more prone to replicate prescriptions point to a negative correlation between economic development and reliance on external resources and the willingness to adhere to prescriptions exactly as they were recommended, without adapting them to the domestic context. Notably, this study does not establish causal explanations, but identifies possible relationships that should be further investigated. In line with the literature, the content analysis provides robust evidence of alignment between LMIC domestic policy and WB recommendations. Further, it empirically shows that foreign ideas are not uniformly adopted among countries, and that ideas advocated for by influential actors are likely to be enacted, regardless of the content's merits, especially by more economically vulnerable countries. In the context of Latin American healthcare reforms during the 1990s, the timing and content of the legislation suggest that the WB indeed had an impact.

However, the present findings point to new research avenues. Thus, future studies must examine whether ratified measures were actually implemented. This is needed to assess the practical implications of foreign prescriptions and analyse the power dynamics between IFIs and national policymakers. Therefore, the results of this study raise further questions. Do LMICs implement foreign healthcare system prescriptions? How do IFIs' recommendations impact health outcomes in LMICs? If the prescriptions are legally ratified but not implemented, do LMICs enact IFIs recommendations only as a formality to not jeopardise their future relationships with IFIs? Alternatively, is the non-implementation of measures owing to a lack of institutional capability? As the implementation of foreign agendas could have major implications for healthcare access, costs, and outcomes, and, therefore, political and electoral ramifications, an analysis of how national stakeholders receive and interact with IFIs healthcare prescriptions is also necessary to elucidate the acceptance of international recommendations and whether healthcare is an arena of social dispute. Further, different methods, such as in-depth interviews and detailed case studies, are needed to confirm this study's main findings.

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Conflict of Interests

The author declares no conflict of interests.

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Article

The Gender Wage Gap in Peru: Drivers, Evolution, and Heterogeneities

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Abstract
Despite the recent economic growth and gender equality improvement in educational attainment, important gender disparities remain in the Peruvian labour market. This article provides a comprehensive overview of the Peruvian gender wage gap evolution during 2007–2018 and identifies key elements that explain its patterns. First, the article shows that the raw wage gap showed an upward trend between 2007–2011, ranging from 6% to 12%, and remaining around that top bound ever since. Second, using Oaxaca-Blinder decomposition we find that the unexplained wage gap has remained virtually unchanged at around 17% during the study period. Reductions in endowment differences between men and women coupled with a stagnant unexplained gap led to slightly larger raw wage gaps over time. Moreover, the stagnant unexplained gap suggests the presence of structural problems regarding social norms, gender stereotyping and potential discrimination that affects the wage gap. Third, we show that both at a national and regional level, gender wage gaps are larger within the lowest percentiles, and they mostly have a downward slope across the earnings distribution. Finally, after computing the raw and unexplained gap at the region-year level, we show that smaller regional gender gaps are associated with (a) higher GDP, (b) lower levels of domestic physical violence against women, and (c) lower percentages of women as household heads.

Keywords
gender discrimination; gender inequality; gender wage gap; Peru; regional inequality

Issue
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1. Introduction

Over the last two decades, Peru has been one of the growth leading economies in Latin America, with an annual average GDP growth of 5.3%, largely outperforming most of its regional peers (International Monetary Fund, 2020). Moreover, during this period, women were able to achieve important human capital gains: By 2018, the proportion of women with higher education was already greater than that of men (12% vs. 10%), which represents a substantial improvement considering the long-lasting gender inequalities that Latin America has faced as a society. Despite these gains in human capital accumulation, there are notorious barriers that women still face in the Peruvian labour market (Barrantes & Matos Trifu, 2019; Vargas, 2014).

Our study aims to analyse gender wage disparities in Peru between 2007 and 2018. Peruvian gender wage and employment gaps experienced a sharp decrease during the 70s and 90s (MTPE, 2006; Ñopo, 2009), and in terms of the overall economic participation and opportunity index, Peru ranks 90 out of 153 countries, placing 60% among Latin American and the Caribbean countries. However, in terms of wage equality for similar work, Peru ranks 128 out of 153 countries, being one of the most unequal countries in the region (WEF, 2020, p. 285). In this article, we construct a measure of the unexplained wage gap that takes into account the notion of equal

wage for similar work, thus building the unexplained wage gap as the difference between men and women's raw wages that cannot be explained by differences in observable human capital, sociodemographic characteristics, or occupation.

This article builds on previous work by providing a better understanding of gender inequality in Peru in four different ways. First, we update the analysis of the gender wage gaps in Peru using recent data covering 2007 to 2018. To the best of our knowledge, Ñopo (2009) was the most recent study about the evolution of the Peruvian gender wage gap and comprised a period between 1980 and 2000. We find that the raw wage gap showed an upward trend between 2007–2011, ranging from 6% to 12%, and remaining around that top bound ever since. On the other hand, the unexplained wage gap (also called "adjusted gap") has remained virtually unchanged at around 17% during the analysis period, with only minor reductions between 2011 and 2018.

Second, after having quantified the size of the gender wage gaps, we investigate the drivers of these differences. We focus on how particular variables related to human capital accumulation (e.g., education, tenure) may contribute or attenuate the observed gender wage gaps. In contrast to other work, our data also allows us to explore the role of sectoral activity and occupation on these gender gaps. Furthermore, we also account for the potential effect of non-random selection on the observed gaps.

Third, we investigate gender wage differences across the wage distribution. By employing a large cross-section panel, we can identify compositional shifts in the unexplained gap for different quantiles over time. Besides Carrillo et al. (2014) and Del Pozo Segura (2017), there is very limited evidence on how the gender gap behaves across the wage distribution. We provide evidence that the most vulnerable workers are consistently exposed to higher unexplained wage differences. This includes the ones positioned at the lowest tails of the income distribution, such as informal workers, and those least educated.

Finally, to the best of our knowledge, this is the first study that computes gender wage differentials at a Peruvian regional level. We shed light on the regional heterogeneities on the raw and unexplained gender gaps and how they have evolved over time. This is particularly relevant considering the sharp differences between Peruvian regions in terms of socioeconomic characteristics, idiosyncratic beliefs, and economic composition. We find that smaller regional gender gaps are associated with higher GDP, a higher percentage of women as household heads and lower levels of physical violence against women.

2. Data

This study uses individual-level data from the Peruvian National Household Survey (ENAHO) for the period between 2007 and 2018. ENAHO is a representative annual national and regional survey, conducted by the National Institute of Statistics (INEI). This survey collects detailed individual information on education, employment, income, and expenditures, and it covers both urban and rural areas in all 25 regions. A full description of the variables used in the analysis is detailed in Table 1.

The sample of the study is restricted to individuals between 18 and 65 years of age and it excludes those who are unemployed, retired, and self-employed. Although self-employment constitutes an important part of the Peruvian labour market (about 50% of the total labour force), it was excluded from the analysis because of the highly heterogeneous types of self-employment work in Peru. The reasons behind choosing self-employment are very diverse from having an economic need, wanting to work independently, not finding a dependent job, family tradition, among others (INEI, 2019, p. 175) and thus the non-observable characteristics of people who choose self-employment are also very diverse. Therefore, from an estimation point of view, including these types of workers would require us to model selection into self-employment that is beyond the scope of this article. Finally, for each year, we trim individuals lying in the first or last percentile of the wage distribution to avoid conclusions being distorted by outliers. The total pooled sample consists of 250,000 observations.

Table 2 displays summary statistics in the initial and last study periods of our analysis. We find persistent and significant gender differences in hourly wages and educational attainment between 2007 and 2018. Men have higher wages than women even when controlling for hours worked. Both of them have accumulated more years of education over time; nonetheless, as in other countries, working women exhibit more years of education compared to men. In terms of firm size, female and male representation is very similar across the board; nevertheless, a higher percentage of women work in bigger firms, while a higher percentage of men in smaller ones (see, for example, participation differences within the 1–5 and 51–500+ firms). Finally, the prevalence of informal work is higher among men than women in our sample due to the exclusion of self-employed workers from the study. A characteristic of self-employed work is that it is more prevalent among men than women and is mainly informal work.

3. Methodology

3.1. Base Estimations

To understand which factors drive the gender wage differentials, we employ the Oaxaca (1973) and Blinder (1973) decomposition (O–B) method. We follow the extension of O–B proposed by Fortin (2008), which estimates a Mincerian wage equation for men (m) and women (f) separately. The form of the regressions is given by the following equation:

$$w_g^t = \beta_g^t X_g^t + \varepsilon_g^t \ldots \quad (1)$$

Table 1. Variables description.

Variable	Description
Log of hourly wage	Natural logarithm of main occupation hourly wage
Sex	Dummy that takes the value of 1 if the person is female, 0 otherwise
Age	Age in years
Tenure	Years of tenure in the current main occupation
Urban	Dummy that takes the value of 1 if the person lives in an urban area, 0 otherwise
Public Sector	Dummy that takes the value of 1 if the person works in the Public Sector, 0 otherwise
Informal	Dummy that takes the value of 1 if the person is an informal worker, 0 otherwise
Years of schooling	Number of years of education
Household head	Dummy that takes the value of 1 if the person refers in the survey as the household head, 0 otherwise
Indigenous mother tongue	Dummy that takes the value of 1 if the person's mother tongue is referred to as Quechua, Aymara, or Amazonian native, 0 otherwise.
Categorical variables	
Size of the firm	5 categories in terms of number of workers (1–20; 21–50; 51–100; 101–500; 500+)
Region	Geopolitical regions: 25 categories
Industry	Economic sector of the worker's firm: 18 categories
Occupation	Main occupation of the worker within the firm: 436 categories. We employ the National Occupation Classification provided by the INEI (2016).

Notes: Hourly wage includes in-kind payments and bonuses and is constructed using reported hours worked; workers are defined as informal if they are not covered by the social security system or if their employer is not registered in the National Tributary System; size of the firm, region, industry, and occupation are included in the analysis as a set of dummies, one per variable category.

Here, w_g^t is the log hourly wage and X_g^t constitutes a vector of observable characteristics (listed in Table 1). This vector also includes the occupation and industry dummies. The error term is given by ε_g^t. Finally, subscript t represents the year where the observation is collected and superscript g defines gender group (m, f) in which the estimation is evaluated.

Considering this specification, the O-B decomposition for year t is given by:

$$\overline{w}_m^t - \overline{w}_f^t = \hat{\beta}_m^t \left(\overline{X}_m^t - \overline{X}_f^t\right) + \overline{X}_f^{t'} \left(\hat{\beta}_m^t - \hat{\beta}_f^t\right) \ldots \quad (2)$$

The difference in the left-hand side refers to the observable mean wage gap between men and women. The first term on the right-hand side of equation 2 accounts for observable differences in endowments (also known as "quantity effect"), while the second term of the right-hand side is attributable to differential returns to those endowments (also known as "price effect").

3.2. Machado-Mata Quantile Decomposition

Although average gender wage gaps provide a broad overview of the gender inequality in the market, significant heterogeneities across the wage distribution could be present (Albrecht et al., 2009; Badel & Peña, 2010; Christofides et al., 2013). This applies both to observable raw and unexplained wage gaps. We use the Machado and Mata (2005) approach (MM) which estimates Mincerian equations for each quantile (θ), conditional on the set of control variables. These quantile regressions are estimated individually for men and women, producing vectors $\hat{\beta}_{m,\theta}$ and $\hat{\beta}_{f,\theta}$ for each quantile θ, respectively.

The key idea of MM is based on estimating two counterfactual densities to decompose the observed wage gap. The first counterfactual density is formed by the female log wage density that would prevail if women retained their characteristics but were paid according to prices derived from the male sample regression. The second counterfactual is given by the female log wage density that would prevail if women were endowed with men's observable characteristics but were paid according to prices derived from the female sample regression.

Analogous to the O–B approach, we could express the MM decomposition (evaluated at the quantile θ) with simplified two-alternative counterfactual distributions:

$$\overline{w}_{m,\theta}^t - \overline{w}_{f,\theta}^t = \hat{\beta}_{m,\theta}^t \left(\overline{X}_m^t - \overline{X}_f^t\right) + \overline{X}_f^{t'} \left(\hat{\beta}_{m,\theta}^t - \hat{\beta}_{f,\theta}^t\right) \ldots \quad (3)$$

In addition, we use the Chernozhukov et al. (2013) extension to compute asymptotic standard errors.

4. Results

4.1. Aggregate Results

Figure 1 graphs the evolution of the raw, unexplained, and explained gender wage gap between 2007 and 2018. This figure shows that during this period, male raw

Table 2. Descriptive statistics.

	2007			2018		
	Mean (M)	Mean (F)	Diff. (M–F)	Mean (M)	Mean (F)	Diff. (M–F)
Ln (hourly wage)	1.64	1.52	0.11***	1.99	1.88	0.11***
	(0.01)	(0.01)	(0.02)	(0.01)	(0.01)	(0.01)
Age	36.10	35.45	0.65**	37.73	36.82	0.91***
	(0.16)	(0.21)	(0.26)	(0.15)	(0.18)	(0.23)
Education						
Primary	1.23	1.16	0.06***	1.92	1.81	0.11***
	(0.01)	(0.02)	(0.02)	(0.01)	(0.01)	(0.01)
Secondary	35.17	34.19	0.97***	37.61	36.65	0.95***
	(0.16)	(0.21)	(0.26)	(0.15)	(0.18)	(0.23)
Tertiary	1.23	1.16	0.06***	1.92	1.81	0.11***
	(0.01)	(0.02)	(0.02)	(0.01)	(0.01)	(0.01)
Years of schooling	10.85	11.90	−1.06***	11.39	12.03	−0.64***
	(0.05)	(0.08)	(0.09)	(0.04)	(0.06)	(0.07)
Children number	2.16	2.15	0.02	1.88	1.85	0.03
	(0.02)	(0.03)	(0.03)	(0.02)	(0.02)	(0.02)
Married	0.59	0.44	0.15***	0.57	0.42	0.14***
	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)
Living in urban area	0.13	0.08	0.05***	0.10	0.07	0.03***
	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)	(0.00)
Public sector worker	0.16	0.27	−0.11***	0.15	0.24	−0.09***
	(0.00)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Tenure (years)	4.61	4.86	−0.25	5.29	4.85	0.44***
	(0.10)	(0.14)	(0.17)	(0.09)	(0.11)	(0.15)
Firm size						
1–5 workers	0.27	0.25	0.02**	0.30	0.28	0.02**
	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)
6–10 workers	0.30	0.25	0.05***	0.30	0.29	0.02**
	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)
11–50 workers	0.14	0.12	0.02***	0.11	0.11	0.01
	(0.00)	(0.01)	(0.01)	(0.00)	(0.00)	(0.01)
51–500 workers	0.17	0.17	−0.00	0.17	0.15	0.01
	(0.00)	(0.01)	(0.01)	(0.00)	(0.01)	(0.01)
Informal worker	0.40	0.46	−0.07***	0.42	0.45	−0.04***
	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)	(0.01)
Observations	9,437	4,737		14,194	9,283	

Notes: This table uses ENAHO sampling weights; data on wages is originally expressed in monthly current Peruvian soles (PEN); we divide it by the number of hours worked in the main occupation and use the exchange rate PEN to USD (on each survey year) to express hourly wage in USD; standard errors in parenthesis; * $p < 0.1$; ** $p < 0.05$; *** $p < 0.01$.

average wages were about 10% higher than those of females. From 2007 to 2011, the raw gender wage gap was slightly lower (about 8%) but increasing. From 2012 to 2018, the raw gap stabilised at about 10%. During this period, the unexplained wage gap was steady at around 17%, with only a minor decrease between 2010 and 2012. In contrast to previous studies, our results show a substantive smaller Peruvian unexplained wage gap. For example, Ñopo (2009) found an unexplained gender wage gap of 28% for the period between 1986 and 2000. Despite the possibility of these results not being completely comparable with ours because we exclude independent workers—for which prior studies have found the gap been larger (Beltrán et al., 2021)—and Ñopo (2009) employs a matching-based technique, our numbers align with similar trends regarding the evolution of gender wage gaps in the Latin American region (Atal et al., 2009; Boraz & Robano, 2010).

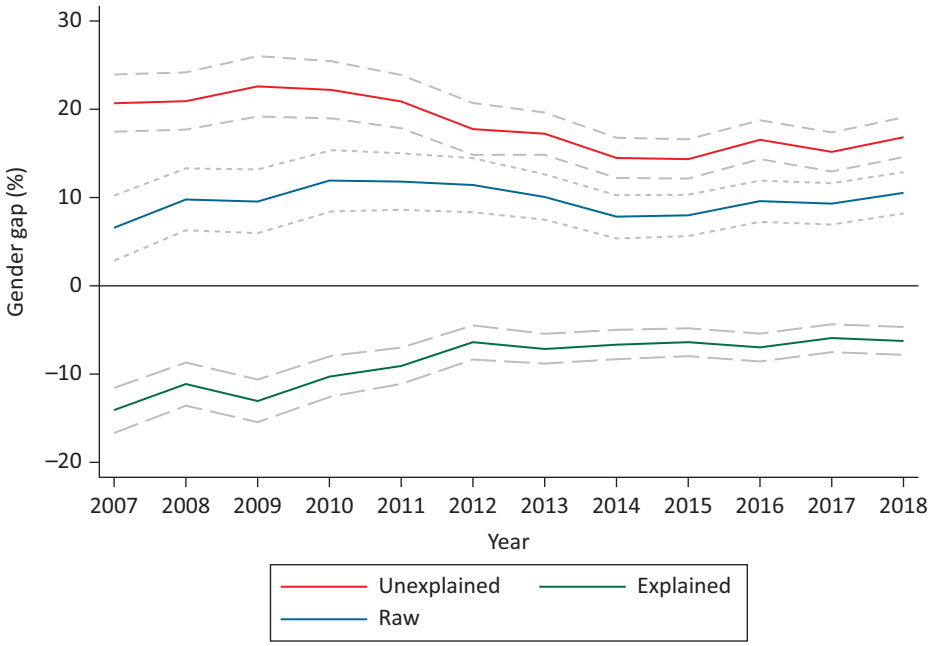

Figure 1. Wage gap decomposition. Notes: Raw gender wage gap is measured as ln(wage men)—ln(wage women); solid lines refer to point estimates; dashed lines denote 95% confidence intervals.

Table 3 reports the estimated results from the O–B decomposition performed for the years 2007, 2011 and 2018. The first two rows show the mean raw hourly wage for men and women, respectively. Explained and unexplained gender wage gaps are observed in the fifth and eighth row, respectively. The contribution of education, tenure, age, activity sector, and occupation to each gender wage gap are also shown in this table. Although other controls are included (detailed in table note), we only report the contribution of variables that explain most of the size of the wage gaps.

On average, between 2007 and 2018, the unexplained wage gap was around 17%. This gap could be interpreted as men, with similar human capital and sociodemographic characteristics, earning 17% more than their female peers. On the other hand, the explained gender wage gap ranges between −15% and −6%. The negative sign of this gap can be interpreted as the attenuation effect that control variables included in the decomposition have on the raw wage gap, therefore, pointing towards employed women having better working characteristics than employed men. Furthermore, Figure 1 and Table 3 show that the unexplained wage gap has slightly reduced between 2007 and 2018 (approx. −4 p.p.), while the explained gap shrunk by about 9 pp (from −15% to −6%). This suggests that the endowment difference between men and women (i.e., in terms of education, experience, tenure, and other controls used in the regression) reduced during this period, and therefore women in the Peruvian labour market are now more similar to men in terms of human capital and socio-demographic characteristics. Less attenuation effect through the explained component coupled with a stagnant unexplained gap—which is plausible considering the challenge in changing idiosyncratic beliefs—could have led to slightly larger raw wage gaps over time. These results are consistent with previous studies that have focused on the trend of gender wage gaps, such as González et al. (2005) and Shi et al. (2011), which also found smaller attenuation effects over time through the explained component, indicating that the gap between male and female human capital and employment characteristics was narrowing.

We find that for every reported year, education explains between 3 to 5 (negative) percentage points of the explained component, pointing towards a better education endowment in working women. Conversely, we find that, as shown in the literature, occupations and industries explain the observed gender gap (between +3 p.p. and +5 p.p.), confirming that men are consistently allocated to more profitable industries than women. Interestingly, as suggested by Neumark and Vaccaro (2020), once we account for the working sector, there are no effects through occupation composition. While the unexplained gender wage gap is always positive and statistically significant, both education and tenure contribute negatively to the unexplained component, attenuating the overall gap. As expected, most of the variables that size the unexplained component are in the constant term. This suggests that unexplained wage differentials operate mainly through non-observable characteristics, such as cultural practices in the firm, personal skills, and potentially gender discrimination.

Acknowledging that our decompositions do not account for endogenous labour participation decisions, we use a Heckman (1979) correction model into our O–B decomposition. We use standard instrumental variables used in similar literature: children under 6 years, children

Table 3. Oaxaca-Blinder decomposition.

	2007	2011	2018
(1) Mean: Ln(hourly wage) for men	1.23	1.58	1.92
	(0.01)	(0.01)	(0.01)
(2) Mean: Ln(hourly wage) for female	1.16	1.46	1.81
	(0.02)	(0.01)	(0.01)
Mean [(1)–(2)]	0.06	0.12	0.11
	(0.02)	(0.02)	(0.01)
Explained component	−0.15***	−0.09***	−0.06***
	(0.01)	(0.01)	(0.01)
Education	−0.05***	−0.04***	−0.03***
	(0.00)	(0.00)	(0.00)
Tenure	−0.00*	−0.00	0.00***
	(0.00)	(0.00)	(0.00)
Age	0.00	−0.00	−0.00
	(0.00)	(0.00)	(0.00)
Industry	0.03***	0.05***	0.04***
	(0.01)	(0.01)	(0.01)
Occupation	−0.01	−0.00	−0.00
	(0.01)	(0.01)	(0.00)
Unexplained component	0.21***	0.21***	0.17***
	(0.02)	(0.02)	(0.01)
Education	−0.18***	−0.17***	−0.13***
	(0.06)	(0.06)	(0.04)
Tenure	−0.06***	−0.02**	−0.03***
	(0.01)	(0.01)	(0.01)
Age	−0.24	0.03	0.16
	(0.15)	(0.14)	(0.11)
Industry	−0.02	−0.02	−0.03
	(0.04)	(0.04)	(0.03)
Occupation	0.01	−0.03	−0.06***
	(0.02)	(0.02)	(0.01)
Constant	0.801***	0.30	0.38***
	(0.201)	(0.199)	(0.146)
Total obs.	14,173	15,893	23,477

Notes: All decompositions include controls such as education, native tongue, age, tenure, private sector and firm size, occupation, economic activity, and regional fixed effects; the explained and unexplained components are read as percentage points contributions to the raw wage gap; robust standard errors in parenthesis; *** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$.

between six and 17 years of age, marital status, other household member's income, and head of household (Albrecht et al., 2009; Blau & Beller, 1988; Piazzalunga & Di Tommaso, 2019). After correcting for the participation decision, we find two main results regarding the gender gap. On the one hand, the raw wage gap increased from 7% to 22% between 2007 and 2018 in comparison to 6% to 12% when we do not correct for self-selection, almost doubling its size. We refer to this gap in Table 4 as the adjusted raw wage gap. To provide a graphic overview of the gender wage differences adjusted by the Heckman correction, Figure 2 plots in Panel A the raw wage gap using estimations from the baseline model, and Panel B using the Heckman-corrected estimations. This evidence suggests the presence of a positive sample selection effect: More educated and experienced women are those who mainly decide to participate in the labour market. Otherwise, if there were no participation gaps, the raw gap observed would be roughly twice as large as the current one. The direction of this correction is well documented. Similar results have been found for countries such as Colombia, Mexico, the UK, and the Netherlands (Albrecht et al., 2009; Badel & Peña, 2010; Chzhen & Mumford, 2011). On the other hand, evidence

Table 4. Heckman-adjusted Oaxaca-Blinder decomposition.

	2007	2011	2018
(1) Mean: Ln(hourly wage) for men	1.24	1.65	1.98
(2) Mean: Ln(hourly wage) for female	1.17	1.41	1.76
Adjusted raw gap [(1)–(2)]	0.07	0.24	0.22
Explained component	−0.09***	−0.05***	−0.02***
	(0.02)	(0.02)	(0.01)
Education	−0.05***	−0.04***	−0.03***
	(0.00)	(0.00)	(0.00)
Tenure	−0.00*	−0.00*	0.00*
	(0.00)	(0.00)	(0.00)
Unexplained component	0.16***	0.17***	0.13***
	(0.02)	(0.02)	(0.02)
Education	−0.17***	−0.16***	−0.15***
	(0.06)	(0.07)	(0.05)
Tenure	−0.06***	−0.02***	−0.03***
	(0.01)	(0.01)	(0.01)
III. Sample selection	−0.01	−0.12	−0.12
	(0.07)	(0.08)	(0.04)
Total obs.	14,173	15,893	23,477
R2: male selection eq.	0.13	0.13	0.15
R2: female selection eq.	0.22	0.19	0.23

Notes: All decompositions include controls such as education, native tongue, age, tenure, private sector and firm size, occupation, economic activity, and regional fixed effects; the explained and unexplained components are read as percentage point contributions to the raw wage gap; robust standard errors in parenthesis; *** p < 0.01, ** p < 0.05, * p < 0.10.

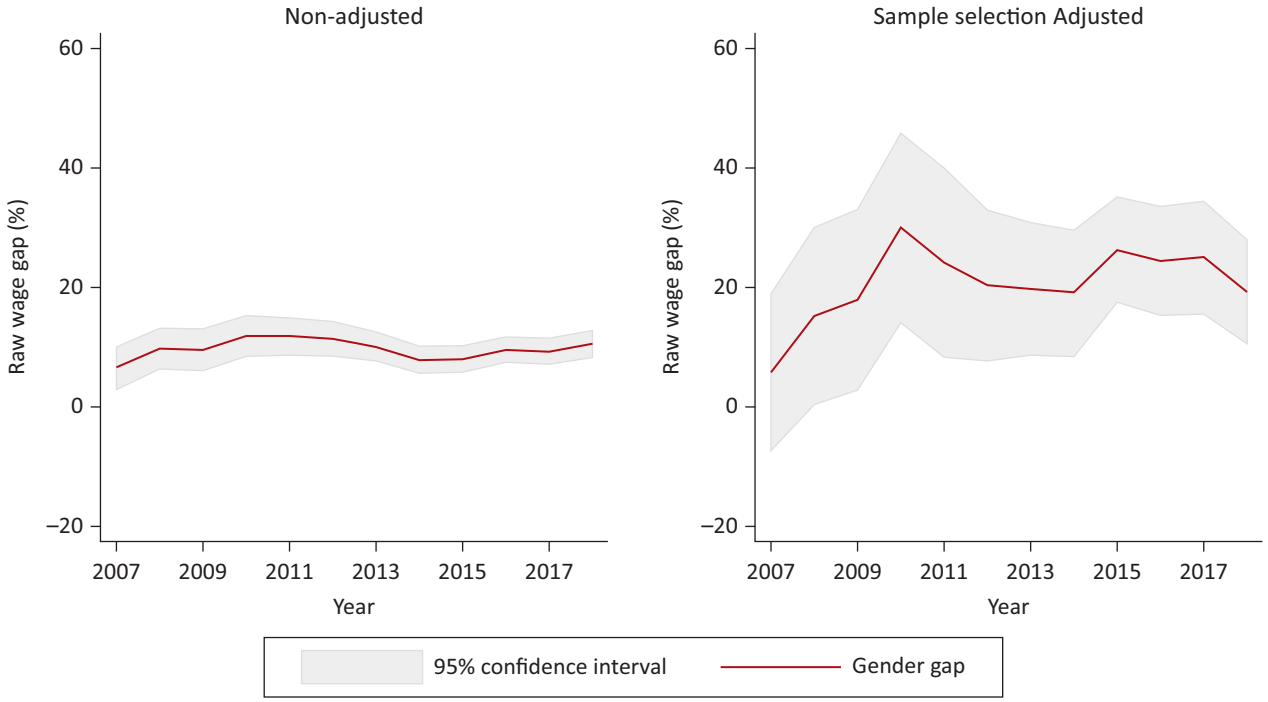

Figure 2. Raw wage gap vs. raw wage adjusted by sample selection. Notes: The dependent variable is measured as the ln(hourly wage) in the main occupation; first-step Heckman estimations include as instruments: number of children under six years of age, children between six and 17 years of age, marital status, other household member's income, and head of household.

shows that the explained and unexplained wage gaps do not change much by correcting for endogenous selection into the labour force.

4.2. Gender Wage Gaps Across Different Subgroups

To identify key differences that might drive heterogeneous gender wage gaps in Peru, we analyse four main population subgroups: (a) educational attainment, (b) age (as a proxy of potential experience), (c) private vs. public sector, and (d) formal vs. informal employment. We concentrate on the analysis of unexplained wage differences across these categories. Figure 3 plots the results. Four key findings are worth highlighting.

First, we show that, in Peru, the unexplained gender wage gap is consistently higher among people with the lowest level of educational attainment. This finding is aligned with international evidence, largely documented in the literature (Blau & Beller, 1988; Hughes & Maurer-Fazio, 2002). The increase of educational credentials acts as a screening mechanism, attenuating the arbitrary components attributed to discrimination practices. Second, there are not many unexplained gender wage gap differences across people with age groups. As shown for the average population, the unexplained wage gap for each cohort has remained stable at about 15%. The only age group that consistently has a lower unexplained wage gap is the older group (43 and older), this result may be a reflection of differences in children's ages among the first two groups in comparison to the latter being that younger children (especially under five) demand more care. Third, the unexplained wage gap is persistently higher in the private than in the public sector (17% vs. 9%, respectively, for the whole period). Studies argue that this situation occurs because the public sector usually has more accountability measures and transparency labour rules that allow them to implement equal opportunity and anti-discrimination policies (Antón & Muñoz de Bustillo, 2015). Fourth, besides more women working in the informal sector, the unexplained gender wage gap against female workers is also more pronounced (22%). In summary, we show that women in greater vulnerability conditions (less educated and informal) have higher unexplained wage gaps than other groups, reflecting a greater disparity in terms of wage gap.

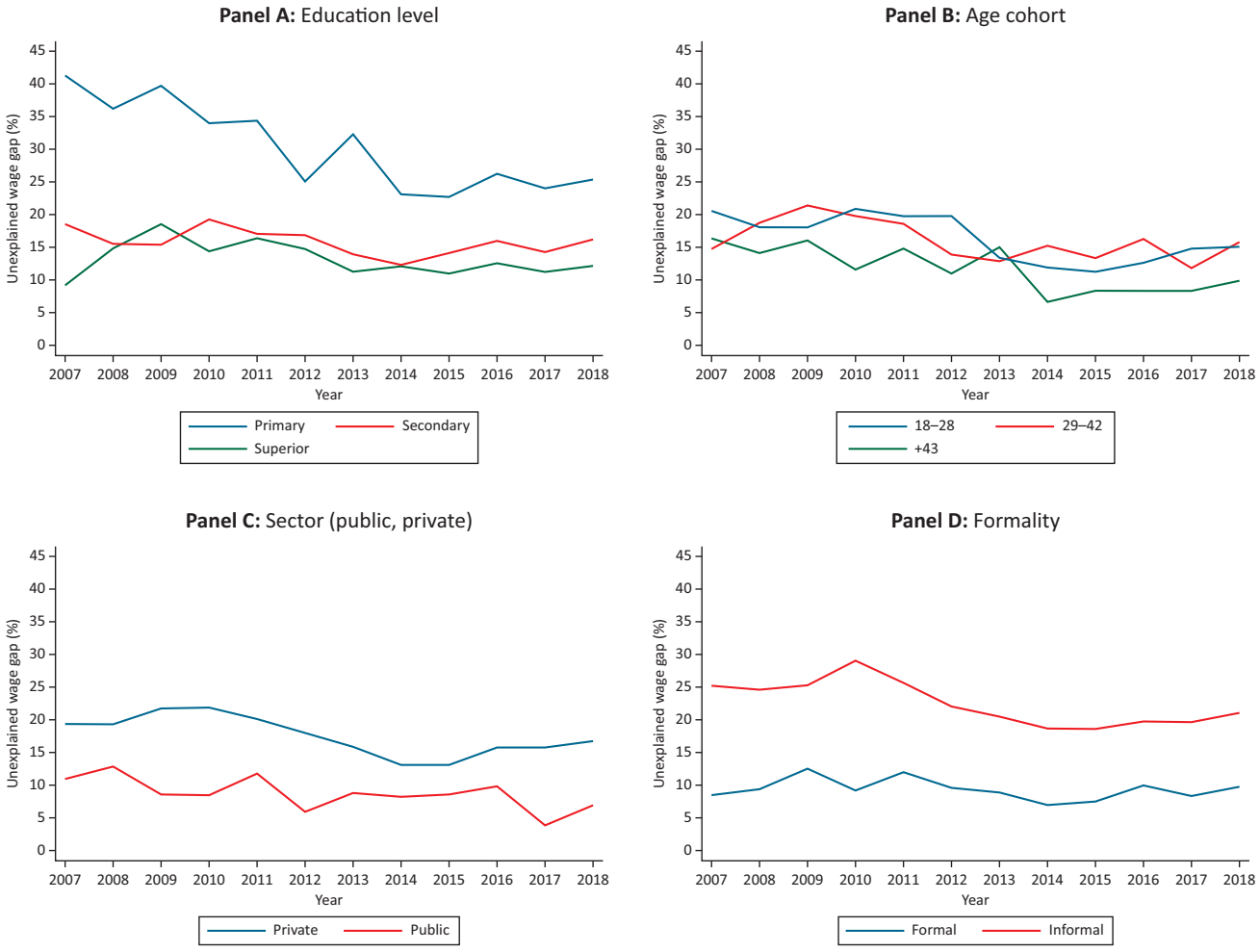

Figure 3. Unexplained wage gap across subgroups. Notes: All decompositions include controls such as education, native tongue, age, tenure, private sector and firm size, occupation, economic activity, and regional fixed effects.

4.3. Quantile Decomposition Results

Table 5 reports the quantile decomposition results using MM at five specific percentiles (10, 25, 50, 75, and 90) for three referential years (2007, 2011, and 2018). In line with previous research (Carrillo et al., 2014; Del Pozo Segura, 2017; Ñopo, 2009), we find that both gender wage gaps are considerably larger at the lowest percentiles for the evaluated period. When looking at changes over time, we find that the unexplained wage gap has reduced the most among the two lowest quantiles (around 9 pp). This result is consistent with the analysis done for informal and less-educated workers in Figure 3, where the unexplained gap also decreased more among the most vulnerable groups. The greater reduction of the unexplained gap among the lowest quantiles may be associated with different factors. First, it could be driven by a greater increase in endowments among these groups; for example, more human capital that can explain a larger proportion of the observed wage, thus leaving a smaller portion to the unexplained component. Second, it could be related to an increase in the returns to endowments for women. Unfortunately, our methodology does not provide a direct way of testing these drivers.

4.4. Regional Gender Wage Differences

Peru has been historically a very heterogeneous country in terms of regional development and socio-economic conditions. Authors such as Seminario et al. (2019) and Castillo (2020) have shown evidence of large heterogeneities in income evolution across regions. While our study does not aim to point out any causal evidence about regional heterogeneities, descriptive evidence about gender wage differences, between and within regions, can help to identify key features that might affect regional disparities in terms of the gender wage gap. In this section, we present the average raw and unexplained wage gaps for 25 geopolitical regions, grouped into 8 macro-regions: Northern Coast, Centre Coast, Southern Coast, Northern Sierra, Centre Sierra, Southern Sierra, Forest, and Lima. We employ macro-regions instead of individual geopolitical departments as it allows for including a larger number of sector-occupation fixed effects. Otherwise, the small number of observations for a single department could comprise the estimation of the unexplained gaps (most likely underestimated) if certain sector-occupations regressors are not included due to a lack of degrees of freedom.

Panels A and B in Figure 4 show the average regional raw wage gap for the periods 2007–2010 and 2011–2018, respectively. We point at two findings. First, there is a considerable degree of heterogeneity across macro-regions with the highest raw gaps surpassing 20%. Remarkable examples are the Forest region with negative raw gaps during 2007–2010 and close to zero during 2011–2018. The Andean regions (mainly Southern and Centre Sierra) average a gender wage gap of over 20% during both periods. Second, there are no significant changes over time in terms of raw gap (See Table 6). Similarly, Panels C and D show the average unexplained wage gap for the corresponding periods. As in the case of the raw gap, the unexplained gap in Peru is heterogeneous across regions: It ranges from 12% in Lima to 27% in Centre Sierra, and it is always positive. By comparing two periods of analysis, we notice subtle differences, despite observing that most regions have reduced their average unexplained gap.

Table 5. Machado-Mata quantile decomposition.

	p10	p25	p50	p75	p90
(A) Raw gap					
2007	0.35***	0.16***	0.04*	−0.09***	−0.09***
	(0.02)	(0.02)	(0.02)	(0.03)	(0.3)
2011	0.27***	0.18***	0.10***	0.02	0.03
	(0.03)	(0.02)	(0.02)	(0.02)	(0.03)
2018	0.21***	0.15***	0.10***	0.04*	0.00
	(0.02)	(0.01)	(0.01)	(0.02)	(0.02)
(B) Unexplained gap					
2007	0.39***	0.23***	0.16***	0.06***	0.05**
	(0.02)	(0.02)	(0.02)	(0.02)	(0.03)
2011	0.29***	0.21***	0.16***	0.12***	0.10***
	(0.03)	(0.02)	(0.02)	(0.02)	(0.03)
2018	0.18***	0.13***	0.13***	0.13***	0.08***
	(0.02)	(0.01)	(0.01)	(0.02)	(0.02)

Notes: All decompositions include controls such as education, native tongue, age, tenure, private sector and firm size, occupation, economic activity, and regional fixed effects; repetition parameter in the MM is set to 100; robust standard errors in parenthesis; *** $p < 0.01$, ** $p < 0.05$, * $p < 0.10$.

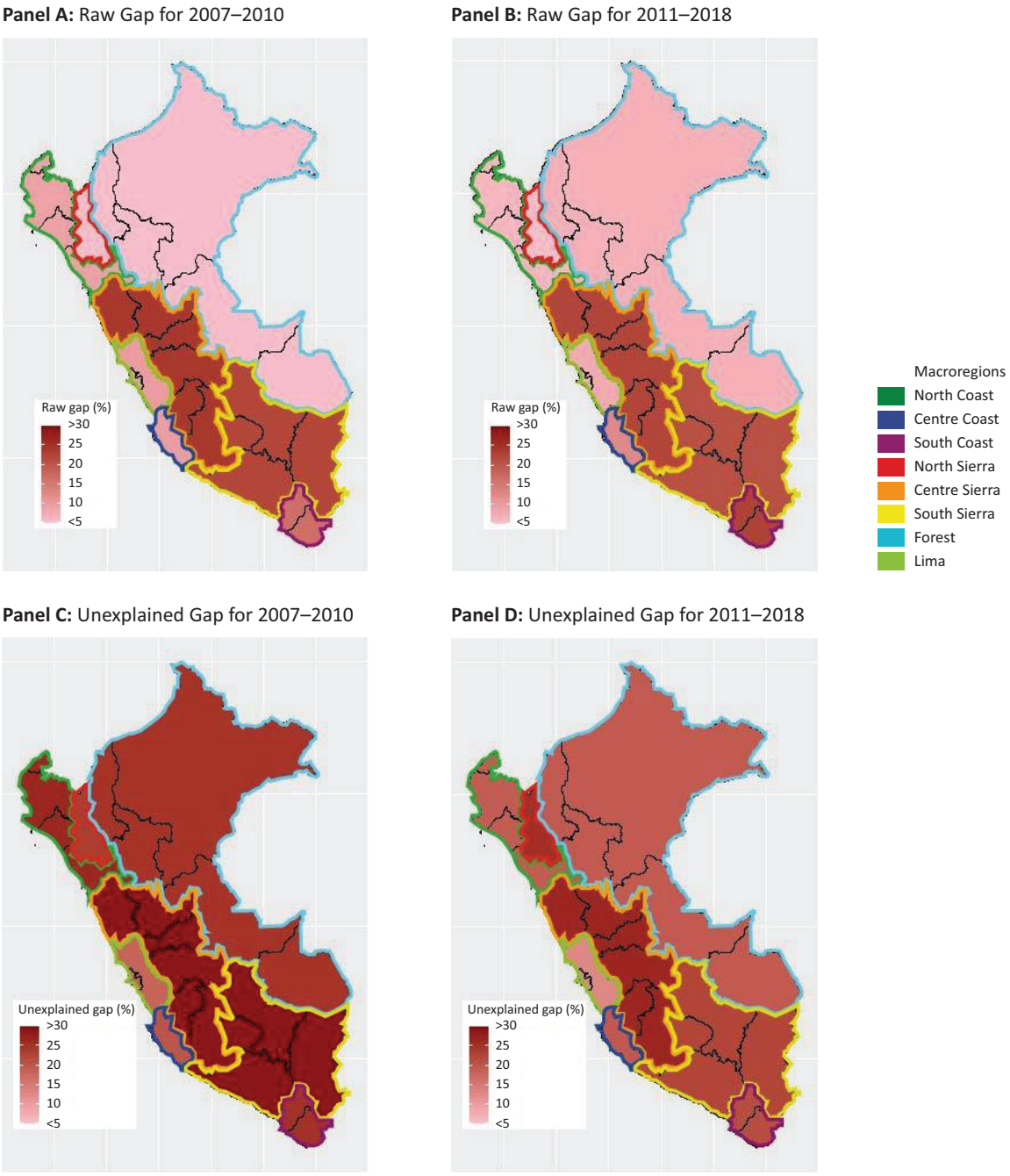

Figure 4. Average raw and unexplained wage gaps across macro regions. Notes: Raw gender gaps are computed using the ln (hourly wage) separately for each macro region; data included has been weighted using sampling weights from the ENAHO survey; unexplained gaps are computed using the base O-B decomposition.

Following a similar procedure to Piazzalunga and Di Tommaso (2019), we statistically test whether overall regional gender gaps have changed significantly between the two periods of analysis. We found no statistical differences in the average raw wage gap for most regions (with the noticeable exception of Northern Sierra), as shown by Table 6. We also decompose the changes in the raw gap into changes in the explained and unexplained components, which matches with the observed changes in Figure 4. As suggested previously, some of the regions show reductions in the unexplained wage gap over time (ranging from −8 p.p. to +3 p.p., widening the latter). Nonetheless, these regional changes in isolation may not account for a significant change in the national trend. Moreover, the reductions in the unexplained component are offset by an increase of the explained wage gap in every macro-region (ranging from +3 p.p. to +12 p.p.). These translate into a rather stable raw wage gap over time and across most macro-regions.

We also test for regional gap heterogeneities over the earnings distribution. For each macro-region, we perform the MM decomposition using the complete sample

Table 6. Intertemporal wage gap decomposition, by macro-regions.

	Northern Coast	Centre Coast	Southern Coast	Northern Sierra	Centre Sierra	Southern Sierra	Forest	Lima
Raw gender gapp. 2011–2018	0.06***	0.13***	0.23***	0.02	0.23***	0.21***	0.07***	0.08***
	(0.01)	(0.01)	(0.02)	(0.03)	(0.01)	(0.01)	(0.01)	(0.01)
Raw gender gapp. 2007–2010	0.09***	0.10***	0.17***	−0.12***	0.25***	0.23***	0.05**	0.10***
	(0.02)	(0.02)	(0.03)	(0.05)	(0.02)	(0.03)	(0.02)	(0.02)
Ch. in raw gender gap (pp.)	−0.03	0.03	0.07*	0.15***	−0.02	−0.01	0.03	−0.02
	(0.02)	(0.02)	(0.04)	(0.05)	(0.03)	(0.03)	(0.02)	(0.02)
Due to ch. in exp. gap (pp.)	0.03	0.03	0.07**	0.12**	0.04	0.07***	0.07***	0.03***
	(0.02)	(0.02)	(0.03)	(0.05)	(0.02)	(0.02)	(0.02)	(0.01)
Due to ch. in unex. gap (pp.)	−0.06***	0.00	−0.00	0.03	−0.05**	−0.08***	−0.05*	−0.05**
	(0.02)	(0.02)	(0.03)	(0.04)	(0.02)	(0.02)	(0.02)	(0.02)

Notes: All decompositions are estimated separately for each macro region and include controls such as education, native tongue, age, tenure (in main occupation), private sector and firm size, as well as occupation, economic activity; robust standard errors in parenthesis; *** p < 0.01, ** p < 0.05, * p < 0.10.

(i.e., observations from 2007 to 2018) but controlling for the year of each survey wave and using real wages. Results are displayed in Figure 5. We highlight some noteworthy ones. First, we observe similar downward slope gaps for most regions, both in the raw and unexplained gender differentials. This finding is in line with our aggregate results, pointing out a consistent outcome: Larger gaps are found within the poorest quantiles, independently of the geographic and cultural conditions. However, the magnitude of the gap varies greatly across regions. On the one hand, Andean territories show the largest gender wage gaps at the lowest percentiles, at around 50% (but interestingly, almost 0% at the highest percentiles). On the other end, coastal regions—

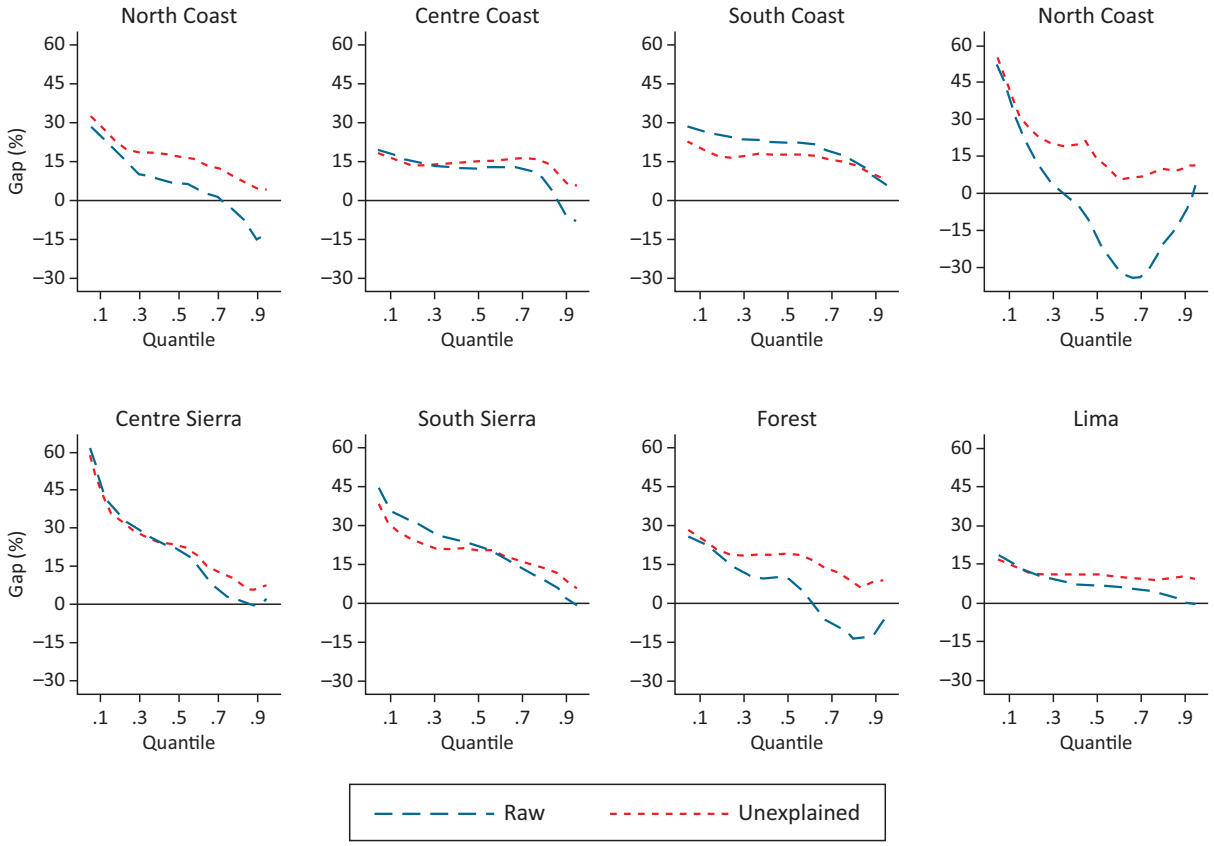

Figure 5. Regional Machado-Mata quantile decomposition. Notes: All decompositions include controls such as education, native tongue, age, tenure, private sector and firm size, occupation, economic activity, and regional fixed effects; the parameter in the MM is set to 100.

including the capital, Lima—are the ones with a less stepped slope, oscillating around a 20% average gap for most of the percentiles. Second, contrary to the national aggregate results, there are few regions (Southern Coast or the Southern Sierra) with raw gaps surpassing their unexplained gaps for some quantiles, revealing important regional differences in observable endowment. For these regions, the human capital endowment for working men is larger than for working women, suggesting these could be regions with stronger structural inequalities in other domains. Recent works such as Fuchs et al. (2021) argue that spatial differences in gender gaps may be related to heterogeneous regional contexts for men and women. These could be, for example, in terms of access to education (in all levels), the ability to engage in the labour market at an early age, and the possibility to participate in well-remunerated sectors. Altogether, these factors could be behind working men having more years of education and work experience for some particular regions. Hints of these structural differences could be seen when comparing urbanity, poverty rates, education and GDP across macro-regions, which are displayed in Table 7.

Afterwards, Table 8 shows the raw and unexplained gap at a region-year level and uses them as dependent variables to run a pooled regression against regional aggregate variables. The method of estimation does not intend to identify causal effects, but instead to shed some light on interesting associations that could help to better comprehend regional differences. The variables analysed were GDP per capita, population size, the macro-regional Gini Index, urbanity rate, the percentage of women who self-reported as household heads, poverty rate, informality rate and domestic physical violence rate towards women. This latter variable considers the proportion of women who suffered from kicking, dragging, strangling, burning and threatening or attacking with a weapon by their partner.

We highlight three main results. First, the GDP per capita consistently has a significant negative relationship with each of the gaps. This indicates that regions with more income and economic development have a lower gender wage gap. Table 7 displays an extreme exemplification of this relationship: the region with the highest GDP per capita, Lima, is the one with the smallest unexplained gap, while the one with the lowest GDP per capita, Centre Sierra, is actually the one with the largest unexplained component. These results are in line with Duflo (2012), who explains a strong and potentially bi-directional relationship between women's empowerment and economic development. Second, the gender physical violence rate widens the raw gap and

Table 7. Summary statistics by macro-regions.

	Northern Coast	Centre Coast	Southern Coast	Northern Sierra	Centre Sierra	Southern Sierra	Forest	Lima
GDP per capita (USD)	1020.17	2103.67	1973.49	873.95	879.61	1205.05	1010.30	3932.48
	(40.50)	(126.68)	(33.77)	(36.22)	(28.11)	(72.54)	(30.34)	(188.42)
Population (in millions)	2.58	1.20	0.38	1.02	2.03	2.37	2.14	5.99
	(0.04)	(0.02)	(0.01)	(0.01)	(0.03)	(0.05)	(0.03)	(0.12)
Gini Index	0.57	0.54	0.50	0.60	0.55	0.54	0.56	0.55
	(0.04)	(0.04)	(0.03)	(0.04)	(0.03)	(0.03)	(0.03)	(0.04)
Urbanity rate	0.88	0.91	0.92	0.36	0.62	0.70	0.64	1.00
	(0.01)	(0.01)	(0.01)	(0.02)	(0.02)	(0.02)	(0.02)	(0.00)
Men's years of education	9.80	10.73	11.00	7.27	9.28	10.33	8.68	11.63
	(0.17)	(0.15)	(0.29)	(0.22)	(0.23)	(0.21)	(0.18)	(0.13)
Women's years of education	9.11	10.09	9.98	5.56	7.40	8.46	7.49	10.10
	(0.25)	(0.30)	(0.32)	(0.32)	(0.35)	(0.28)	(0.22)	(0.25)
Poverty rate	0.25	0.13	0.14	0.55	0.36	0.28	0.33	0.14
	(0.09)	(0.06)	(0.06)	(0.08)	(0.11)	(0.10)	(0.12)	(0.06)
Gender physical violence rate	0.09	0.11	0.15	0.10	0.18	0.22	0.15	0.11
	(0.01)	(0.01)	(0.01)	(0.01)	(0.02)	(0.02)	(0.01)	(0.01)
Women as Household head	0.14	0.18	0.21	0.13	0.16	0.17	0.13	0.17
	(0.00)	(0.01)	(0.01)	(0.01)	(0.00)	(0.00)	(0.01)	(0.01)
Raw wage gap	0.08	0.13	0.22	−0.04	0.23	0.21	0.05	0.08
	(0.05)	(0.03)	(0.06)	(0.11)	(0.04)	(0.07)	(0.05)	(0.04)
Unexplained wage gap	0.21	0.19	0.22	0.22	0.29	0.24	0.21	0.14
	(0.05)	(0.02)	(0.05)	(0.07)	(0.04)	(0.05)	(0.04)	(0.04)

Notes: Standard deviation in parenthesis; we use the exchange rate PEN to USD (on each survey year) to express the GDP per capita in USD.

Table 8. Aggregate regional regressions.

	Raw gap (%)		Unexplained gap (%)	
GDP per capita (in logs)	−0.112***	−0.117***	−0.069***	−0.089***
	(0.030)	(0.032)	(0.022)	(0.022)
Population (in logs)	0.014	0.021	−0.005	0.007
	(0.011)	(0.020)	(0.009)	(0.015)
Gini Index	−0.147	−0.009	0.043	0.068
	(0.477)	(0.562)	(0.354)	(0.382)
Poverty rate (%)	−0.096	−0.042	0.222**	0.166
	(0.145)	(0.178)	(0.108)	(0.143)
Gender physical violence rate (%)	1.086***	1.031***	0.405***	0.233
	(0.139)	(0.243)	(0.105)	(0.167)
Urbanity rate (%)	−0.127	−0.162	−0.127	−0.042
	(0.100)	(0.148)	(0.082)	(0.128)
Informality (%)	−0.169	−0.102	−0.053	−0.134
	(0.249)	(0.327)	(0.202)	(0.249)
Women as Household Head (%)	1.968***	2.547***	0.657*	1.303**
	(0.463)	(0.833)	(0.346)	(0.602)
Observations	88	88	88	88
R-squared	0.734	0.756	0.530	0.604
Time Fixed Effects	No	Yes	No	Yes

Notes : Observations are set at a region-year level; robust standard errors in parenthesis; *** p < 0.01, ** p < 0.05, * p < 0.10.

unexplained wage gaps. This is a particularly relevant relationship to explore in Peru considering that seven out of ten women have experienced some type of violence by their current or prior partners, and recent evidence suggests that geographic conditions may be more relevant than individual characteristics at predicting gender violence (Hernández et al., 2018). As displayed by Table 7, Southern Sierra and the Centre Sierra are the regions with the highest gender physical violence rate, as well as the highest unexplained gaps. This might suggest that cultural practices are an important factor behind gender wage differences in the macro-regions. There are two main mechanisms through which labour outcomes and domestic violence could be negatively associated. According to the theory of exposure, incrementing individual employment will reduce domestic violence by reducing the time partners spend together; and according to household bargaining theory, an increase in a woman's relative wage raises her power position and lowers the levels of violence in the household (Aizer, 2010; Zhang & Breunig, 2021). However, the backlash effect posits a positive relationship between gender physical violence and labour outcomes (Hornung et al., 1981; Macmillan & Gartner, 1999). Our estimates are in line with the household bargaining model. Finally, we document the significant and positive association between the presence of Women as Heads of the Household and gender wage gaps. In principle, it could be logical to expect a negative relationship, considering being a household head could be read as having a stronger power position with respect to her partner. However, in Peru, 65.8% of the households with women as the breadwinners are single-parent ones (INEI, 2017), therefore it would be hard to argue that being a household head necessarily translates into a better bargaining position within the household. Moreover, this last result may suggest that those regions where women struggle more greatly to support their families are those where women may be forced to allocate in less favourable jobs and sectors (due to time constraints for example), facing larger wage gaps.

5. Conclusion

This study provides a comprehensive review of the evolution of the Peruvian gender wage gaps and identifies key variables that explain observable differences. Despite recent social advances and economic growth, Peru is still one of the countries with the highest gender inequality in the region, mainly in terms of economic independence and labour participation (WEF, 2020). This is particularly worrying if we acknowledge the pervasive effect of current social issues, such as teenage pregnancy and gender violence, in shaping the role of Peruvian women in the economy.

The main findings of this study suggest that the Peruvian unexplained gap has remained stable during the last 13 years at around 17%, with only minor reductions at the lowest end of the wage distribution. During this period, the unexplained wage gap has been consistently larger than the observable raw gap, which provides evidence that human capital variables may act as

mechanisms for narrowing observable gender wage differentials. However, the fact that the unexplained wage gap has remained virtually unchanged suggests the presence of structural problems concerning social norms, gender stereotyping and potentially discrimination in the Peruvian Market that needs to be addressed. A derived policy implication is the need for changing gender stereotypes especially related to who should be the primary caregiver in a household. In addition, the creation of a national care system that allows households to access subsidised or free day care for children under three years old.

In addition, we conclude that education keeps playing an equalising role: education in the unexplained and explained component contributes to reducing the observable gap of working men and women. Results from the Heckman adjusted decomposition suggest that only the more educated women are taking part in the labour market. In this sense, efforts to narrow education gaps could help to mitigate the gender wage differences by tackling systematic factors that hinder the transition of women into the labour market, especially of those less educated. Our results point out that women at the lowest end of the earnings distribution are most likely to change their employment status and enter into the labour market. Our quantile analysis shows that the incidence of the unexplained gaps is considerably higher for the poorest, which may actually act as disincentives for employment participation if economic payoffs for women in these jobs are too low. This leads to a pervasive cycle of human capital losses for women, which reinforces wage and participation gaps.

Finally, we provide evidence that the most vulnerable workers are consistently exposed to a higher unexplained wage difference. This includes those positioned at the lowest end of the income distribution, informal workers, and the least educated. Finally, after computing the raw and unexplained gap at a region-year level, we show a great degree of heterogeneity both at the observable and unexplained gaps, but also some common trends such as downward slope wage gaps across the distributions and always-positive unexplained gaps. Moreover, we show that the regional GDP per capita is negatively associated with both gender wage gaps, while the domestic gender physical violence rate and the percentage of women as household heads hold a positive relation.

Conflict of Interests

The authors declare no conflict of interest.

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Article

Gender Inequity: Older Workers and the Gender Labor Income Gap in Peru

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Abstract
Using annual household surveys from 2004 to 2019, we examine the existence of a gender labor income gap among older persons in Peru. Two labor income models are estimated: Model 1 uses a basic set of demographic, socioeconomic, and personal characteristics as regressors (also called endowments); Model 2 uses the basic set plus additional personal characteristics. The Mincer-type relationship holds with positive returns for education and experience, and the anticipated association to the endowments. The Oaxaca-Blinder decomposition yields an explained labor income gender gap of 44.4% (Model 1) and 51.5% (Model 2), i.e., controlling for endowments, approximately one half of the labor income difference remains unexplained and can be attributed to discrimination and labor segregation. In light of these results, we estimate Model 3 with two additional variables (*head of household* and *beneficiary of intergenerational private transfer*) which attempt to capture gendered stereotypes. With these two variables which provide information on gender discrimination the explained labor income gap for Model 3 is 71.1%—an increase of 19.6%. The unexplained component of the difference in labor income amounts to 28.8% that we attribute to unobserved variables that operate as post-labor market elements in patriarchal societies. Results show that gender inequity during a woman's life-span manifests acutely among older women, which raises important implications for policy interventions.

Keywords
aging; gender inequity; labor earnings; older persons; pension coverage; Peru

Issue
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1. Introduction

Peru is a patriarchal society with gendered barriers to full labor participation. Gálvez (2001) documents that women take on low-productivity jobs that pay low wages, have lower labor market participation rates, and endure higher unemployment rates. Women perform a disproportionate number of unremunerated hours in domestic and care-giving activities at home (Beltrán & Lavado, 2014). Beltrán and Lavado (2014, p. 59) show that the unaccounted and invisible domestic work at home (mostly female work) increases the average poverty rate by 12.6%. Lavado (2017) shows that moms who take care of their children and sustain the reproduction of their families have less time for their own educational and/or professional advancement. Women's access to registered employment—that is, formal employment with social security benefits—is much lower than their male counterparts (Ministerio de Trabajo y Promoción del Empleo, 2019). Older women have lower educational achievement in Peru (Instituto Nacional de Estadística e Informática [INEI], 2021b). For younger women with higher educational attainment, discrimination is still an issue: Barrantes and Matos (2019) discuss

the interplay of structural barriers and gender stereotypes that impede young women from landing a good paying job despite their higher educational attainment. Other scholars have emphasized that gender discrimination and segregation date back to colonial times, extending over the two-century-long republic (Beltrán et al., 2021, pp. 445–447).

Studies document the existence of an overall gender income or wage gap during the active life of workers attributable to inequitable societal structures (Barrantes-Cáceres & Matos-Trifu, 2019; Beltrán & Lavado, 2014; Lavado, 2017). However, they do not always capture the nuances of gender income inequity among older persons. This is problematic, because gender inequity cumulates throughout a woman's life and the income gap actually widens over time:

> Gender is a significant determinant of well-being in old age. Women face greater challenges in older age than men. Part of this is due to longevity. Women, on average, live five years longer than men, and the global population of older people is significantly skewed toward women. They must maintain their income streams for longer time, and their vulnerability increases with age. They are much less likely to be employed in the formal sector and are therefore less likely to have a pension or formal work later in life. (Center for Financial Inclusion & HelpAge International, 2015, pp. 4–5)

In addition, the incidence of poverty among older women tends to be high (Huenchuan, 2012, 2013; Stark et al., 2005). For that reason, when examining gender income inequity and possible policy interventions, the effect of age cannot be ignored.

To that end, Beltrán et al. (2021) offer a lifespan approach to the analysis of gender inequity. During adulthood, they estimate the gender income gap, and to capture gender income inequity in old age, they use pension coverage rates as a proxy. The pension scheme in Peru consists of a contributory component with two parallel systems: the private pension system (PPS) and the national pension system (NPS). A non-contributory or social pension called Pensión 65 (P65) for older persons who are extremely poor supplements the contributory scheme (P65 covers 23% of persons 65+). The pension coverage rate proxy is useful because inequities in the pension system reflect in part labor segmentation and gender discrimination. Beltrán et al. (2021) use data from INEI (2021b, p. 11) which reports that only one third of older persons—60-year-olds or older (60+)—earn a contributory pension. This coverage rate has a severe gender gap: 43.5% of older men earn a contributory pension compared to 24.9% of older women.

However, relying on the coverage rate might underestimate or otherwise distort the extent of the old age gender inequity, because it refers to only a subset of the population of older persons. Since pension coverage of older persons is low in Peru (Cruz Saco & Gil, 2021), and, in general, the pension scheme is inadequate (Cruz Saco et al., 2018a; Olivera & Clausen, 2014), older persons go to work in large numbers to make ends meet. INEI (2021b, Table 7.1) reports that before the Covid-19 pandemic, in January–March 2020, 55.4% of older persons were part of the economically active population (EAP). By gender, their participation was 65.7% for males and 46.2% for females (as the pandemic unfolded, labor market participation rates dropped for all ages, and for persons 60+, it dropped to 49.7% in 2021). It is so commonplace for older persons to work that, unlike other countries, Peru does not have a maximum age limit for its EAP statistics (International Labour Organization, 2003).

In this study, we focus exclusively on older persons and use labor income data rather than pension coverage rates. By focusing on labor income of older persons who work, and controlling for having a pension benefit, the measure of gender income inequity will be better estimated. We ask three questions: Are the same institutional patterns and value systems that have perpetuated discrimination against women in the labor force playing out with similar intensity during old age? If so, how? What lessons can we draw to inform policy interventions to eliminate gender inequity for all ages but more specifically for older women? Our findings fill a void in the current literature on gender labor income analysis by providing valuable insights to explain gender inequity among older workers.

Using annual household surveys from 2004 to 2019 (INEI, 2021a), we examine the existence of a gender labor income gap among older persons in Peru. We estimate two labor income models: Model 1 uses a basic set of demographics, socioeconomic, and personal characteristics as regressors (also called endowments); Model 2 uses the basic set plus additional personal characteristics. The Mincer-type relationship holds with positive returns for education and experience and the anticipated association to the endowments. The Oaxaca-Blinder decomposition yields an explained labor income gender gap of 44.4% (Model 1) and 51.5% (Model 2) for the mean difference of labor income between older male and female workers. It shows that after controlling for endowments approximately one half of the labor income difference remains unexplained and can be attributed to discrimination and labor segregation. In light of these results, we estimate Model 3 with two additional variables (*head of household* and *beneficiary of intergenerational private transfer*) which attempt to capture gendered stereotypes. With these two variables that provide information on gender discrimination, the explained labor income gap for Model 3 is 71.1%—an increase of 19.6%. The unexplained component of the difference in labor income amounts to 28.8% that we attribute to unobserved variables that operate as post-labor market elements in patriarchal societies. It is very likely that the unexplained component could be further reduced if unobserved variables pertaining to

gender discrimination could be incorporated. Results show that gender inequity during a woman's life-span manifests acutely among older women which raises important implications for policy interventions.

The article is organized as follows: In the next section, we briefly review Peru's rapid aging, which provides the context for our study. In Section 3, we present our data and main characteristics of the sample. Section 4 summarizes our estimation results. The last section concludes and provides some policy implications.

2. Aging

Peru is aging rapidly. In 2021, 13% of the national population (33 million) was 60+. This proportion will increase to 30% in 2070 (INEI, 2019; UN, 2019). Over the same period, people 80+ will see their population share grow from 2% to 8.6%. Fertility rates continue to drop (below 2), life expectancy at birth is 77 for both sexes, and no changes in migration patterns are anticipated (such as the recent 2017–2019 migrant surge from Venezuela where more than 800 thousand Venezuelans immigrated to Peru; INEI, 2019, Tables 4 and 10). The demographic dividend in Peru—where the total dependency ratio is at least 67,7%, resulting in three working age persons supporting two children/older persons—will end by 2045. This data provides policy makers and society a two-decade period to enhance the national social protection system and ensure the well-being of older persons (INEI, 2020, p. 13; UN, 2019).

Covid-19 has impacted the demographic situation. Peru recorded one of the highest fatality rates globally: a total of 193 thousand dead from Covid-19 by mid-July 2021, which exceeded the average annual national deaths of 172 thousand in 2015–2020 (INEI, 2019, Table 13; Ministerio de Salud, 2021). Table 1 shows the distribution of deaths of older persons by gender. The fatality rate was much higher among older persons: 69.6% of all deaths were persons 60+ and 43.8% were persons 70+. Thirty five percent of all deaths were accounted for in the department of Lima, the capital, which concentrates one third of the total national population. The number of casualties was highest among males. There are at least two takeaways from this evidence. First, the demographic growth rate will drop further from its estimated 0.92% in 2020–2025, and second, the gap in life expectancy at 60 for females vs. males will increase (UN, 2019). It should be noted that life expectancy for women at 60 years of age was 24.4 years and for men, 21.3. The age gap had been narrowing in recent years (UN, 2019).

The aging process advances, but coverage of both contributory and non-contributory pensions challenges the income security of older persons (Altamirano et al., 2019; Bernal et al., 2008; Casalí & Pena, 2012; Cruz Saco, 1998; Cruz Saco & Gil, 2021; Cruz Saco et al., 2018a, 2018b; Mesa-Lago, 2016, 2021; OECD, 2019; OECD et al., 2014). As 50% of Peruvian older persons pack up every day and go to work, mostly as self-employed workers, they do so with considerable risk and often with underlying health issues that may affect their functionality and well-being. In 2021, more than 80% of male older persons had at least one chronic disease (e.g., arthritis, hypertension, heart and respiratory diseases, or diabetes) and 41% had at least one disability (e.g., mobility issues, difficulty seeing, or problems with understanding, communicating, or listening). These numbers were 70% and 49% for older women respectively (INEI, 2021b, Figure 9 and Table 6.2). During the pandemic, things did not get better. Not only were older persons more vulnerable when they contracted the virus, they were apprehensive about the loss of jobs and the prospect of increased poverty.

3. Data and Main Characteristics of the Sample

We use annual household surveys that are nationally representative and provide information on demographics (e.g., age, gender, marital status, household size, place of residence) and socioeconomic variables (e.g., educational attainment, employment status, labor income) among other characteristics from 2004 to 2019. We pool the data, restricting the sample to working older persons 60+ who earn a labor income. The size of our pooled sample is 109,257, after eliminating missing information. Working older persons 60+ represent 50.3% of the total sample of persons 60+ (217,471 individuals). The other 108,214 individuals, if they receive any income at all, may earn one or more pension benefits (e.g., retirement, widower, disability, divorce), earn rents derived from assets, benefit from intergenerational transfers, and/or co-reside in family arrangements that provide

Table 1. Distribution of Covid-19 deaths by age and gender (July 2021).

	60+	Total deaths (%)	70+	Total deaths (%)
Both sex	134,486	69,6	84,663	43,8
%	100,0		100,0	
Female	50,719	26,2	32,651	16,9
%	37,7		38,6	
Male	83,766	43,4	52,011	26,9
%	62,3		61,4	

Source: Ministerio de Salud (2021), authors' calculations.

them with support. Also excluded from the pooled sample are 25,390 "unremunerated" older workers who do not have a listed income (a household survey category). To nobody's surprise, 81.9% of the unremunerated workers are women, 94.3% do not earn a contributory pension, 84,1% do not earn P65, 96.5% are not affiliated to a pension scheme (those under the retirement age of 65), 82.6% are in a relationship (married or living with a partner), and 73.1% reside in rural areas. Basically, unremunerated workers are rural vulnerable women who live without a pension. For half of them, their mother tongue is Quechua, Aymara, or another native language.

Table 2 summarizes the basic characteristics of individuals (by gender and total) at the beginning, end, and in the pooled sample over the period of analysis. The sample size is 3,777 in 2004, 10,435 in 2019, and the pooled sample is 109,257 from 2004 to 2019. The average age is 68 years. The gender composition oscillates around 40% female (60% male). The majority of older workers in the pooled sample are self-employed (81%), with a higher proportion of female as self-employed. For the *overall* Peruvian labor force, the gender balance with respect to dependent and self-employed is more even.

Information on the annual labor income, in constant soles of 2019 (S/), is presented by three quartiles or social classes (P25, P50, and P75) and by the 99th percentile class. Note that US$1 is approximately S/4. In 2004, females in quartile 1 (P25), the poorest bottom 25% of the population, made S/335 or US$83.75 annually (US$7 per month). Males in the same quartile 1 made approximately twice as much, US$178 annually (US$14.8 per month). These values increased markedly over the fifteen-year period. Females' income increased by 268% (a 9.6% annual increase) and males' income by 314% (a 10.5% annual increase). Similar strong increases in annual labor income were realized by quartiles 2 and 3 which showed the monetary income progress during a time of high economic growth accompanied by a drop in the national average poverty rate from 50% to 20%. The strongest increase was experienced by females in the 99th percentile compared to a more modest gain for males in the same class. Women in the 99th percentile however began with much lower labor income.

Income data show severe skewness between social classes. In 2019, for example, the top 99th percentile females made US$1,383 per month while women in

Table 2. Summary of main descriptive statistics 2004, 2019 and pooled sample from 2004 to 2019.

	2004			2019			Pooled sample 2004–2019		
Main indicators	Female	Male	Total	Female	Male	Total	Female	Male	Total
Sample, N	1,226	2,551	3,777	4,113	6,322	10,435	40,009	69,248	109,257
Mean age	68.4	68.2	68.3	68.3	68.4	68.4	68.5	68.3	68.4
Employment by status									
Employees	125	378	503	754	1,543	2,297	5,674	14,767	20,441
Self-employed	1,101	2,173	3,274	3,359	4,779	8,138	34,335	54,481	88,816
Annual labor income (S/2019)									
Quartile 1 (P25)	335	712	531	1,231	2,199	1,614	617	1,280	950
Quartile 2 (P50)	895	2,039	1,500	3,227	6,420	4,942	1,807	3,927	2,947
Quartile 3 (P75)	2,134	4,885	3,854	7,910	14,521	12,121	4,827	10,341	8,257
P99	13,624	49,608	37,346	66,362	92,734	85,381	48,380	90,811	74,877
Contributory pensions									
Yes	34	278	312	152	601	753	1,519	7,474	8,993
No	1,192	2,273	3,465	3,961	5,721	9,682	38,490	61,774	100,264
Type of pension system									
PPS	9	46	55	264	891	1,155	1,464	6,683	8,147
NPS	46	228	274	574	1,261	1,835	4,858	14,787	19,645
Education									
Low (0–8 yrs.)	1,113	2,084	3,197	2,830	3,701	6,531	31,582	46,778	78,360
Medium (9–13 yrs.)	75	319	394	791	1,651	2,442	5,198	14,390	19,588
High (14+ yrs.)	38	148	186	492	970	1,462	3,228	8,074	11,302
Location									
Rural	628	1,525	2,153	1,678	3,103	4,781	18,339	36,279	54,618
Urban	598	1,026	1,624	2,435	3,219	5,654	21,670	32,969	54,639

Notes: Sample, N = number of respondents in the survey; P25 is percentile 25th or quartile 1, P50 is percentile 50th or quartile 2, P75 is percentile 75th or quartile 3, P99 is the 99th percentile in the income distribution; seven respondents did not answer the question about education. Source: INEI (2021a), authors' calculations.

quartile 1 made US$26. Similarly, the top 99th percentile males made US$1,932, and men in quartile 1, US$46. Two observations merit emphasis. First, the income distribution by social class reveals a strong stratification among older workers, analogous to the national pattern of severe inequality (Alarco et al., 2019; Cruz Saco et al., 2018; Desco, 2021; Mendoza et al., 2015). Second, the labor income distribution of older workers by gender shows severe inequality against women.

Table 3 presents the gender gap using the annual labor income for females as a proportion of annual male labor income for the respective quartiles and for the 99th percentile.

The gender income gap decreased by around 10% in the fifteen-year period for the first three quartiles, and it decreased notably for the 99th percentile. In this social class, females made a strong comeback (from 27.5% to 71.6%). For the pooled sample, females earned half the labor income of their male counterparts.

The large majority of working older persons do not earn a contributory pension (see Table 1). For the pooled sample, 92% have no contributory pension, and the proportion is higher for females, 96%. This finding, while self-evident to some, proves the point: almost every older person who works does not have a contributory pension. In contrast, when looking at the total population of 60+, INEI (2021b, p. 10) indicates that one third earns a contributory pension, 24.9% from the NPS and 8.7% from the PPS. In all likelihood, individuals in the pooled sample work due to low pension coverage and inadequacy of the pension scheme.

Since the official retirement age is 65 years, one quarter of older workers are younger than the retirement age (65) and contribute to a pension scheme. Proportionally, more males than females report contributing to a pension scheme, and the number of people contributing has increased over the years. Of the older persons who contribute to a pension system, they are more than twice as likely to be affiliated with the NPS than the PPS.

The level of educational attainment has been improving over time. In 2004, 84.6% had low level of educational attainment (0–8 years), 10.4% had middle school and high school education (9–13 years), and 4.9% had higher education (14+ years). Fifteen years later, in 2019, 62.5% had low level of educational attainment, 23.2% had middle school and high school education, and 14.0% had higher education. However, INEI (2021b, p. 5) reports that for the general population of all persons 60+ (i.e., working and not working), the educational attainment was higher in 2020: 52.4% had low education, 28,3% had medium education, and 19.3% had high education. These proportions are worse for older females. Overall, estimates show that older workers had fewer opportunities to advance their education.

Finally, respondents were well balanced in terms of their geographic residence (urban or rural).

4. Estimation Results

We use a Mincer-type semilog income regression where the dependent variable is the natural log of labor income (expressed in constant 2019 soles). The income variable in the analysis is from both the main and secondary occupations. Regressors (endowments) are age, region (eight different geographic locations), employment status (dependent or self-employed), education (measured in twelve levels), work experience (number of years at the job), having a contributory pension (PPS or NPS) or a social pension (P65), having another pension (widower, divorce, disability, other), affiliation to a pension scheme (for persons who are younger than 65), language (native, Spanish, foreign), marital status, number of household members, health insurance, and chronic disease. Following the Mincer-type relationship, we expect that labor income, the dependent variable, will be positively associated with level of educational attainment and experience. The other regressors complete the modeling of the dependent variable. We use a pooled OLS estimation with fixed effects and test for absence of multicollinearity and robustness. OLS estimations are conducted for three models: Model 1 uses a basic number of controls (age, region, employment status, education, having a pension, affiliation to a pension scheme, mother tongue, and region); Model 2 uses the basic number of regressors of the previous model plus additional controls (work experience, social pension [P65], having other pensions, marital status, number of household members, health insurance, and chronic disease); Model 3 adds two control variables: *head of household* and *beneficiary of intergenerational private transfers*. The justification for inclusion of these variables is as follows. First, in traditional, patriarchal societies, with strong *machista* values and familism (social structure that implies subordination of the individual to family relationships), the male figure as head of household is dominant. Hence, the number of male headed households tends to be higher in

Table 3. Female annual labor income as a proportion of male annual labor income, in %.

Income group	2004	2019	Pooled sample 2004–2019
Quartile 1 (P25)	47.0	56.0	48.2
Quartile 2 (P50)	43.9	50.3	46.0
Quartile 3 (P75)	43.7	54.5	46.7
P99	27.5	71.6	53.3

Source: INEI (2021a), authors' calculations.

communities with strong gendered stereotypes. Second, reciprocity relationships within kin and intergenerational solidarity are social norms that prompt younger generations to transfer money or in-kind resources to their elders, especially to moms and older women (Cruz Saco & Zelenev, 2010; Pelaez & Martinez, 2002; Ramos Padilla et al., 2009).

In Models 1 to 3, the estimated coefficients on the regressors (dummies and numerical variables) are statistically significant (at least at $p < .1$ but mostly at the $p < .001$ significance level) and have the expected signs. The coefficients on age show lower returns to aging. Returns on self-employment are positive relative to dependent employment. Earning a contributory pension, being affiliated to a pension scheme, having health care insurance, living with other household members each impact labor income positively, but residing in less urbanized regions is negatively associated to the regressed variable. Schooling and experience (measured by years at the job) have the anticipated positive impact on income earnings with the highest coefficients at grade 4 in primary school and technical certification. Speaking a native language mother tongue (e.g., Aymara, Quechua, other) relative to Spanish decreases labor income but having a foreign mother tongue (e.g., English, Portuguese) increases labor income. Earning the social pension, P65, is negatively associated to labor income, which was also a finding in Gertler and Galiani (2016) and Macroconsult and Instituto Cuánto (2016). Being a widower, divorced, or separated are negatively associated to labor income, but being a single person is positively associated to labor income. Earning other pensions (e.g., orphan, disability, widower) reduce the labor income. Finally, chronic disease was not a significant dummy.

Model 3 was designed to capture the outcome of post labor gender market discrimination—other than personal characteristics—represented by gendered stereotypes in family structures (a feature of patriarchal societies). The variable *head of household* is positively associated to labor income. And the variable *beneficiary of intergenerational private transfers*—an alternative source of income for older women—is negatively associated to labor earnings. This variable represents how nuclear and extended family members compensate older women, in particular, for their previous and current roles as family care-givers in support of their well-being.

We use the Oaxaca-Blinder decomposition for the pooled sample to examine the mean labor income difference (D) between the group of older male workers and older female workers respectively (Ariza & Montes-Rojas, 2019; Duncan & Sandy, 2013; Fortin et al., 2011; Jann, 2008; Ñopo, 2008). Following the order of presentation of how D is accounted for in Sharma (2017), we identify three components:

1. The endowment effect (E): It is the part of the income difference that is due to group difference in the regressors. Our findings suggest, therefore, that older males and older females have different endowments (i.e., personal characteristics) that support their labor income.
2. The coefficient effect (C): This component is the contribution of differences in the coefficients of regressors. In other words, this is the part of the gender income gap which arises because older persons' endowments do not impact labor income in a gender-neutral way. It is possible to justify this gender gap as one motivated by two explanations. First, the gap might be explained due to a gendered deviation in older persons' endowments from the gender-neutral benchmark (e.g., a man's experience has more value than a woman's). Second, another gap arises due to the fact that older women's responses in the labor market are not gender neutral (i.e., discrimination; e.g., the market *values* a man's experience more than it values a woman's experience).
3. The interaction component (I): This component refers to the simultaneous interaction of the previous two effects. A positive interaction term adds to the coefficient effect C of the gender gap, and a negative interaction reduces said effect.

Oaxaca-Blinder results for the pooled sample and Models 1 to 3—as well as for the three components, E, C, and I as described above—are presented in Table 4. These estimations are robust, do not exhibit multicollinearity, and the R-squared are 0.4232 for Model 1, 0.4426 for Model 2, and 0.4429 for Model 3. The difference R is 0.561 for the three models. The part of R that is due to the endowment effect (also called the "explained component") is 0.249 in Model 1, increases to 0.289 in Model 2, and further increases to 0.399 in Model 3. The coefficient effect (also called the "unexplained component") decreases from 0.284, to 0.239 and 0.209 in Models 1, 2, and 3, respectively. The interaction effect is positive in Models 1 and 2 but negative in Model 3. Here, the interaction effect reduces the unexplained component or discrimination precisely because two variables were introduced to capture the gendered social norms that permeate work and social relationships that ultimately affect the gender income gap.

These results can also be presented as percents. Model 1 and Model 2 explain 44.4% and 51.5% of the gender labor income gap respectively. Model 3, with the introduction of variables which capture gender discrimination, increases the explained component to 71.1% and the discrimination or unexplained component accounts for 28.8% of the gap.

5. Conclusions and Policy Implications

We used the Peruvian household surveys from 2004 to 2019 to assess the existence of a gender income gap among older workers (60+). Descriptive statistics show that, on average, women's labor income is half

Table 4. Oaxaca-Blinder decomposition results using male vs female mean labor income, 2004–2019.

	Model 1	Model 2	Model 3
Difference (R)	0.561***	0.5*r*61***	0.561***
Due to endowment (E)	0.249***	0.289***	0.399***
Due to coefficient (C)	0.284***	0.239***	0.209***
Due to Interaction (I)	0.0281***	0.0324**	−0.0474*
Explained component, *Endowment as percent of total (E/R)*	44.39	51.52	71.12
Unexplained component, *Discrimination as percent of total (C+I/R)*	55.63	48.38	28.81

Note: Significance levels are $p < .1$, * $p < .05$, ** $p < .01$, *** $p < .001$. Source: INEI (2021a), authors' calculations.

the income of their male counterparts (see Table 3). The Oaxaca-Blinder results confirm the existence of a gender labor income gap where differences in endowments explain between 44.4% and 51.2% of the income gap when regressors pertain to personal characteristics (see Table 4). We then incorporate two variables that proxy gendered stereotypes present in patriarchal societies (*head of household* and *beneficiary of intergenerational private transfers*). With these two additional variables that provide information on gendered attitudes, we increase the explained component from 51.2% to 71.1%, a substantial increase. The unexplained component of the difference in labor income amounts to 28.8% that we attribute to unobserved variables that operate as post-labor market elements in patriarchal societies. Notwithstanding better educational attainment of younger women, several scholars have documented high levels of discrimination at home and at the workplace that are resilient. At home, in particular for this age group, women are assumed to do the chores, to care for children, the elderly, and family members who are sick. Sustaining the family in this way is a social norm that has been passed on from generation to generation. Thus, for older women, gender inequity has cumulated over time.

This article was motivated by three critical issues: Are the same institutional patterns and value systems that have perpetuated women discrimination in the labor force playing out with similar intensity during old age? If so, how? What lessons can we draw to inform policy interventions to eliminate gender inequity for all ages but more specifically for older women? The answer to the first posed question is affirmative. The same institutional patterns and value systems that have perpetuated women discrimination in the labor force continue to play out with similar intensity during old age. The answer to the second question is that gender inequity and discrimination manifests in a variety of ways. First, women earn lower income than those determined by their endowment, differences in coefficients regarding their endowments for a gender-neutral threshold, and interaction of the latter with the differences in endowments. Second, women are distributed in social classes that show severe inequality among the same gender group (same is true for men). Women at the P99th earn significantly higher income than poor women who, on average, live in rural areas and are less educated. It means that the labor income distribution among women requires an intersectional approach. The latter means that women's identities and livelihoods are not only determined by their common gender but also by socio-economic class, ethnicity, being old or being very old, their urban or rural background and other dimensions that explain the diversity of their experiences. These dimensions need to be taken into account for the design of best interventions. Third, older women and men probably work because the pension coverage is insufficient and their financial and self-assurance needs are vast.

And finally, with regard to the third question, active interventions such as those recommended by Barrantes-Cáceres and Matus-Trifu (2019), Beltrán et al. (2021), Gálvez (2001), Lavado (2017), and Mesa-Lago et al. (2021) need to be instituted to undo historical and institutional social norms that maintain gender inequity. In particular, regarding older women, governments should increase non-contributory pensions and establish universal benefits that are equivalent to a living wage. Women in rural areas and unremunerated older workers should be prioritized. Governments should adopt compensation mechanisms for moms and for women who stop contributing to give birth and/or take on care-giving at home. More importantly, an inclusive social protection system in support of older females should also include effective health care services, adequate housing, and the provision of care at home or in nursing homes that should be funded with general government revenues and with social security contributions that should be mandatory.

In 2020, Peru ratified the Inter-American Convention on Protecting the Human Rights of Older Persons, an instrument adopted by the Organization of American States in 2015 which specifically protects the rights of the elderly (Rodriíguez-Pinzón, 2016). Unfortunately, ten countries must ratify the Convention before its terms go into effect. Including Peru, only nine countries have done so. One of the important contributions of the Convention is its intersectional approach to gender. The Convention explicitly references the importance of

a gender perspective (as well as gender equality) when designing policies and programs. Including a gender perspective is important in the context of old age rights-protection, because in many places—including Latin America—the burdens of old age are not shared equally. Zapy (2018) argues that the production and distribution of care in most Latin American societies concentrates within families. Since generations of women have been providing this care, a comprehensive revamping of the organization of care—for children and older persons in particular—is a necessary condition to empower women economically and in society. Uruguay stands out in this respect. In 2015, the government of Uruguay adopted a multi-prone national integrated care system (NICS) that considers care as a basic right for all people through public policy interventions. NICS shifts caring responsibilities to the government, the private sector, and non-governmental organizations, thereby progressively relieving women from caregiving that impaired their labor participation and upward mobility (Salvador, 2019).

One way in which countries can overcome gender exclusionary social protection policies is to reconceptualize social insurance as a system which promotes social investment rather than one which is based on mandatory salary contributions. Contributory schemes often have significant coverage gaps which reflect and intensify long-lasting inequalities from the labor market. On the other hand, social investment interventions in vulnerable groups (children, youth, low-skilled workers, women, older persons, and persons with disabilities) can aim at the inclusion of those with the most need who have traditionally been marginalized (Amarante et al., 2019). In Peru, while the adoption of an integrated care system like the NICS must await more favorable political and financial conditions, other specific policy recommendations are in order. For example, as documented by Amarante et al. (2016)—with respect to Argentina, Brazil, Chile, and Uruguay—and by Arza (2017)—with respect to Europe—minimum pensions and social pensions are interventions that can reduce the gender pension gap (though given the very low contributory rates of female workers in Peru, the preferable intervention in the near future is a more robust social pension). Beyond minimum and social pensions, a set of additional recommendations emanate from the OECD (2016) analysis on gender equality in the Pacific Alliance (Chile, Colombia, Mexico, and Peru). To reverse the structural drivers of gender inequality, the OECD (2016) proposes the following actions: (a) ensure the enrollment of girls in fields of study with high returns to education (STEM fields); (b) help women transition into higher education and provide child support if they are moms; (c) expand employment to formal jobs with social security protection; (d) enhance access to finance and technical assistance to female entrepreneurs; (e) reconcile and balance work at home and in the work place; (f) raise awareness of violence against women (home, work, public spaces), reduce gender biases in the justice and police systems, and help women access justice; (g) eliminate gender wage discrimination, adopt flexible working hours for women, and promote the recruitment, training and promotion of women; and (h) continuous assessment of programs to attain gender equity.

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Conflict of Interests

The authors declare no conflict of interests.

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Article

"The Revolution Will Be Feminist—Or It Won't Be a Revolution": Feminist Response to Inequality in Chile

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Abstract
This article argues that gender inequality, which in Chile is superimposed on a societal and economic structure characterized by deep inequalities that cut across every aspect of society, has been sustained by a political and legal system that has severely limited women's access to economic power and equality. The neoliberal policies implemented by the Pinochet dictatorship and maintained by the democratically elected regimes after 1990—generally characterized as an elitist democracy—have sustained this pattern of inequality. We argue that this gender inequality gave urgency to the regeneration and evolution of Chile's feminist movement and drove the movement to develop claims against "the precarity of life," uniting Chileans in a common struggle, contributing to the October 2019 "social explosion" and now the writing of a new constitution. We believe the current climate is rooted in the social mobilization that was the response to Chile's economic and political system, and the feminist movement's ability to put the rights of women at the forefront of the political and socio-economic agenda. In conclusion, we reevaluate the current climate to consider what a significant feminist presence means and how women can be effectively included and benefit from Chile's economy and influence its progress.

Keywords
Chile; democracy; feminism; gender inequality; inequality; social movements

Issue
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1. Introduction

On July 4, 2021, nearly two years after Chile's 2019 *estallido social*, or "social explosion," Elisa Loncón, a Mapuche activist and scholar, was elected president of the Constitutional Convention. The vote was the culmination of, first, a national plebiscite to determine whether to re-write Chile's dictator-era Constitution (an overwhelming 78% voted "yes") and, next, elections for the 155-member Constitutional Convention. The latter was the first institution to reach complete gender parity (78 men and 77 women) and is one of the country's most representative ever, with a majority of seats going to independent and left-wing candidates (Ríos Tobar, 2021). The significance of this level of inclusion was clear in Loncón's inaugural speech. She stated that this is an opportunity to *refundar* (reestablish) Chile, to build a plurinational country that, among other things, puts the rights of women at the center, builds a new relationship between all people, and, through a transparent process, will strengthen participation and democracy (Puertas Cavero, 2021).

The purpose of this article is to examine how Chile's democratic deficit and enduring inequality, particularly the gender inequality that is superimposed on Chile's general inequality, gave urgency to the evolution of Chile's feminist movement. We argue that this urgency empowered the feminist movement to make claims that both centered gender issues and united Chileans into a common struggle. Through the articulation of this struggle and collaboration with other movements, feminists built power and, ultimately, influenced the mobilization

that led to the 2019 social explosion and now to the writing of a new constitution. We believe the current climate is rooted in the social mobilization that was a response to Chile's economic and political system and the feminist movement's ability to bring the rights of women to the forefront of the conversation, giving a name to "the precarity of life" that many Chileans, regardless of gender, experience.

The second section of the article provides context for Chile's democratic deficit, social movements' demands for political participation, and the feminist movement's demands against the precarity of life. The third section provides an overview of general inequality in Chile, starting with the Pinochet dictatorship and the neoliberal economic model, and providing an overview of economic and social policies under different presidents from 1990 until 2019. This section also addresses the lack of transformative power attributed to Chile's "democracy of elites." The fourth section addresses gender-based inequality and the laws and culture that uphold it. In the fifth section, we give an overview of the development of Chile's feminist movement, with particular attention to its regeneration in recent years and its ability to frame grievances that were both relevant to women and the broader Chilean society. In the conclusion, we revisit the current climate to consider what a significant feminist presence means and how women can be effectively included in Chile's economy and influence its progress.

1.1. A Note on Methodology

Our argument is rooted in the belief that social mobilization in Chile exists in its current form due to what Norris (2011) calls a "democratic deficit" that has necessitated a re-emergence of social movements. It is from this understanding we explore how in recent years the feminist movement has driven mobilization against inequality. To construct our article's argument, we have done a detailed review of the political science literature regarding Chilean politics and social movements. Additionally, we compiled quantitative and qualitative secondary data, including interviews, news articles, surveys, and global reports, to answer four main questions:

1. What inequality exists in Chile?
2. Why does this inequality exist?
3. What are the most important feminist claims?
4. How has the construction of these claims by the feminist movement advanced social mobilization in Chile?

Chilean feminists have constructed a process and framework through which claims are articulated and power is built. Because of this, we paid particular attention to what current feminist leaders themselves have to say about the theoretical and practical foundation for their claims, the process of developing these claims, and how the claims were used to engage movements more broadly. We believe that viewing the movement through its framework, which is rooted in decades of feminist action and an intersectional perspective, allows for the best understanding of its influence.

2. Chile's Democratic Deficit, Participation, and Framing

Following Pippa Norris, we believe that Chile today suffers from a "democratic deficit" and that this deficit explains the appearance, development, and activity of several social movements which have demanded changes in Chile's socioeconomic and political system. According to Norris (2011, p. 5), the democratic deficit "arises from some combination of growing public expectations, negative news, and/or failing government performance." The democratic deficit is rooted in several factors including societal changes and dissatisfaction with the government's institutions and policy performance (Norris, 2011, p. 7). The failure of democracy cannot be traced to one single element but rather derives from complex socio-political processes driven by unsatisfied expectations, combined to produce a crisis of legitimacy. While dissatisfaction with policies does not always lead to social movements' actions, when it does, the participants are questioning the very legitimacy of the government (Lipset, 1983, p. 64; Norris, 2011, p. 17). We posit that this is what has happened in Chile since the beginning of the 21st century.

While these grievances might explain the proximate reasons for the social explosion of October 2019, it is important to also focus on the relatively more distant causes. Rhodes-Purdy (2017) argues that concerns with participation and not with representation or economic performance drive citizens' attitudes toward the state and that the presence of the binomial electoral system and elite preference for negotiations versus participation have drastically limited the political role of citizens. In Chile, the social explosion was a result, on the one hand, of dissatisfaction with the economic model and the inequality it supports and, on the other, as shown by Rhodes-Purdy (2017, pp. 1–31, 180–222), the lack of faith in parties' willingness to allow citizen participation.

The democratic deficit and dissatisfaction with the lack of channels for political participation can explain the re-emergence and evolution of Chile's social movements; but how do movements bring about change, and what has made Chile's feminist movement particularly impactful? To move from awareness to action, movements must be able to articulate claims that engage a critical mass of people. By creating a shared definition of "who is affected and responsible for the injustices and how to fight and discourage them" (Mårtensson, 2018, p. 28), feminists have allowed people "to locate, perceive, identify, and label" their personal and shared experiences (Goffman, 1974, p. 21).

The nature of feminist movements allows them to frame issues from a gender perspective and connect

them to broader struggles. Following Franceschet (2005, p. 139), women's movements "organize around issues important to women and their communities and seek to raise public awareness about these issues." Franceschet (2005, p. 139) also writes that through this process, many individuals:

> Become more aware of the gendered sources of their problems, but also how class and race inequalities are implicated in political and social power structures. Through this process, groups that form to address particular problems…may eventually forge alliances with other groups, creating broader struggles for social change.

Alondra Carillo, notable member of the Coordinadora Feminista 8M (CF8M) and elected member of the Constitutional Convention, offers a contemporary perspective: "Feminism's rejection of the existing order puts the lives of women and sexual dissidents at the forefront as a political issue, and, in that sense, too, it laid the groundwork for political and social revolt" (as cited in Anderson, 2021). Regarding the *estallido* in 2019, she notes it was not spontaneous but instead, rooted in struggles that occurred over many years across social sectors and feminism brought "the capacity to name something that we all had in common" (Anderson, 2021).

In the case of Chile's feminist movement, naming the "precarity of life" created a unifying message and common understanding of the inequality people in Chile face. This precarity is the product of a neoliberal economic system combined with the violence of patriarchy, which together create insecure social and economic conditions (Green Rioja, 2021). Feminist demands are *against* the precarity of life and the ways that people living under capitalism and patriarchy experience violence. While the new wave of Chilean feminists maintains the fight against sexual violence and femicide, they also recognize that, to gain equality, there must be "feminist politics in every area of society: work, school, politics and familial life" (Green Rioja, 2021, p. 6).

3. Inequality: A Brief History

Despite the country's democratic structure and the developmentalist policies pursued between the 1930s and the early 1970s, Chile suffered from profound economic inequality and a structured class system. These profound inequalities were at times reduced because of favorable domestic policies or external markets, but they never disappeared. As noted by Rodríguez Weber (2017), while Spanish colonization created profoundly unequal societies in Latin America, in the case of Chile inequality can also be linked to the development process that began in the mid-19th century.

While Rodríguez Weber's careful historical analysis effectively links the fluctuations in inequality to changes in the internal and external markets, the Gini coefficient (the standard measurement of inequality; see Figure 1) was always high and the expansion of state functions during the mid-20th century and the accompanying policies for import substitution industrialization (ISI) did not alter this process. It is noteworthy that we see declines in inequality during the mid-1960s and early 1970s (during the Frei and Allende administrations) because of their redistributive and social policies. However, inequality increased again during the Pinochet dictatorship (1973–1989) and decreased somewhat after the transition to democracy.

3.1. The Pinochet Dictatorship: The Impact of Neoliberalism

Due to General Pinochet's violent military coup in September of 1973 and the actions carried out by his government in the next 16 years, several thousand people were killed or disappeared and tens of thousands were tortured; Chile's political institutions were destroyed, and the political and economic role of the Chilean state and the private economic actors were totally transformed. In the aftermath of the coup, Congress was closed, political parties were either suspended or destroyed, unions and union members were destroyed, individual rights and the free press disappeared, and power was concentrated in the hands of General Pinochet and the commanders in chief of the other branches of the Armed Forces. Through the 1980 Constitution, Pinochet constructed the bases for an authoritarian state that lasted a total of 16 years and limited democracy for at least another twelve years (Constable & Valenzuela, 1993).

The dictatorship's economic policies were designed and implemented by the "Chicago Boys" economists. The Chicago-inspired policies embedded in the 1980 Constitution, entailed a true economic revolution as they reduced the regulatory, investment, and distributive functions of the state and opened the entire economy to external competition. The Chicago policies led to the privatization of state-owned properties and the privatization of social policies, including social security and education, as well as the partial privatization of health and the deregulation of the labor market.

The combined effect of these policies had a large impact on the economy and wages. By 1975, the implementation of the market policies had contracted GDP by 12.9%, followed by yet another economic recession in 1982 that accounted for a 14.5% reduction in GDP. By 1983, the unemployment rate reached 23.9% and real wages were 14% below their 1970 level (Banco Central de Chile, 1983, p. 24; García & Wells, 1983). At the other end of the economic spectrum, a handful of economic groups or conglomerates gained enormous fortunes from the privatization process and the reallocation of credit and other resources (Dahse, 1979, pp. 188–193). The result was an impoverished population and increases in inequality.

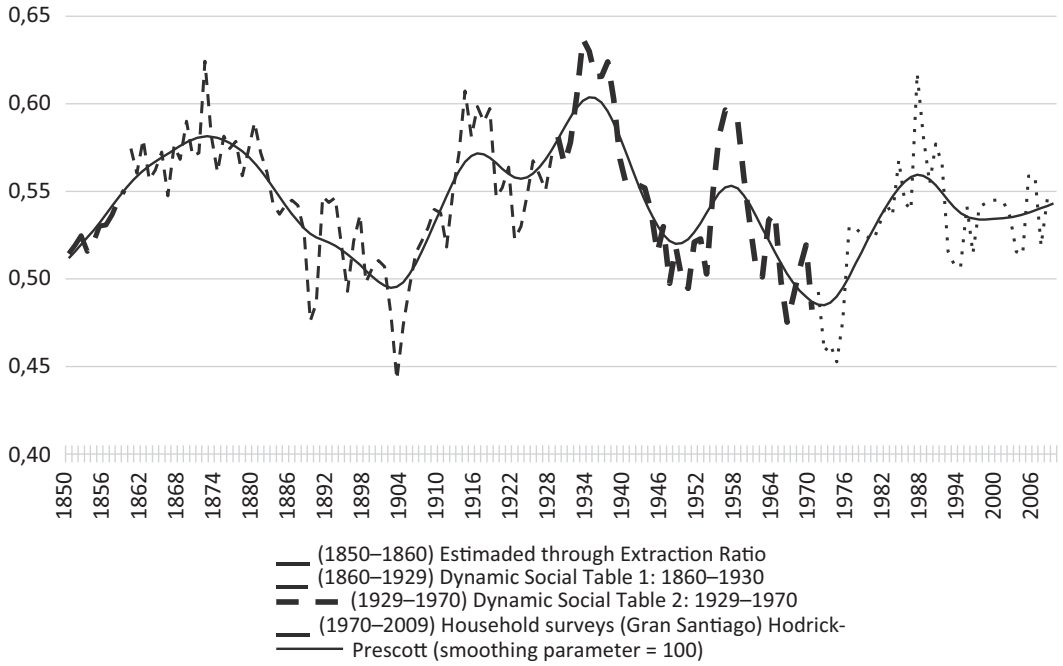

Figure 1. Gini coefficient 1850–2009. Source: Rodríguez Weber (2017, p. 8).

The legacy of the Pinochet regime was one of massive human rights abuses, poverty, and huge economic inequality. When President Aylwin took office in 1989 he encountered a set of decimated social policies. Spending on health was 40% of its 1974 level and 35% below the 1981 level; educational spending was 6% below the 1974 level and 25% of the 1981 level. Most dramatic was the poverty data which showed that 45% of the population were below the poverty level and 27% were extremely poor. The percentage of people below the poverty line in 1970 was 17% and wages in 1989 were still 29% below the 1981 level (United Nations, 1998).

3.2. Economic and Social Policies 1990–2019: Democracy, Neoliberalism, and Inequality

The post-dictatorship political and economic system was built based on a continuation of the neoliberal model and a political system that has become known as an elitist democracy. We will first provide a brief analysis of the overall economic structure and its impact on inequality, and then we will analyze the political structure from which those policies originated.

The end of the Pinochet regime did not produce any major transformations in Chile's political economy because the economic model was and still is an integral part of the 1980 Constitution. Chile's economic landscape in 1990 was defined by high rates of growth and profound inequities as the economy was growing at an average of 7.4%, inflation was about 18%, the unemployment rate was 8.8%, and real wages were growing at about 2.5% per year. Additionally, social spending had suffered major contractions and 45.1% of the population was living below the poverty (United Nations, 1998). The challenge for the democratically elected administrations was to maintain the market model while improving social conditions.

Chile was also exhibiting a profoundly skewed income distribution. By 1996, the highest 20% of the population captured 56.7% of the income, while the lowest 20% received only 4.1% of the income. Nevertheless, while the Concertación—new governing coalition—socioeconomic policies led to massive poverty reductions, the same policies did not produce a substantial reduction in inequality. At the beginning of the 21st century, Chile's Gini coefficient of 0.58 was the third highest in Latin America and twelfth highest in the world. By 2006, the Gini coefficient was still 0.56 (Meller Commission, 2008) and by 2017, according to data from the World Bank (n.d.), it had declined to 0.46.

It is noteworthy that there are very large income disparities not only between the different income quintiles but also between women and men and between urban and rural areas, with urban income at the time being 87% higher than rural income. As in other Latin American countries, the income disparities increased during the years of high economic growth. Marcel and Solimano (1994, p. 219) reported that the top 20% captured 61.5% of the income while the lowest 20% received 3.4%. Between 2011 and 2017, the income of the top 20% remained fairly stable at about 51–52% of total income (Statista, 2021a). Simultaneously, the bottom 20% received 5.7% of the income (World Bank, 2017).

3.3. Democracia de Acuerdos

Underpinning the economic system briefly described above, there was a new form of democratic engagement

known as the *democracia de acuerdos* ("democracy of agreements"; Siavelis, 2016). In this system, political leaders sought to build consensus, including with Congress members coming directly from Pinochet's regime. This *democracia de acuerdos* was rooted in the very nature of the transition to democracy, steered by the 1980 Constitution which constrained the ability of elected governments to move away from the market economic policies. Thus, political and socioeconomic reforms were partial at best as they resulted from multiple agreements both within the governing coalition and with the right-wing opposition that held veto power over the system. While this type of elitist democracy gave the country political stability, its legitimacy declined as more and more people felt excluded from accessing a decent education and pension, or good health care among other things.

Despite his Socialist background, President Lagos (2000–2006) did not develop policies geared to reduce inequality. Much to the contrary, his pro-market tax and labor policies explain why inequality remained the same. President Michele Bachelet (2006–2010), also a socialist, was deeply concerned with inequality and argued for a pro-equality agenda as a necessary condition for development and social cohesion. Following Bachelet at a 2005 seminar on inequality, the inequality agenda would be founded in a new social dialogue involving workers and labor reforms, students and teachers, and educational reform, as well as a pension reform, pro-children, and pro-women policies. However, her ability to implement a pro-equity agenda was again limited by the administration's commitment to the market model and the veto power that the right-wing coalition had on legislation. Nonetheless, President Bachelet obtained the passage of an electoral reform which, among other things, expanded women's political participation. Limited legalization of abortion was also approved by Congress (Londoño, 2018).

During the first Piñera administration (2010–2014), the discussion was centered on the question of the *salario etico* ("ethical salary"). Following the recommendation of the Meller Commission, as well as civil and religious leaders, the first Piñera administration implemented the first component of an ethical salary program in March 2011. The policy involved a subsidy to the poorest economic groups conditioned to the fulfilment of certain commitments and the promotion of female employment and employment in general. A study on the impact of these policies shows a positive effect on poverty and inequality reduction, but a negative effect on labor participation (Cabezas & Acero, 2011).

During President Piñera's second administration (2018–2022), the focus was initially on an adequate sufficient salary and yet another attempt to reform the pension system. To deal with the insufficiency of the minimum salary, the Chilean Congress approved a 3.6% increase of the minimum in September of 2018. However, the minimum salary as of January 2021 is about US$440 for those between the ages of 18 and 65 and lower for those under and above those ages (Statista, 2021b). The insufficiency of these reforms, in addition to the insufficiency of pensions, the high cost of health care and education, and the need for a new constitution and an end of neoliberalism led to the massive demonstrations of October 2019 (Borzutzky & Perry, 2021). While the pandemic stopped some of the demonstrations and massive acts of defiance, it also laid bare both Chile's enormous inequities and the inability of the Piñera administration to deal with these challenges.

In brief, Chile's large historical inequalities briefly reversed by the more socially minded policies of the Frei and Allende administrations, increased dramatically during the dictatorship. The coexistence of democratically elected government, the neoliberal model, and an elitist approach to governance between 1990 and 2019 explains reductions in poverty and relative reductions in inequality, which have had an even more pronounced impact on women in Chile.

4. Gender Inequality

4.1. The Constitution and Gender Inequality

Superimposed onto Chile's general inequality is a clear gender inequality that has both cultural, economic, and political roots. From a political/legal standpoint gender inequality was consecrated in the dictatorship's 1980 Constitution because as opposed to other 20th century constitutions, this one does not promote gender equality or address gender discrimination. Moreover, to the extent that the constitution gave the political right a veto power, right-wing parties could block policy proposals geared to create a more equal situation for women. Additionally, as noted by Lambert and Scribner (2021, p. 225), the 1980 Constitution does not support gender-based litigation geared to protect their rights and, more often than not, women are reluctant to use the courts to defend their rights. The lack of constitutional protections has had a cascading effect resulting in a lack of protection against gender-based violence and limited legal protections against sexual harassment in the workplace because there is no recognition of a women's right to work without the threat of violence. Lambert and Scribner (2021, p. 230) also note that here and in other areas of "pro-women laws" the emphasis is on motherhood and family and not on gender rights. While legislation enacted in 2005 increased penalties for the perpetrators of domestic violence as well as more protective measures including shelters and data collection, the application of the laws remain problematic as litigants need to ground their judicial cases, not on this law, but international conventions such as the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) or the Interamerican Convention on the Prevention, Punishment and Eradication of Violence Against Women (Lambert & Scribner, 2021, pp. 228–229).

Lastly, in the area of sexual and reproductive health, Chile lags behind its peers in Latin America and Europe, especially in regard to abortion. Abortion was limited to saving the life of the mother between 1931 and 1989. As most other abortions were illegally performed in back alleys, many ended in hospitals with uterine infections which were often lethal. Data provided by the Gutmacher Insitute notes that "the clandestine nature of abortion in Chile makes all aspects of the procedure difficult to research" (Prada, 2016, p. 1). The only national study, conducted in 1990, estimated that women in Chile had approximately 160,000 induced abortions annually, for a rate of 45 per 1,000 women aged 15–49. More recent—but less substantiated—estimates cited in the media have ranged from 60,000 to 300,000 abortions each year. "However, it is widely agreed that Chilean women who resort to unsafe pregnancy terminations, and subsequently seek treatment for complications, tend to come from the country's more disadvantaged groups" (Prada, 2016, p. 1).

The situation got considerably worse in 1989 when the dictatorship enacted regulations criminalizing all forms of abortion. Issues such as sterilization, the morning after pill, and attempts to expand women's rights in this area during President Bachelet's second administration (2014–2018) were limited again by the 1980 Constitution and the power of the Catholic Church and the political right. After lengthy discussions a family planning law that allowed, among other things, the provision of emergency contraception was nullified by the Constitutional Court in 2008 (Castellanos, 2009). Small progress was made in 2017 as new legislation decriminalized abortion in cases when the life of the mother was at risk, there were lethal fetal abnormalities, and in cases of rape (Ministerio de Salud, 2017).

4.2. The Gender Wage Gap and Limited Economic Participation

Among the many dimensions of gender inequality present in Chile, this section of the article will focus on issues of economic inequality. A 2017 UNDP report notes that:

> Economic inequality is not limited to income, access to capital or jobs, but also includes education, political power and the respect and dignity with which people are treated. This affects more women, the rural population and the population in the less developed regions of the country, the native population and other minorities.

We believe that Chile's gender economic inequality is rooted both in culture and the law. From a legal standpoint, one of the most critical factors impeding economic equality is the conjugal society regime that regulates married women's access to property and the administration of income:

> This default marital property regime automatically makes the husband the head of the household and administrator of marital property. This has a direct impact on women's financial inclusion and can deter their access to credit, personal wealth, and economic independence. Such a system exists only in nine economies around the world: seven in Sub-Saharan Africa, one in East Asia and the Pacific and one in Latin America and the Caribbean, Chile. (Santagostino Recavarren & Arekapudi, 2020)

This anachronism makes married women in Chile dependent on their husbands and unable to administer their own properties unless there is a prenuptial agreement, which is rare.

In the 2019 UNDP Gender Inequality Index, Chile ranked 55 (UNDP, 2020). The index also shows that 77.8% of women have some secondary education (men 81.1%) and that women's labor force participation is among the lowest in OECD countries at 51.8% (men 74%). It is important to note that data from the World Bank (2021) show an even lower rate of participation at 44.6%. This is lower than Brazil, Argentina, Bolivia, Peru, Uruguay, and Colombia, among others (World Bank, 2021).

As for the wage gap, Reyes Campos has studied its evolution in Chile using pre-1960 social security data and has documented that, from 1939 to 1968, although the gender wage gap diminished over time, the ratio of women's wages to male wages only increased 14 percentage points from 1939 to 1968 (Reyes Campos, 2016). The evidence points towards discrimination (Camou & Maubrigades, 2017). Camou and Maubrigades (2017) find that contrary to what some expected, the gender gap widens gradually as years of schooling rise and that countries that combine high wages with the highest average years of schooling are also the most resistant to this egalitarian trend.

Writing for the World Bank, Santagostino Recavarren and Arekapudi (2020) note that Chile still scores the lowest among OECD high-income economies in terms of women's participation in the economy due to several reasons, including sexual harassment in the workplace (there are no criminal penalties for perpetrators or civil remedies for victim), a law that does not mandate equal remuneration for work of equal value, or prohibit discrimination based on gender in access to credit, and the persistence of the conjugal society. Business Insider's international ranking of wage inequality places Chile as the fourth most unequal country, with a wage gap of 21.1%, higher than Mexico (Delfino, 2018). It is interesting to note that despite legal improvements enacted by the Bachelet administration in 2009, in practice the law has not had a big impact on wages. As noted by Jarroud (2012) "it is not discriminatory to pay a male employee more if he proves to be more suitable, qualified or responsible than his female counterparts."

Wage inequality has translated into pension inequality given the private nature of the system established

in 1980. Data indicates that because women earn less, retire earlier, and must take time off from work to have and raise children and care for their families, their pensions are significantly lower than those of men. To augment women's pensions and reduce gender inequality, the 2008 reform mandates 18 months of state contributions per child (the state contribution is based on a minimum salary). Although the money is not deposited into the account until the woman turns 65, the contribution begins to generate interest from the moment the child is born (Comisión Asesora Presidencial sobre el Sistema de Pensiones, 2015, pp. 118–120).

Despite this very important reform, the value of female pensions has not improved dramatically. The Bravo Commission created by President Bachelet to improve the pension system looked at the replacement rates of pensions and found that 50% of those who retired between 2007 and 2014 (including those who receive the solidarity pension), received monthly benefits of about US$150, or about 40% of the minimum wage. Additionally, during the same period, women received pensions that were about half of those received by their male counterparts. They also found that half of pensioners received benefits that were at most equal to 34% of their last ten years of wages. Those receiving the supplemental solidarity benefit (APS) received a median benefit of $84.298 (or about US$105) for women and $107.073 (about US$133) for men (Bertranou, 2016).

5. Chile's New Wave of Feminists

Given the state of inequality in Chile, the conditions of inequality faced by women and gender minorities, and the limited opportunities for meaningful democratic participation, it is not surprising there has been a re-emergence of Chile's feminist movement. It is broadly acknowledged that there was a decline in all social movements and mass mobilization in Chile after the end of the Pinochet dictatorship (Franceschet, 2005, p. 141). The feminist movement was no exception, and it became a divided and overlooked voice in the political debate (Forstenzer, 2017). However, in recent years, the movement contributed to the re-politicization of inequality (Roberts, 2016), regained visibility, and helped unite Chileans in a common struggle.

In this section, we address Chile's new wave of feminism and its impact in three parts. To begin, we provide context for the development of the feminist movement from the post-transition years to the present, with attention to grassroots feminist action and the political development of feminists within other social movements. Next, we address how the feminist movement's most important claims, including institutional changes to increase social protection and inclusion of diverse feminist interests to eliminate inequity within family and community spheres, work against the precarity of life, and offer opportunities for change inside and outside of political institutions. Finally, we connect feminist claims and coalition building to the 2019 social explosion and Chile's current political moment.

5.1. The Evolution of Chile's Feminist Movement

Before the transition to democracy, Chile's feminist movement was "a vibrant and plural social movement committed to bringing Pinochet's military dictatorship down alongside other social movements" (Forstenzer, 2017, p. 162). After the transition, the movement became fragmented and many feminists, particularly at the grassroots level, were made largely invisible. Meanwhile, feminists that could adopt the language and skills of the state, those that could and chose to function within formal political channels, were legitimized and given the power to be "Feminists reframing feminist claims to make them suitable for public policy" (Forstenzer, 2017, p. 171). Grassroots activists who chose not to adapt institutional tactics, or those whose claims were perceived as too disruptive, were marginalized and excluded from decision-making and funding access.

In the early 2000s, some feminist claims became part of the political agenda. There were advances in women's rights including poverty reduction, a reduction in maternal mortality rates, and strengthening of laws that dealt with gendered violence, as well as support for the victims of such violence (Ríos Tobar, 2008). The first female president, Michele Bachelet, was elected in 2006. Her administration focused on issues of inequality driven by the pension, education, and healthcare systems. While not explicitly focused on women's and gender-based rights, these policies disproportionately affect women as evidenced by smaller and insufficient pensions compared to male counterparts (Borzutzky, 2019). Reforms made by the Bachelet administration had the potential to improve women's access and outcomes as she increased the number of women in political positions and pushed abortion rights legislation (Ríos Tobar, 2008).

Of course, there were limitations to the progress achieved through political institutions. First, Chile's elite democracy and dictatorship-era constitution meant that major progress was largely impossible. Second, while the government and professionalized women's organizations collaborated to develop a policy agenda, many voices were left out of the political process. Forstenzer (2017, p. 171) notes that, most often, this exclusion impacted rural Mapuche women the most. State feminists, those articulating claims within institutions, viewed poor, rural, and indigenous women only as social policy recipients and not collaborators.

However, the story of autonomous feminists is not one of women who aspire to access formal political institutions. Forstenzer (2017, p. 172) writes that autonomous feminists, those that chose the work outside of the state system, "decided very early on that the policymaking system was rigged against radical societal change and that breaking down their agenda

into a "shopping list of demands" was not an option." Instead, the *feministas autonomas* ("autonomous feminists") sought civilizational change. They also sought to prevent professional feminists from re-writing feminist history as a set of linear events that resulted from cooperating with the government (Forstenzer, 2017, p. 172). This is noteworthy given the common narrative that feminism was weakened or close to non-existent after the transition to democracy. Certainly, the movement changed, social mobilization slowed and grassroots activists, especially the most dissident, were made invisible. However, in response to the supposed "new silence" of the feminist movement, scholar, and feminist Claudia Montero writes:

> Autonomous feminism has been active against gender-based violence, pacts of silence, the plundering of natural resources, and supported the Mapuche people through a series of collectives which were active even while [the society] was anesthetized by the economic success of the 90s. (Stevani Gisletti & Montero, 2020, p. 5)

While grassroots feminists remained active in their communities, growing frustration with the limitations of working through state channels resulted in the re-emergence of other social movements during the second decade of Chile's democracy. The 2006 Pingüino protests, a series of student-led protests against the educational infrastructure and transportation costs, sparked a new wave of social mobilization, which created opportunities for new iterations of the feminist movement. Student activist groups and actions provided a space where people were connected, many participating in debates and actions for the first time, and where autonomous development was necessary (De Fina Gonzalez & Figueroa Vidal, 2019, p. 63). The increased engagement of students in the political field, the Frente Amplio party is an example, also built a foundation where students and feminists could share ideas and develop shared slogans and demands (De Fina Gonzalez & Figueroa Vidal, 2019, p. 55). While student protests were the most visible, mobilization was not limited to one movement. Feminists were present in the No+ AFP, labor, and indigenous resistance movements. This resulted in a generation of Chileans that were politicized by their involvement in social movements as a reaction to inequality and neoliberal policies.

5.2. The Current Movement's Most Pressing Claims

The feminist political framework that grew out of these different movements represents a new generation of feminists, whose practice is rooted in the history of the feminists before them, developing strategies and actions to call attention, nationally and internationally, to gender issues (De Fina Gonzalez & Figueroa Vidal, 2019, p. 64). However, Alondra Carrillo notes that the current feminist project in Chile focuses on not only gender issues but the very system that creates them:

> We said: we've spent a long time putting violence on the table, showing it to be a central element of our lives. Now it's time to go a step farther and question this position of victimhood in which we find ourselves, so comfortable for the order that rests precisely on that violence. (Carrillo Vidal, 2019)

For Alondra Carillo and other feminist organizers from the CF8M, the movement's practice is rooted in two main ideas: first, the necessity to act against the precarity of life, that is, the violence and vulnerability that is promoted by Chile's neoliberal political and economic system, and second, that to collectively say "no" to such a system enables feminist politics across issues and movements (Anderson, 2021). Collective resistance also enables feminist politics to move across nations. The rising tide of Chile's feminists is closely tied to the development of feminist politics transnationally, and particularly in Latin America. The 2016 "Ni Una Menos" march, inspired by the Argentine movement of the same name and occurring across Latin America, made it clear that the feminist movement in Chile was no longer an inaudible voice in the political field (Mårtensson, 2018). The main purpose of the march was to bring attention to gender-based violence and demand better supports for women who suffer violence. The march also brought greater visibility to feminism and the movement continued to gain momentum.

In March 2018, 28 cities across Chile participated in the International Women's Day strike (Carrillo Vidal, 2019) and shortly after, the CF8M formed and began organizing to articulate feminists' claims. CF8M coordinated with women from across the county, with labor organizations, and with students. The group developed demands including access to free, safe, and legal abortion, acknowledgment of reproductive labor and care work as labor, and the right to non-sexist education (Carrillo Vidal, 2019). Throughout the year, the "feminist wave" continued. Chilean student feminists led university occupations to protest the patriarchal system that allows for sexual harassment, particularly on campuses. Sit-ins and marches occurred in cities across the country. The protests lasted for months and "paralyzed academic institutions" (McGowan, 2021). Feminist actors asserted that the fight was not limited to institutional protocols or goals, and instead represented cultural and political change across the country (De Fina Gonzalez & Figueroa Vidal, 2019, p. 64). In October 2018, CF8M held the Plurinational Meeting of Women in Struggle to refine their political agenda and prepare for the 2019 women's general strike. To develop an inclusive strike, Carrillo says committees were formed "by territory and sector, by union, by educational institution, by social setting, and by sexual orientation" (Carrillo Vidal, 2019).

The actions that began in 2018 provided an opportunity for people of different backgrounds and experiences to come together. Karina Nohales, an organizer from CF8M notes that "women active in No Más AFP seized the opportunity to focus on the problem of work and social security from the point of view of women workers" (Anderson, 2021). The inclusion of multi-sector feminists allowed the list of feminist demands to broaden and include historical demands related to democracy and inequality (Cuffe, 2020). The movement was determined to be a transformational force and, according to Alondra Carillo, "an oppositional force to all political and economic sectors that have overseen the precaritization of life" (Anderson, 2021).

5.3. The 2019 Estallido Social

Chile's social protests continued into 2019, a year that saw significant street protests and global unrest. While the focus of this article is on the national issues that have driven Chile's social movement development, we must acknowledge there are global dimensions that inform and drive social protest and that, as with feminism in Chile, broader movements gain strength through connection to global struggle. From a national perspective, the massive protest actions that took place starting in October 2019 were made possible by the years-long concatenation of social movement engagement and mobilization in response to the democratic deficit and failures in representation which have prevented any serious attempt at dealing with inequality (Borzutzky & Perry, 2021).

The revolt that began in Santiago on October 18, 2019, in response to a metro fare hike was not just a response to the hike itself but to the various inequalities Chileans experienced in education, health, gender-based violence, work, and pensions. In the days leading up to October 18, students coordinated metro fare evasion tactics by rushing the turnstiles which at times led to confrontations with the police. On October 18, Metro Santiago halted all metro service in response to the ongoing protest actions. The metro shutdown left thousands of commuters stranded and agitated. The protests turned into takeover and vandalization of stations across Santiago, barricades in the streets, and ultimately fires and destruction that disabled the entire system. Over the next few days, the protests and riots continued and expanded across the country. By October 20, President Piñera had declared a state of emergency, implemented a curfew, and brought troops in to respond to the riots. On October 25, over one million people, more than 5% of the country's population, marched in Santiago. They were joined by many others across Chile who gathered to show support and demonstrate that "Chile had awakened."

Through its work in and across social movements, Chile's feminists supported the development of a movement that cut across gender, class, age, and ethnic identity in response to "not just inequality but every institution that had allowed such a situation to fester with blatant impunity" (Dorfman, 2020). Simultaneous to this over-arching movement, feminists maintained visibility through feminist-specific actions. In November 2020, the performance by Las Tesis of their song *Un Violador en Tu Camino* gained immediate global attention. The song, which denounces the role of patriarchy in state violence and declares "and I'm not guilty, not because of what I was or how I dressed," served as a protest within a protest by addressing the violence of rape as one of the many oppressions upheld and enacted by the state.

One of the clearest demands from Chile's social explosion was the need to end the Pinochet-era Constitution, which maintained the policies that allow for the state's precarity of life. At the time of writing this article, a major success obtained by the movement has been to have equal participation in the drafting of the new constitution. While the re-writing of a new constitution is an opportunity to develop the legal basis for gender equity, Chile's feminist framework reminds us of the limitations of changing the system from within the system.

6. Conclusion

The nature of Chile's 1980 Constitution has prevented reductions in inequality—especially in gender inequality—and limited opportunities for impactful democratic participation. The economic and political model codified by the Constitution has resulted in an incomplete transition to democracy (Borzutzky & Perry, 2021) from which multiple social movements have evolved. For feminists, the ability to name struggles from a gender perspective while unifying people across movements through their common struggles has made feminist politics in Chile increasingly visible and necessary for progress.

The inclusivity of Chile's Constitutional Convention represents a success for the feminist movement, which seeks not to simply politicize the experiences of women, but to dismantle the systems from which patriarchal violence stems. This requires constitutional change that provides a legal basis to fight against gender inequality and violence. An independent analysis done by the investigative journalism organization CIPER reports that of the 155 members of the Constitutional Convention, 57.4% have at least one pro-feminist policy included in their agendas (Figueroa et al., 2021), which strengthens the chances these policies will be reflected in a new constitution.

The inclusion of feminists in the Constitutional Convention is not a sign that the movement was in full agreement on how to proceed. For some, any participation in institutional processes, starting with the plebiscite, would allow those institutions to tame the most dissident voices of the movement. For others, including organizers with CF8M, participation in the plebiscite was an opportunity to express popular will.

However, for this group, a willingness to participate does not mean submission to institutionalization. Forstenzer (2017, p. 172) writes that social mobilization feminists "believe autonomy is key for activism," but they "decide on a pragmatic basis when and how to work with state organizations." The feminists represented in the Constitutional Convention see this as a pragmatic opportunity, but to what end? Karina Nohales of CF8M recognizes that the goal is not to simply generate a new constitution and that it is likely many will not feel represented by the latter. She says that "this process is a moment of mass politicization, that is going to be fundamental moving forward," and that feminists are committing to work together over the long term (Anderson, 2021).

At the time of writing, the Constitutional Convention is in its earliest stages. The process, which will take nine to twelve months, holds many unknowns. What is clear, however, is that feminist participation will continue to be central to the process (the phrase "nothing about us without us" is relevant) and that once Chile has a new constitution, the feminist movement will continue to push political and social progress to ensure inclusion of all Chileans. To what extent this movement will serve as a model for other movements in the region is still unknown and it is highly dependent on the nature of the new constitution.

Conflict of Interests

The authors declare no conflict of interests.

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Article

On the Fringes of Urban Justice: Violence and Environmental Risks in Guatemala City

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Abstract
Living in the city's ravines is the common destiny of thousands of poor urban dwellers in Guatemala City, as is too often the case elsewhere in the Global South. The ravines surrounding the city represent one of the most visible and unjust urban spaces in the nation's capital. At the same time, Guatemala City has been among the most violent cities in the world and is highly vulnerable to climate change. Employing a critical spatial perspective and drawing on interviews in two at-risk communities—Arzú and 5 de Noviembre—this article examines the social production of such peripheral spaces. The levels of exclusion and inequalities are analysed by focusing on the multiple manifestations (visible and invisible) of violence and environmental risks, and deciphering the complex dynamics of both issues, which in turn generate more unequal and harmful conditions for residents. This article draws on the theoretical ideas elaborated by Edward Soja, Mustafa Dikeç, and Teresa Caldeira on the contextualisation of spatial injustice and peripheral urbanisation to study the specific conditions of urban life and analyse the collective struggles of people in both communities to improve their current living conditions and mitigate the risk and the precariousness of their existence. The article underlines the need to make the processes of urban exclusion and extreme inequality visible to better understand how they have been socially and politically constructed. The research argues for more socially and ecologically inclusive cities within the process of unequal urbanisation.

Keywords
environmental risks; exclusion; Guatemala City; insecurity; precarious settlements; spatial injustice; urban segregation; violence

Issue
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1. Introduction

Latin American cities are the prime domains of inequalities and violence deeply related to social and economic exclusion (Briceño-León & Zubillaga, 2002; Koonings & Kruijt, 2007, 2009, 2015; Moser & McIlwaine, 2004; Muggah & Aguirre, 2018; Roberts, 2010). The fear and insecurity associated with high levels of violence are the "daily bread" of millions of urban dwellers. In recent decades, the countries in the northern part of Central America (Guatemala, El Salvador, and Honduras) have had the highest homicidal and criminal violence rates in the world (Bruneau et al., 2011); but violence is not a new phenomenon in any of these countries, where extremely insecure urban spaces are a direct consequence of the intersection and overlapping of several path-dependent and structural causes (Bourgois, 2015; González-Isás, 2017; Huhn & Warnecke-Berger, 2017; Kurtenbach, 2013; Rodgers, 2009).

Guatemala has had a long history of violence and state repression by authoritarian regimes, including a prolonged and genocidal civil war spanning 36 years and a very violent post-conflict society (Carey & Torres, 2010; Grandin, 2000; Sanford, 2008; Torres-Rivas, 2007). Consequently, one important dimension of the social insecurities of Guatemalans today is a by-product of the legacies of armed conflict. Guatemala City, both a post-conflict and a fragile city (Muggah, 2014), is a capital

where multiple types of violence (visible and invisible) overlap and come together in relation to the long history of authoritarianism, political violence, and socio-economic and ethnic exclusion (O'Neill & Thomas, 2011). Old and new expressions of violence metamorphose, intersect, and overlap, generating new forms and more complex expressions of violence (Camus et al., 2015; Moser & McIlwaine, 2004; Winton, 2004, 2005).

Violence has been normalised, perceived as a central, endemic, and inevitable part of society (Koonings & Kruijt, 2007; Moser & McIlwaine, 2014). Conflict and violence are strongly associated with a high incidence of urban insecurity and fear, a multidimensional and manifold phenomenon affecting all sectors of society, but especially critical for poor urban areas (McIlwaine & Moser, 2007). As prior research indicates, social exclusion and inequality are the main drivers of interpersonal violence in Central American urban spaces (Pérez-Sáinz, 2015, 2018; Winton, 2004).

Simultaneously, the Central American region is highly vulnerable to the effects of global climate change and prone to natural hazards, such as earthquakes, hurricanes, tropical storms, droughts, and volcanic eruptions (Montero & Peraldo, 2004). Historically, squatting in areas vulnerable to natural hazards, such as the ravines (*barrancos*) of Guatemala City, has been the only accessible option for the poor urban classes (Gellert, 1996; Miles et al., 2012; Morán, 2011; Platas et al., 2016).

This article aims to understand the spatial production of injustice in Guatemala City. I examine the structural dynamics that produce and reproduce injustice through space (Caldeira, 2017; Dikeç, 2001; Soja, 2010), focusing on the multiple manifestations of violence and environmental hazards and vulnerabilities in two "precarious settlements" (the term used in Central America). Based on qualitative research in the communities of Arzú and 5 de Noviembre, the article explores the complex spatial dynamics that create geographies of exclusion and fear, as exhibited in the extreme urban segregation and socio-economic and spatial marginalisation of ravine dwellers.

I pay particular attention to the residents' perceptions of risks, vulnerabilities, and fears, and the impact they have on their everyday life, their well-being, and their social relations. Typically, urban violence and environmental risks have been examined separately. This article examines them together, assessing environmental risks through the lens of structural violence (Farmer, 2003; Galtung, 1969). I argue that residents in both communities are exposed to and trapped by multiple forms of exclusion, types of risks, and manifestations of violence at all levels. Emphasising the spatiality of injustice highlights the dynamics of marginalisation and injustice (Dikeç, 2001).

Violence and environmental risks in Latin America are seldom examined together with a critical spatial perspective. The present article contributes to the existing literature on socio-spatial segregation in Latin America and provides a deeper understanding of the dynamics of extreme urban and social exclusion.

2. Spatial Justice: The Injustice of Spatiality, Structural Violence, and Peripheral Urbanisation

Drawing on Soja (2009, p. 2), this article defines the concept of spatial (in)justice as "an intentional and focused emphasis on the spatial or geographical aspects of justice and injustice," noting that, "as a starting point, this involves the fair and equitable distribution in space of socially valued resources and the opportunities to use them." Space is socially produced; consequently, it can be changed. Thus, characterising spatial injustice becomes a matter of analysing and locating it in a specific urban context—in this case, the analysis of two at-risk communities in the ravines—to contextualise how the unjust urban geographies of Guatemala City have been historically and socially created (Soja, 2010, p. 32).

Moreover, as Dikeç (2001, p. 1797) proposes, a better understanding and conceptualisation of the relationship between space and injustice requires focusing on the structural dynamics that produce and reproduce injustice through space. The distinction between the spatiality of injustice and the injustice of spatiality is essential in this process. The difference between them is that the former presupposes that justice has a spatial dimension, meaning that we can examine different forms of injustice in space (Dikeç, 2001, p. 1792). The injustice of spatiality, on the other hand, examines the structural dynamics and processes that contribute to the creation of such segregated spaces. Dikeç (2001, p. 1799) elaborates further on the differences and relationship between both concepts:

> The interplay between the two—spatiality of injustice and the injustice of spatiality—is important as it implies that although the spatiality of injustice may be captured as a snapshot, so to speak, of spatial practices (for example, segregated neighborhoods, public transportation network, the dominated city center, etc.), the policies and actions conceived to address the issue should take into consideration the structural dynamics of spatialization (for example, the organization of property markets, housing, rent, and tax policies, etc.), which the notion of the injustice of spatiality tries to capture.

Hence, an emphasis on the injustice of spatiality provides the tools necessary to examine how such exclusion and injustice are produced. Without a critical spatial perspective, the creation and consolidation of these types of marginal spaces will likely remain invisible (Soja, 2010, p. 42). Thus, it is essential to make visible the discriminatory processes and geographies and acknowledge the production of such spaces as historically, socially and politically constructed rather than naturally determined (Soja, 2010, p. 48).

Simultaneously, the injustice of spatiality is addressed through the concept of "structural violence" (Farmer, 2003; Galtung, 1969). The term, coined by Galtung (1969, p. 171), asserts that "violence is built into the structure and shows up as unequal power and consequently as unequal life chances." Structural violence is embedded in the political, economic, and social system of a state, reproducing structures of inequality and exclusion; it is closely linked to suffering and social injustice. When people are denied access to health services, a good education, and jobs, when they are forced to live in vulnerable and risky spaces that are also insecure and violent, we should identify these conditions as structural violence (Farmer, 2003; Galtung, 1969).

Inequality is the most important form of structural violence. Inequality can trigger everyday conflict, crime, or general incidents of violence (Winton, 2004, p. 166). Paul Farmer, building on Galtung, has further developed the concept of structural violence based on his experience as a medical anthropologist and physician in Latin America. He notes that structures of violence are the outcome of lengthy political and economic struggles and processes, the result of forms of injustice and adversity embedded within the system (Farmer, 2003). Significantly, factors related to age, gender, and ethnicity strongly contribute to the vulnerability and suffering of certain social groups. But this condition does not in and of itself explain the causes of people's suffering or vulnerability. To discover the root causes of inequality, it is essential to analyse the processes that produce structural violence on a deeper level (Farmer, 2003, p. 50).

This study also draws on Caldeira's (2017) peripheral urbanisation ideas. Her approach provides the essential tools for analysing the dynamics of how marginal areas are produced in cities in the Global South, where the modes of urbanisation are different than in the Global North. Caldeira (2017, p. 5) de-centres urban theory, an essential step to understanding the specific forms of agency and temporalities in the Global South. In Guatemala City, poor urban dwellers are forced to claim a space in which to live and build their houses in the margins of the city through transversal interactions with the state and other institutions. Caldeira offers a general characterisation of those processes when re-examining and deciphering the logics of peripheral spaces in producing highly unequal and heterogenous cities in the Global South. The transversal logics angle does away with the traditional binary and simple dualistic opposition of formal/informal or legal/illegal when accounting for complex urban formations (Caldeira, 2017, p. 7). To unpack these dynamics, an analysis over time is fundamental to drawing out the simultaneous processes of improvement and reproduction of inequalities, and therefore, of injustice.

In drawing on these theoretical approaches, this article examines the social production of peripheral spaces by focusing on the multiple manifestations of violence and environmental risks while untangling the complex dynamics of both issues and how they generate unequal and harmful conditions for residents, thereby intensifying and reproducing inequalities.

3. Qualitative Research Methods in Violent Settings

This article draws on fieldwork conducted in Guatemala City in January and February 2018. It uses a qualitative approach with the support of Perpendicular, a Guatemalan social innovation laboratory that served as a key collaborator. Perpendicular worked in both communities in 2017, creating a participatory digital mapping illustration of the risks. Through their contacts, interviews were arranged with the leaders and other members of the community.

Conducting qualitative research in highly violent settings is both risky and challenging. It requires being flexible and having a clear understanding of the environment and the possible dangers for both the researcher and the interviewees. Thanks to previous work done by members of Perpendicular in the community and the trust they have gained, the fieldwork was successful. On the other hand, I was surprised as to how little I was myself prepared as a researcher to face the possible risks encountered in the field, and how this is seldom or openly discussed in academia (Goldstein, 2014).

Violence is a difficult and highly sensitive topic to talk about, and people are normally reluctant to discuss it openly. As a measure of protection and security for both the interviewees and ourselves, the interviews were always conducted inside the houses of selected members of the community, individually, and without the presence of any other members of the family in the room (Bashir, 2018). For the same reason, the residents interviewed will remain anonymous. Conducting interviews in a resident's home was another methodological opportunity to both observe and experience first-hand their living conditions and needs (Bashir, 2018, p. 640).

The fieldwork included 25 formal, in-depth, semi-structured interviews with residents of 5 de Noviembre (13) and Arzú (12). Semi-structured interviews are more appropriate in such contexts because they give the person more flexibility and space to choose whether or not to respond or share sensitive issues. To achieve a wide range of perspectives by gender and age, we interviewed 11 adult women, three of whom had teenage daughters, and seven adult men, two of whom had teenage sons and two younger boys. The focus of the interviews was on their perceptions of vulnerabilities and fears related to urban violence and environmental risks. However, many other types of violent and traumatic experiences emerged during the in-depth interviews. In addition, I consulted authorities from the municipality in zone 18 and other NGOs, such as Youth Against Violence, TECHO, and Innovaterra. Additionally, I draw on the results from the participatory digital mapping work done by Perpendicular to complement the information obtained through fieldwork.

It is impossible to ascertain a resident's perceptions of vulnerabilities and risks based on general surveys. Hence, conducting in-depth interviews in peripheral urban spaces is a unique way to examine a resident's daily life, experiences, and conflicts. I used inductive methods to assess the transcripts, mainly through thematic content analysis, while identifying common topics to discover general patterns in the data and assessing such patterns via my research questions and theoretical approach.

4. Precarious Settlements in the Ravines

Guatemala City, the largest capital city in Central America, is a city of great contrasts: It suffers from high levels of income inequality and extreme social-spatial segregation, resulting in urban exclusion (Ayala, 2014; Morán, 2011). According to the most recent census, the *municipio* of Guatemala—which is mainly urban—has an estimated population of 923,392 (National Institute of Statistics of Guatemala, 2018). Simultaneously, the metropolitan area accounts for the largest concentration of poor people per square metre in the country, with an estimated 412 precarious settlements (Secretariat for the Planning and Programming of the Presidency, 2015; see Figure 1). It is hardly surprising then that these "invisible inhabitants" were only included in the official statistics of the country for the first time in the last census (National Institute of Statistics of Guatemala, 2018).

For the poor urban classes who cannot afford adequate housing, squatting in risk-prone areas vulnerable to natural hazards has been their only option for decades, the best expression of the geographies of injustice so evident in the capital. Such is the case with the ravines surrounding the city, which comprise 42 percent of Guatemala City's territory (Mazariegos et al., 2014). The municipality of Guatemala is divided into 22 zones, with the greatest number of precarious settlements being in zones 3, 7, and 18 (Secretariat for the Planning and Programming of the Presidency, 2015). Zone 18 is the largest and most populous area in the northern part of the city. It is also considered the most violent and dangerous of the 22 zones in the capital.

During the massive 1976 earthquake in Guatemala (M = 7.6), those living in precarious settlements in the metropolitan area suffered the highest mortality rate (Gellert, 1996, p. 35; Miles et al., 2012, p. 368). The earthquake also marked a period of intensive rural-urban migration, exacerbated by years of civil war and genocide directed at the Maya population. Many survivors

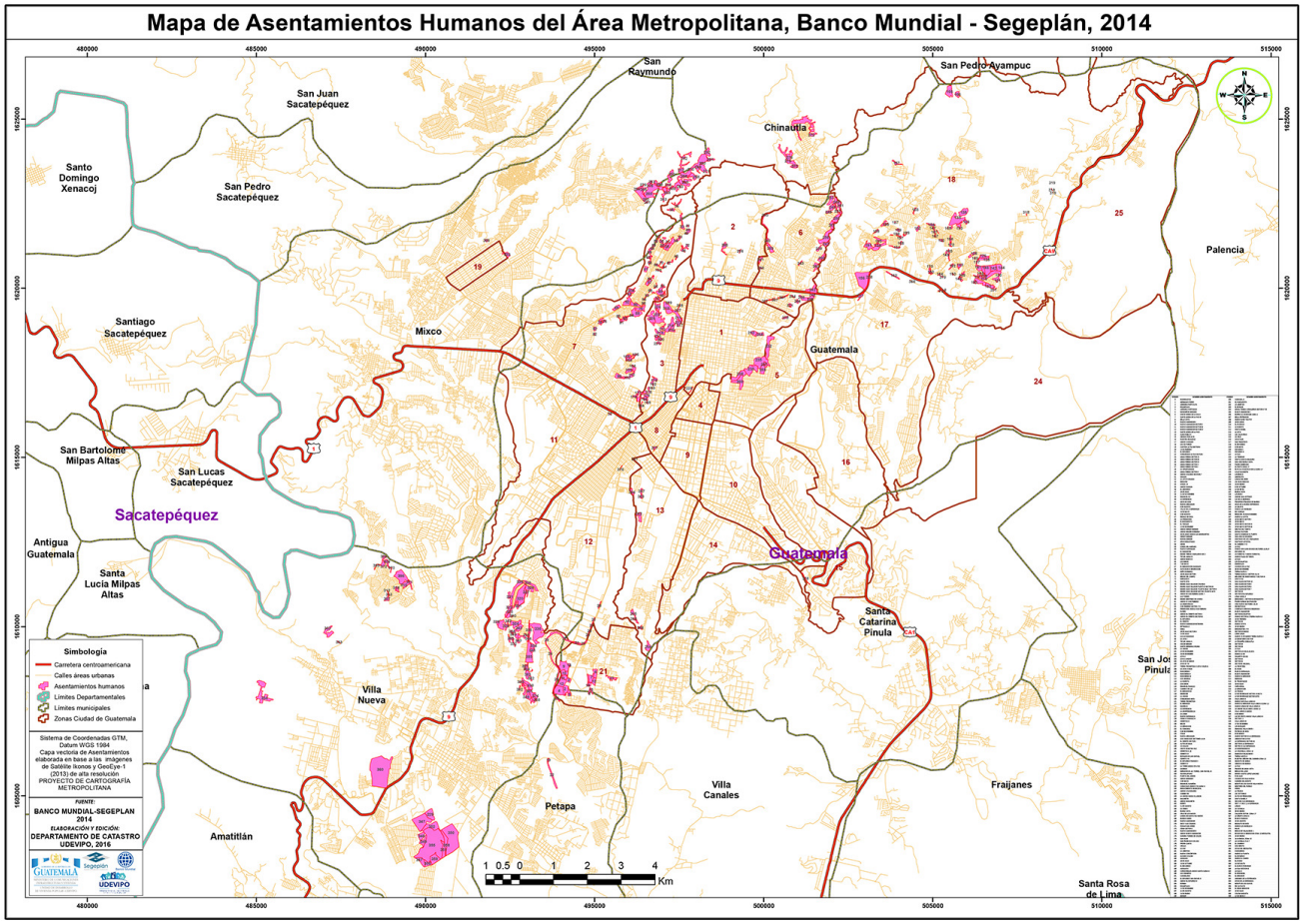

Figure 1. Map of precarious settlements in the metropolitan area of Guatemala City in 2014. Source: Secretariat for the Planning and Programming of the Presidency (2015).

from rural areas seeking to escape the violence and find new opportunities moved to Guatemala City, resulting in some of the more precarious settlements in the ravines (Morán, 2011, p. 46).

The communities examined in this article are situated in the ravines in zone 18 (see Figures 2 and 3). Arzú started to grow in 1995, while 5 de Noviembre was founded in a garbage dump in 2003. Both communities are characterised by self-built housing with limited and inadequate public services and infrastructure. The older areas in the upper parts of the ravine have better housing infrastructure than the newer ones. The communities are not homogenously poor and precarious since they are always changing, being transformed and sometimes improving (Díaz et al., 2000; Morán, 2011; Perpendicular, 2017a, 2017b; Roberts, 2010).

Housing, public infrastructure, and other services have improved over time thanks to community organisation and help from the municipality and the state, but especially through the support of NGOs such as TECHO. TECHO is a Latin American and Caribbean youth-led NGO seeking to eradicate poverty in popular settlements through the joint actions of residents and young volunteers. However, such improvements have always occurred from a marginal and excluded position. One of the major improvements is linked to the legalisation of the plots—contesting the official logic in transversal ways, as Caldeira (2017, p. 7) argues; a high percentage

Figure 2. Orthophoto of 5 de Noviembre, courtesy of Perpendicular.

Figure 3. Orthophoto of Arzú, courtesy of Perpendicular.

of the residents have been able to reclaim land titles for properties located in high-risk areas, where, supposedly, land titles would not have to be granted. In 5 de Noviembre, 54 percent of the lots have been legalised, and the same is true of 70 percent of the 329 existing lots in Arzú (Perpendicular, 2017a, 2017b). Simultaneously, urban marginality is expressed by the limited formal opportunities for employment, education, and access to health services.

5. "A Stray Bullet": Perceptions of Risks and Threats of Violence in Peripheral Urban Spaces

Violence is a disputed, complex, and "slippery" concept that is difficult to define (Moser, 2004; Scheper-Hughes & Bourgois, 2004). Even though it is impossible to develop strict typologies for the multiple manifestations of violence, the present article adopts the conceptual framework proposed by Moser (2004), who identifies four types of violence: political, institutional, economic, and social violence. Political violence is associated with both state and non-state violence (e.g., political assassinations); institutional violence is associated with the state and other "informal institutions" (e.g., extrajudicial killings, physical or psychological abuse by health and education workers, the lynching of criminals by community members); economic violence can take the form of, for instance, street theft, armed robbery, drug trafficking, assaults, killings, and rape occurring during the course of committing economic crimes; finally, social violence can take the form of domestic violence, sexual (rape) violence, child abuse, and general incivilities, such as instances of road rage or street confrontations (Moser, 2004, pp. 4–5). Within this broad typology, many other overlapping types of violence can also be identified in the everyday lives of the residents of such peripheral communities, including structural violence.

Residents in both communities reported an overwhelming fear of violence, and hence, they constantly feel at risk and a sense of insecurity in their everyday lives. These perceptions of violence, as well as actual manifestations of it, take place in their homes, inside, and outside the community, and in other parts of the city. Many residents expressed a general sense of pessimism, saying that "violence is everywhere," "the violence will never end," and elaborated that "regarding the *maras* [gangs], we are lost, they are bad for your health." One middle-aged man from Arzú added the following observation:

> Wherever you go into the city, it is dangerous; I don't know why [just this place] here is characterised as a "red zone." If we talk about red zones, all the *colonias* and other parts of the city are also dangerous.

The most typical type of insecurity is the fear of being a victim of a "stray bullet" in the streets, whether by the *maras* or by any of the diverse array of violent actors and ordinary criminals found on the streets (Camus et al., 2015; Winton, 2004, p. 138). The easy availability of firearms and the rampant levels of impunity and corruption are especially reflected in such urban spaces (Levenson, 2013).

The following is a list of risks and insecurities related to violence in both Arzú and 5 de Noviembre, according to community interviews:

- *Maras* and gangs/shootings "stray bullet'';
- Extortion;
- Rapes;
- Homicides;
- Robberies/house burglaries;
- Domestic violence;
- Verbal and physical violence among neighbours (gossip, insults, fistfights, alcoholism, drug use);
- Violence on the streets (fights);
- Police abuse (insults);
- Insecurity, red public buses (extortion, murders, robberies);
- Forced recruitment of minors to join the *maras*;
- Harassment and intimidation by the *maras* (young boys and girls);
- High-speed cars and motorcycles, accidents on the main streets.

The informants noted that the *maras* (18 and Salvatrucha) and other minor gangs are the most "visible" problem in terms of insecurity, as they are considered the main protagonists of violence (Bruneau et al., 2011; Levenson, 2013; Winton, 2005; Wolf, 2017). In both communities, the *maras* control the nearby surroundings; physically they are quite present (see Figure 4). Their battles for control of the drug market and territory regularly involve shootings, which profoundly impacts the daily lives of the residents of these communities, especially during the night, "when the *maras* reign," considered the most dangerous time of the day (Jütersonke et al., 2009).

Some groups or individuals are more at risk from certain types of violence than others (Moser & McIlwaine, 2014, p. 335; Winton, 2004, p. 166). For example, young boys (and their families) are afraid of being victims of the forced recruitment of minors to join the gangs. This was the case with a blacksmith in his late 30s in Arzú. He had been shot by a member of 18, the gang that rules the area, a few years ago. The gang member came to recruit his young cousin by force, who was working in the man's workshop at the time. His cousin escaped, but he himself was not so fortunate. The young *marero* faced him and began shooting without mercy: Four bullets hit him in the arms (two in each). While trying to escape, a final bullet hit him in the spinal cord—and it is still there. He can no longer walk and is condemned to live in a wheelchair. Now his life is limited to a 5 × 5 space; he is disabled, suffers from diabetes, and does not receive any support or economic aid from the state. His options are quite limited. His extended family—parents, wife, and two adult

Figure 4. The community in front of Arzú, some parts of which are controlled by gangs.

sons—are his only means of support. He seldom leaves the house, as the logistics of climbing the steep hill where he lives are complex. Structural violence overlaps in the life of this man with other types of violence, whether direct, indirect, visible, or invisible, in the crude realities of the injustice of spatiality.

Younger boys are also afraid of older *maras* in the streets because the gang members repeatedly bully and harass them in the form of verbal or physical abuse. Eventually, the youngsters also begin imitating certain practices of the *maras*. During our fieldwork, one of the boys from the community "jokingly" painted some graffiti with the message "soccer field MS 13" (see Figure 5). He reproduced the same symbolic signs of power used by the *maras* in the territories controlled by them in his community and the only precarious public space frequented mainly by boys.

For women in general, and younger women in particular, the *maras* and other gangs represent a constant threat, as expressed by one young female resident from 5 de Noviembre, aged 12:

Figure 5. Soccer field in 5 de Noviembre.

> I am afraid because there are a lot of gangs and [because of] all the things that have happened. Sometimes I tremble and I can't walk fast [enough], and it's when I should walk faster, so I won't show them I am afraid. Otherwise, they can harm you or threaten [that] you [need] to be their "friends."

On the other hand, some residents also expressed compassion for the *maras*, acknowledging that they are the product of social exclusion and a lack of opportunities, "without parents, resources and raised on the streets" (see Snodgrass-Godoy, 1999). In the absence of the state, the *maras* can also become allies or protectors of the community (Koonings & Kruijt, 2009, p. 20; Winton, 2004). As is the case in 5 de Noviembre, many were literally born and raised in a garbage dump in the ravine. Back in 2003, a squatter nicknamed Colocho, the leader of a local *mara* faction, took over the terrain with the support of the National Coordination of Marginalized Communities and Areas of Guatemala (CONAPAMG). The terrain was subdivided after a complex process of negotiations between the leader and the squatters. A middle-aged woman who was one of those original squatters offered the following recollection:

> I heard from a woman that somebody was giving away lots. So, I came; it was a garbage dump here. I asked a group of people if they were giving out lots. A man said to me: "Look, if you want a lot, nobody is giving it for free; you have to come and fight for it. And if you are brave enough to fight, you must come and stay, day and night, taking care of your space, rain or shine"….I came with my newborn baby because I was in need.

Colocho was the guiding power in the community for ten years. The residents of 5 de Noviembre paid him a monthly fee in exchange for protection. Some basic services were introduced and built under his guidance. He organised the division of labour and forced the residents to help construct and improve the infrastructure and collect garbage (sometimes in coercive and violent ways). He also organised social activities on special occasions (Mother's Day, Children's Day). Until his death, as the result of a territorial dispute, Colocho oversaw the organisation, security, and protection of the community. Residents mentioned, with mixed and controversial feelings, how well organised the area had been under his rule, despite his authoritarian and intimidating practices. A level of "organisation" is currently absent in the community. As Moser (2004, p. 171) notes, "the drug faction is given anonymity and freedom to conduct business, and the community in return receives internal security and often a range of services."

Gender-based violence is present in both communities, less "visible" and not as openly discussed as other types of violence. For young women, especially teenagers, their greatest fear and insecurity is sexual assault, which affects their freedom and mobility. The feeling of fear in a certain space is socially constructed and conditioned by various gendered power relations (Winton, 2004). Consider as an example the story of a 23-year-old single mother raped at her daycare when she was around five years old:

> The son of the lady who was running the daycare raped the girls. He was sent to jail, but now he is out. He raped me when I was little. My mother told me she found blood in my clothes and took me to the doctor. The doctor told my mom that she should immediately get me out of there. I vaguely remember him asking me if I wanted this or that. But when you are a child, you don't know what is good or bad. Now, the father of my daughter—he is very *machista* [sexist]; he wanted me to be a virgin when we got together. But since I was not, because I was raped when I was little, he left me. I didn't know I was pregnant when he left me. That is why I am a single mother now: Because he wanted me to be a virgin.

Her traumatic experience shows the suffering of women abused throughout their lives in a succession of different and toxic types of violent acts, both outside and inside the home, and deeply embedded in the *macho* culture (Hume, 2004). In public spaces, mothers are particularly worried about the safety of their daughters, protecting and controlling their movements most of the time. Another woman from 5 de Noviembre shared with us another painful experience involving her only daughter: "About five years ago, a man attempted to rape my 8-year-old daughter. I was living in a *champita* [metal zinc house] down there. It was my neighbour." Some families are forced to share a communal shower: A dangerous space where young girls are at risk of being raped.

Women in Guatemala are especially vulnerable to sexual violence, with the country having one of the highest femicide rates (the killing of females by males just because they are female) in the world. Sexual violence occurs there with widespread impunity, which reinforces inequality by further entrenching culturally accepted forms of discrimination; it is one of the main barriers to social justice (Torres, 2008). In seeking to understand femicide, it is important to understand the systemic impunity and structures of power in Guatemala and how femicide continues to be practised in the context of post-conflict violence (Carey & Torres, 2010; Godoy-Paiz, 2012; Sanford, 2008). Moreover, the political concept of feminicide, as Sanford (2008, p. 113) asserts, implicates not only the perpetrators but also the state and judicial structures for not protecting the rights of women.

Another risk, and a strong perception of insecurity, originates from the generalised practice and culture of extortion, or the fear of extortion, by the various gangs or other criminal urban actors. Extortion is a sign of a weak state; it is a fundamental part of the parallel criminal economy existing in Guatemala. One young woman

in 5 de Noviembre talked about how insecure she feels in the community because of this practice: "My old neighbour's husband was killed because he didn't pay an extortion demand; then she left because she was afraid they would kill her family." Extortion is also an expression of the authority that organised crime can exercise over a community. The main targets of extortion are small businesses and various modes of transportation (red buses, taxis), but the chance of being a victim of extortion is always present (O'Neill, 2019). The practice of extortion is so embedded in this parallel illegal economy that some residents mentioned that it has also become a practice recently adopted by members within the same family.

The informants' strong perceptions of insecurity and fear are also largely shaped by mass media's portrayals of violence. Most of the interviewees highlighted how insecure and dangerous the city was by referencing their first-hand experiences, but they especially mentioned that their perception of fear was constructed and influenced by the news (González-Izás, 2017, p. 123; Huhn et al., 2006). Television news plays a fundamental role in exacerbating a constant climate of fear. Shootings, homicides, kidnappings, and assaults dominate stories in the media and shape the image of "no-go spaces," deepening the stigmatisation of certain areas like zone 18, considered to be a "red zone." Hence, news stories feed and reinforce the geographies of fear and insecurity. Moreover, the fear of crime and sensationalism, as Huhn and Warnecke-Berger (2017, p. 3) note, are part of a political agenda that justifies increased social and geographic segregation, feeding the needs of the private security industry and validating the so-called *mano dura* ("heavy hand") policies in a "struggle for power and social recognition, privileging some social groups while excluding others."

The worst consequences of people feeling so insecure and fearful are extreme isolation and seclusion within their houses (with some differences related to age and gender). The problem, as expressed by a middle-aged man in Arzú, is as follows: "When the settlement started, we were organised; we took turns at night patrolling the streets. But that was 21 years ago. Now, with the gangs, the younger generations are afraid." Fear and insecurity divide and fracture community organisation and weaken solidarity and trust among residents. As research on other Central American cities has shown, the close interrelationship between social exclusion and violence limits the capacity of communities to organise (Muggah, 2014; Pérez-Sáinz, 2015).

The residents' main strategies for coping with the omnipresent threats of violence involve survival efforts, limiting their lives to a reduced ratio of movement and activities with severe restrictions on their personal freedom. Based on their perceptions of risk, they build mental maps of the most dangerous areas and avoid those streets (McIlwaine & Moser, 2007). The "normalisation" of violence and the stigmatisation (through the mass media) of certain areas of the city, considered "red zones" (like zone 18), has had negative consequences for residents of those communities, reinforcing their exclusion (O'Neill, 2019).

As Sanford (2008, p. 108) claims, it is "against this backdrop of genocide and impunity that Guatemalans today find themselves living in an extremely violent country." The myriad types of violence and the consequences of such violence in both communities can partly be explained as legacies of a violent post-conflict society, where processes of exclusions, inequalities, and vulnerabilities are constantly produced and reproduced, especially in the more marginal urban spaces. Such communities are caught in the "cross-fire," subject to manipulation by the state, various drug groups, and a highly corrupt elite political sector in a vicious cycle of exclusion, violence, and endemic poverty. The negative impact of the interrelationship between multiple types of violence—whether economic, social, institutional, gender-based, or structural—and the generalised perception of insecurity and fear in these marginal urban spaces has negative consequences for the lives of the residents in both communities.

6. Occupying the Ravines: Environmental Risks, Structural Violence, and the Injustice of Spatiality

The lack of state policies to support popular housing and urban-rural migration, to mitigate poverty and marginalisation, has led to the occupation and consolidation of hazardous and risk-prone areas by low-income populations in Guatemala City. Through the lens of structural violence (Farmer, 2003, p. 50; Galtung, 1969), I will now address these people's perceptions of environmental risk. This approach makes it possible to examine the root causes of spatial injustice and assess how inequalities are embodied in the interrelated risks and suffering that residents are exposed to because of their vulnerable condition.

Two main types of environmental risks have been identified in both communities. The first type includes natural hazards, such as tropical storms, hurricanes, and heavy rainfall during the rainy season (from May to October), as well as earthquakes and volcanic eruptions (Perpendicular, 2017a, 2017b). The second type includes everyday hazards (e.g., poor sanitation, air pollution, water and garbage pollution, precarious housing; see Pelling, 2003, p. 16). The following is a list of the major risks and insecurities related to natural and everyday hazards in both Arzú and 5 de Noviembre, according to community interviews:

- Landslides;
- Flooding;
- Sewers and wastewater discharged into rivers;
- Garbage pollution;
- River pollution;
- Rats and cockroaches attracted by the garbage;
- Diseases and allergies caused by pollution;

- Lack of infrastructure (footpaths or stairs), dangerous to descend the hill, muddy in the rainy season and dry and slippery during the wet season.

Some people are more at risk than others depending on where they live in the ravine and the condition of their houses, which affects them in different ways. Ravine dwellers located next to the river have a greater perception of risk because they are more vulnerable to flooding. A single mother from 5 de Noviembre described her fears during the rainy season:

> They say I am not at risk, but I think I am. Especially when I hear the noise of the pouring rain, because I know, with time, the soil might start to loosen, since this land was a garbage dump before we came here. Now it looks nice because we have improved the conditions, but that ditch over there fills up with water every time it is pouring. I am afraid that this house they built for me will get flooded.

The residents next to the river are also closer to the garbage dump and more exposed to pollution and other hygienic problems (e.g., rats, cockroaches). Many interviewees mentioned rats, one of the most distinct symbols for violence. The flooding of the river is also linked to the accumulation of garbage in both communities. A resident of 5 de Noviembre mentioned that one of the greatest risks for them was "pollution from the river during the dry season, since the river gets flooded and there are lots of rats" (see Figure 6).

Another serious environmental hazard in Guatemala City is the direct discharge of untreated sewage into the rivers. Both the garbage and the sewage create a highly polluted environment in both communities and constitute the main source of infection for diarrhoea and skin and respiratory diseases, especially common during the rainy season (Ministry of Environment and Natural Resources, 2017). The location of these communities in the ravines makes them even more vulnerable because those spaces serve as a "natural drainage" system for the city: rainwater as well as domestic and industrial sewage (Gellert, 1996). For example, all the wastewater from Alameda Norte Boulevard is directly discharged into the river running through the 5 de Noviembre community, producing a foul smell in the houses next to the wastewater and causing pollution.

Potable water distribution and access to electricity are also irregular, depending on the family's income and their location in the ravine. Since many residents have precarious jobs or are unemployed (Perpendicular, 2017a, 2017b), the strategy for accessing free electricity is to install so-called *diablitos*. One male resident explained that they are called *diablitos* ("small devils") because "the truth is we are stealing the electricity… we are not paying for it." These illegal connections are the source of other risks: They can trigger accidents because they overload the system and can cause fires (Perpendicular, 2017a, p. 6). *Diablitos* exemplify how the state allows certain illegal practices, which then exempts it from the responsibility of providing those services (Nygren, 2018, p. 151).

Figure 6. View of the garbage dump in the ravine in 5 de Noviembre, courtesy of Perpendicular.

The installation of basic services and infrastructure improves over time thanks to community organisation: People rely on their own efforts and labour combined with a certain amount of aid gradually coming from the municipality, the state, and TECHO. For example, after more than 20 years of occupying the ravine, more than half the residents of Arzú now have access to a very precarious system of potable water, electricity, and housing (Perpendicular, 2017a, 2017b). Some parts of Arzú have better infrastructure, like cement sidewalks and stairs, which reduces risks and provides security for residents (see Figure 7).

One important measure for reducing risks and preventing a major disaster due to landslides is the construction of retaining walls. Many of them have been built by Unity for Popular Housing (UDEVIPO) and/or TECHO. The retaining walls are quite important for security reasons, but also because they are required before residents can be eligible for a land title if the lot is in a high-risk area (Gellert, 1996, p. 39). Residents feel quite secure when they have a retaining wall in front of their houses, even if it is a false sense of security in the case of a major earthquake or any of the other extreme environmental natural hazards so common in Guatemala.

By analysing the production of space in the ravines and improvements over time, it is possible to decentre official logics of urban spaces, as proposed by Caldeira. Residents engage in activities formerly considered illegal, gradually making their homes and the neighbourhood part of the legal system through communal struggles (e.g., access to land titles, certain public services). Over several decades, through their organisation and labour, they have improved their living conditions with only marginal support from the state, the municipality, and various NGOs. However, the logistics for this improvement and their efforts at mitigating the risks are embedded in a system that does little else to offer further structural solutions for the precarious situation, vulnerability, and exclusion (e.g., relocation to a safer place) faced by so many residents of the ravines. As Nygren (2018, p. 151) asserts when discussing extreme inequality and processes of urban exclusion in the case of Mexico, by keeping the residents of precarious settlements in the legal margins "authorities support their social fragility and, in this way dissipate their collective demands for justice.''

7. Conclusion

This article has examined the spatial production of (in)justice and exclusion in two communities located in the ravines of Guatemala City, focusing on the multiple perceptions and manifestations of violence and environmental hazards and vulnerabilities. In addition to analysing the injustice of spatiality and the reproduction of inequalities and suffering, the article explored the production of peripheral urbanisation, with special attention paid to local agency. The notion of peripheral urbanisation is useful for understanding the complex dynamics and transversal logic shaping such marginal communities

Figure 7. Contrast between the two main streets in Arzú: The cement stairs were built by active residents with the support of the municipality.

and the importance of avoiding normative perspectives of formality and informality when studying such heterogeneous spaces.

Residents in the precarious settlements of Arzú and 5 de Noviembre, in Guatemala City, are emblematic of fragile cities and post-conflict societies characterised by a state that cannot protect and provide basic rights and security to a large number of its citizens. Residents in such precarious settlements must draw on their own resources to survive by successfully navigating overlapping forms of violence and environmental risks, thereby unsettling the dynamics of the system. Structural violence is embedded in the political, economic, and social system in Guatemala, reproducing inequality and exclusion. The state and municipality do little to tackle the real causes of poverty and problems faced by ravine dwellers; they tolerate them and provide a certain amount of infrastructure and services that only serve to reinforce the vulnerability and poverty of residents without taking any serious steps to improve the root causes of the risks they face, their vulnerability and their extreme poverty.

This article has demonstrated how residents in communities like Arzú and 5 de Noviembre are trapped in "normalised" violent, pernicious, and hazardous urban spaces, in a negative cycle that reproduces the structures of inequality and exclusion. Multiple and complex manifestations of violence fracture public space and community cohesion and are deeply disempowering. Persistent violence, or the threat of it, generates constant fear, suffering, insecurity, and vulnerability. It also generates more violence in response (McIlwaine & Moser, 2007). The cultural geographies of fear and the stigmatisation of "red zones" as the hotbeds of insecurity and violence in the city, all the time fed by the mass media, also reinforce the exclusion of ravine dwellers.

Focusing the analytical lens on the injustice of spatiality and the historical, socio-political, and structural processes that produce and reproduce such spatial injustice makes it easier to understand the dynamics of marginalisation and injustice in peripheral spaces in Guatemala City. Deciphering these processes helps to ground the search for spatial justice and shine a light on the urgent need for better access to democratic rights in the city, as well as the need to promote more inclusive urban planning practices. Even if spatial injustice has been historically and socially produced, it can and must be changed.

The pre-existing structural problems (e.g., poverty, inequality, corruption, impunity, insecurity) have only been exacerbated during the coronavirus pandemic, affecting especially the urban poor and deepening their economic poverty and exclusion. Concerning gender-based violence in Guatemala, research suggests a significant increase in domestic violence during government-mandated lockdowns (Iesue et al., 2021). Little empirical research has been done on the consequences of the pandemic for ravine dwellers in Guatemala City. Despite limited government funding for social programmes targeting the city's vulnerable populations, the lack of a consolidated registry of people has been an obstacle to reaching those most in need. Thus, based on the high level of informal organisation in such spaces, where residents are forced to earn their living by their own means daily, and without proper safety nets to rely on, most likely the consequences have been devastating, deepening, even more, the profound inequalities that existed before the pandemic.

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Conflict of Interests

The author declares no conflict of interests.

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Article

My Brother the "Other": Use of Satire and Boundary-Making by Venezuelan Migrants in Peru

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Abstract
While the criminalization and hyper-sexualization of Venezuelan migrants and refugees across South America have received growing scholarly attention, fairly little is known about the coping strategies of migrants in this context. In this article, we build on quantitative and qualitative data from a survey (N = 100), 72 in-depth interviews, and five focus groups with Venezuelan immigrants in five Peruvian cities, collected between 2018 and 2020, to explore how they make sense of, and react to, negative shifts in public opinion on immigration and the criminalization of Venezuelan nationals. We identify two broad coping mechanisms: (a) opposition to their criminalization, including its satirical ridiculing, and (b) intra-group boundary-making and "othering." Our findings make an important contribution to the literature on migrant responses to criminalization and intra-group relations in the Global South.

Keywords
coping; discrimination; intra-group othering; satire; South-South migration; Venezuelan displacement

Issue
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1. Introduction

In the past five years, scholars have characterized Venezuelan displacement as a "migration of despair" (Paez & Vivas, 2017), in response to the country's deepening economic, political, and humanitarian crisis, which has been stoked by falling international petroleum prices and opposition to President Nicolás Maduro's governance. As of October 2021, over 5.9 million Venezuelans have fled their homes due to generalized violence, poverty, and lack of access to health and education, among other reasons (R4V, 2021), rendering it the second-largest and fastest-growing displacement scenario worldwide (Freier & Parent, 2019). The nature of this displacement is largely regional, with over 4.8 million living in Latin America and the Caribbean (R4V, 2021).

A growing body of literature on Venezuelan displacement across Latin America has documented integration processes in receiving countries (Aliaga et al., 2020; Freier & Pérez, 2021; Pérez & Ugarte, 2021). In recent years, a topic of increasing interest has been the criminalization of Venezuelans across the region (Blouin, 2019; Concha, 2018; Freier & Parent, 2019; Freier & Pérez, 2021; García, 2020; Pérez & Freier, 2021). In Peru more specifically, studies tend to examine Venezuelan men and women's criminalization experiences in both the public sphere and in the workplace (Freier & Pérez, 2021), as well as the interconnectedness between Venezuelan women's hyper-sexualization and criminalization (Pérez & Freier, 2021; Pérez & Ugarte, 2021). While this migration is still unfolding, and notwithstanding the research conducted, we know relatively little about the reactions and coping strategies of migrants in this context.

Contributing to the study of how Venezuelans make sense of, and react to, negative shifts in public opinion on immigration and their criminalization in everyday life, this article first asks how these migrants in Peru approach their criminalization. Here, we explore

respondents' reactions to damaging changes in public opinion regarding how they are positioned in Peruvian society as delinquents and/or undesirable subjects. We find two broad types of reactions: (a) satirical opposition and (b) intra-group boundary-making. In light of these responses, a second question that arises is: Are there specific socioeconomic and political conditions in Peru that have hastened such coping mechanisms?

Overall, we argue that Venezuelan migrants' use of satire and intra-group boundary-making developed as a response to changing policy and political conditions in the host country, which increased overall instances of discrimination and criminalization and created barriers for their socio-economic integration—particularly their access to gainful employment. As "migrants of despair," the main reason for choosing Peru as a destination was linked to the country's early policy that granted them temporary work permits (Aron & Castillo Jara, 2020; Freier & Castillo Jara, 2020). However, this reality was short-lived. Our research shows that Venezuelans who arrived before June 2019—when the policy changed—sought to underscore their value, on the one hand, while differentiating themselves from later-arriving compatriots, on the other. Our findings demonstrate that, for Venezuelan migrants in Peru, specific coping mechanisms surfaced as a response to their socioeconomic precarity in an increasingly hostile climate. This case study contributes to the literature on migrant responses to criminalization and intra-group relations in the Global South.

The remainder of this article is structured as follows: The second section provides a review of the literature on migrant criminalization and intra-group boundary-making. We follow this with a brief overview of Venezuelan emigration to Peru and its increasing criminalization. The fourth section describes our methods. We then present our findings, followed by a discussion of our data. The final section concludes with some suggestions for further research on this subject.

2. Migrant Criminalization and Intra-Group Boundary-Making

Two strands of literature serve as a prism for our analysis. The first, on migrant criminalization, includes research primarily from the Global North, as well as some incipient scholarship from the Global South. The second, on migrants' use of satire and intra-group boundary-making as coping mechanisms, is comparatively less developed overall and nearly inexistent in the Global South.

2.1. The Criminalization of Migration

Historically, the literature devoted to immigrant criminalization has focused on south-north or east-west migration (Armenta, 2016, 2017; Escobar, 2016; Korteweg, 2017), where analyses have contributed to both theoretical and empirical understandings relative to judicial and legal processes and national security (Abrego et al., 2017; Armenta, 2016; McDowell & Wonders, 2010), as well as to immigrants' integration experiences (Korteweg, 2017; Van Klingeren et al., 2015). As immigrants are positioned as social threats and/or criminalized, this construction might occur through both migration status and/or race, depending on their country of origin (Brown et al., 2018). Tending to the voices and experiences of female migrants, another set of studies has examined this group's criminalization at the intersection of migrant condition and gender (Coşkun, 2018), and/or stigmatization based on their choice of employment, specifically focusing on sex workers (Agustín, 2006).

Extant scholarship has revealed an intensification of overall migrant criminalization in recent years (Melossi, 2003; Parkin, 2013), with some research identifying how immigrants are constructed as threats and/or "othered" (Bourbeau, 2011; Menjívar & Abrego, 2012). On this note, studies reveal a link between migrant criminalization and racialization processes (Abrego et al., 2017; Armenta, 2016, 2017; Armenta & Vega, 2017; Provine & Doty, 2011; Stang & Stefoni, 2016). For example, Brown et al. (2018) have examined negative media portrayals of Latino immigrants—vs. African Americans—in the United States. Altogether they find that, far from constituting independent processes, discrimination goes hand in glove with racialization. Likewise, the authors posit that, just as discrimination and criminalization are racialized, they are also gendered. As Korteweg (2017, p. 432) argues, "the resulting racialized gendered population becomes the subject of abjection onto whom generalized social problems are projected."

By contrast, the literature on the criminalization of migration in the Global South is incipient (Barbero, 2019; Freier & Pérez, 2021; Oliveira Moreira, 2020; Pérez & Freier, 2021; Stang & Stefoni, 2016). With the recent unprecedented level of Venezuelan displacement, scholarship has underscored the overall criminalization of Venezuelan migrants in the region (García, 2020; Pineda & Ávila, 2019). In Peru, research has documented the country's shift in immigration governance—from an open reception of migrants to heightened securitization measures (Aron & Castillo Jara, 2020; Freier & Castillo Jara, 2020)—as well as its effect on the criminalization of Venezuelan migrants and refugees (Condori et al., 2020; Freier & Pérez, 2021; Pecho Gonzáles, 2020; Pérez & Freier, 2021). Studies have also documented the "othering" of Venezuelan women, specifically at the intersection of gender, socioeconomic level, nationality, and migration status (Fernández, 2020; Pérez & Freier, 2021; Pérez & Ugarte, 2021).

2.2. Coping Through Satire and Intra-Group Boundary-Making

Scholars have long studied how vulnerable populations use humor as a coping mechanism (Cardeña, 2003; Husband, 1977; Littlewood, 1993). Specific to migrants,

Van Ramshorst (2017, p. 14) highlights humor as a mechanism "by which migrants negotiated their vulnerability while also providing a shared source of solidarity between and among them." Along these lines, Gosin (2017) and Koskela (2021) have documented migrants' responses to discriminatory situations in the United States and Europe, respectively, where satire is employed as a coping tactic to deflect against unequal positioning (Koskela, 2021, p. 254). More specifically, in her study of Afro-Cubans in the United States, Gosin (2017, p. 7) points to strategies, such as humor, anger, and confrontation, which embody a "wry humor that resists racial hierarchies and processes of racialized subject-making." In this case, the satire is directed both at non-Afrodescendant Cubans, as well as at host nationals who confuse some Cubans' "Blackness" with that of other Afrodescendants. Sarcastic humor is thus a manifestation of migrants' resistance and agency. By contrast, in his study of African and Asian immigrants in Europe, Koskela (2021, p. 254) finds that their use of humor in deflecting racism, for example, is less about claiming superiority, and more a "plea for equality." More broadly, as Van Ramshorst (2017, p. 17) has suggested, "humour is, ironically, a serious topic….Joking and laughter are not only political acts but reveal deeper feelings and dispositions about political subjects." In this way, humor and/or satire may be both a shared style of communication among migrants, as well as a defense shield against their detractors.

Intra-group boundary-making constitutes another response by immigrants to marginalization and/or integration processes. In the case of Ecuadorean migrants living in Italy, Boccagni (2014) has termed their intra-group distinctions as "selective disalignment" to describe the way one cadre of migrants sets itself apart from another less desirable national cohort. Focusing on North Africans in France, Schiff (2021) has studied the relationship between new and "established" migrants, examining how each group uses discourses about itself in its positioning both in French society and among their first- or second-generation compatriots. Similarly, Fathi's (2014) research on female Iranian medical doctors and dentists in Britain depicts how migrants position themselves against their peers in the host country. Finally, the work of Alba et al. (2014) on Mexican migrants in the United States reveals that specific markers, like higher education, intermarriage, and geographic mobility, create intra-group distancing among Mexican-Americans.

Specific to research in the Global South, Stang and Stefoni's (2016, p. 58) study on migration between Colombia and Chile also finds micro-boundary-creation practices among migrants, where class origin plays a key role, and social organization distinguishes against those who are "bad" or delinquent, pitting white and middle-class Colombians, for example, against those of color. In Peru, Loayza (2020) has documented intra-group segregation within the Venezuelan population, with some Venezuelans in Lima engaging in public demonstrations, holding banners that apologize for their compatriots' poor behavior, and others settling in cities with fewer Venezuelans, thus curtailing negative comparisons.

In summary, the research thus far on both migrant criminalization and intra-group boundary-making has more narrowly focused on south-north and east-west experiences. The Venezuelan displacement phenomenon in the region offers a vital opportunity to examine both of these dynamics in a south-south migration context.

3. Overview

Although previous emigration waves occurred under former Venezuelan President Hugo Chavez, the economic, political, and humanitarian crisis in Venezuela worsened after his death, as well as with Nicolás Maduro's ascension as president. Along with the drop in oil prices between 2013 and 2016, economic mismanagement caused "chronic shortages of food, medicine, and other basic necessities" (Van Praag, 2019), and violence and organized crime increased (Freier & Parent, 2019). As the aforementioned situation worsened, Venezuelans increasingly migrated to survive (Paez & Vivas, 2017), mostly seeking out work and a steady income for themselves to send remittances to family members back home (Caritas, 2018). In this context, Colombia and Peru became the top two destinations in Latin America for Venezuelan migration. Currently ranked as the country with the second-largest share of displaced Venezuelans in the region, Peru has received more than 1.2 million migrants as of October 2021 (R4V, 2021).

Aron and Castillo Jara (2020), as well as Freier and Castillo Jara (2020), have both documented two distinct phases in Peru's policy and political reactions to Venezuelan displacement. In the first one, the government and the overall population adopted a welcoming stance. Many middle- and upper-class Peruvians had a long-standing relationship with Venezuela as a safe haven during the country's internal armed conflict with the Shining Path terrorist group in the 1980s. Overall, under the short-lived Pedro Pablo Kuczynski administration (2016–2018) and through the beginning of Martín Vizcarra's assumption of presidential duties (2018–2020), Venezuelans were welcomed by both free-market-oriented governments with no love lost for Maduro's revolutionary socialist and authoritarian regime (for a brief review of Peru's tumultuous past five years see Castedo, 2020; Vergara, 2020).

By 2019, as Peru's sociopolitical crisis spiked in the aftermath of corruption scandals, ongoing political gridlocks between Vizcarra and the legislative branch, as well as inter-party conflicts, the rate of Venezuelan migration to the country remained unabated. In this highly-charged context, media outlets engaged in increasingly sensationalist reporting on Venezuelan-perpetrated crimes (Freier et al., 2021a). Not limited to newspapers, television programs and social media outlets also contributed

to the criminalization of Venezuelan immigrants and the dissemination of fake news (Freier et al., 2021a). The effect on public opinion was stark. Indeed, research on Venezuelans in Peru in the past four years has shown that they have been positioned as unworthy, unsavory, and/or criminal, deeply affecting their integration experiences (Freier & Pérez, 2021; Pérez & Freier, 2021).

Parallel to criminalization processes by the media and public, the government shifted its earlier welcoming stance to implementing increasingly restrictive entry requirements by mid-2019 (Freier & Castillo Jara, 2020). By early March 2020, a global pandemic was declared and the Peruvian government's hardened position, relative to the presence of its northwestern neighbors, was highly visible. While the Vizcarra administration doled out small-scale bonuses to Peruvian nationals, Venezuelan residents did not have access to such help, or to government-issued humanitarian aid (Freier et al., 2020). Although it seems that the criminalizing narratives in the media lost prominence vis-á-vis reporting on Covid-19 (Freier et al., 2021a), the repercussions of this criminalization on public opinion continued to be serious. In early 2021, a representative survey found that most Peruvians believed that about half of all Venezuelans were criminals (Freier et al., 2021b). The available statistics, however, suggest that Venezuelans commit significantly fewer crimes than Peruvian nationals, with less than 0.1% of the Venezuelan population incarcerated in early 2021 (Freier & Rosales Krumdieck, 2021).

4. Methods

Between 2018 and 2020, we collected both quantitative and qualitative data via a survey (N = 100), as well as 72 in-depth, semi-structured interviews and five focus groups, which took place in five Peruvian cities with the largest concentrations of Venezuelan migrants: Arequipa, Cusco, Lima, Tacna, and Trujillo. To recruit the study's participants, we employed snowball sampling, utilizing our contacts with international aid organizations, NGOs, and other personal relationships.

Surveys were administered using a tablet, and applied to both Venezuelan men and women, with primary questions centered on basic demographic data, family work history, experiences with discrimination, and mental health. Survey results for both men and women were later tabulated using the STATA statistical software.

Interviews were conducted exclusively with women, as part of the broader study sought to focus on their particular experiences with socio-labor integration. Interview questions focused on the migration journey, as well as on overall integration experiences. On average, taped interviews lasted 1.5 hours. To contrast our interview data with women, we also conducted five focus groups (one in each city) with men, including questions similarly focused on socio-labor integration experiences. Averaging 10 men each, focus groups lasted approximately two hours. Two facilitators were present—one to lead the discussion and the other to observe and take notes (also documenting verbal and non-verbal reactions). As with the interviews, focus groups were taped, transcribed, and analyzed along the themes/domains noted.

Approved by the Universidad del Pacífico's ethical review board, interview and focus group participants provided their informed consent before data collection. Finally, to protect our participants' privacy, we refer here to subjects as either male or female and share the city where we met.

5. Results

In this section, we share relevant descriptive data collected from our survey, interviews, and focus groups.

5.1. Survey Results

Applied to 42 men and 58 women, our survey revealed descriptive data about our cohort, as well as information about their experiences with differentiated discrimination, including markers of anxiety and depression among those surveyed. Venezuelans included in this study arrived in Peru between 2017 and 2019, with the majority (78%) doing so in 2018. Participants' age ranged between 19 and 64, with an average age of 37. More than half of the sample was married (64%) and 30% were single. These characteristics are consistent with the data collected during the same period by the International Organization for Migration's (IOM) displacement tracking matrix (IOM, 2020). However, recent studies show that Venezuelans entering Peru are now younger, ranging in age from 18 to 35 (IOM, 2021). Moreover, our sample shows that 78% have at least one child and 81% have at least one child in Peru.

Our cohort is highly educated, with 65% either having been enrolled in a university or having completed a university degree, and 15% having finished technical education at the time of our encounter. The aforementioned characteristics are consistent with previous studies (INEI, 2019a). Prior to migrating, participants were employed in sales, health, and the education sector. Comparatively, in Peru, participants are mainly employed in the services and sales sectors, mostly working informally (Sánchez et al., 2020).

We also found that Venezuelans experienced varying degrees of discrimination and exploitation in their socio-labor integration process in Peru. Indeed, 71% of our cohort reported nationality-based discrimination. As shown by Freier and Pérez (2021, p. 120), the experience of discrimination also varied according to participants' age. Relatedly, our survey showed that younger participants, specifically those under 35 years of age, were more exposed to discrimination in comparison to their older counterparts (78 vs. 63% respectively).

Discrimination, while a key experience for both genders, is a gendered experience: More women (77%)

reported being discriminated against in comparison to men (61%). Additionally, gender-based discrimination was mentioned by 16% of women (Table 1). Women's discrimination is expressed as hyper-sexualization and sexual harassment (Freier & Pérez, 2021; Pérez & Ugarte, 2021). Moreover, women are also discriminated against in relation to their age (Pérez & Freier, 2021).

Finally, our data show that both men and women have experienced anxiety and depression throughout their integration in Peru, although the markers are higher for women regarding depression (Bird et al., 2020).

In summary, Venezuelans in Peru constitute a highly educated, yet vulnerable group. As "migrants of despair," their socio-labor integration experiences are deeply shaped by the country's high levels of informality (70% to be exact; see INEI, 2019a; Koechlin et al., 2019), social inequality, and discrimination based on ethnicity, geography, and gender markers (Beltrán et al., 2021; Díaz et al., 2021; Galarza, 2012; INEI, 2019b; Manky, 2021).

5.2. Interviews and Focus Groups

Freier and Pérez (2021) show how immigrants' discrimination experiences vary depending on whether it occurs in public spaces or the workplace. We found that Venezuelan men and women experience discrimination in public spaces and on their jobs, though, for both, instances of discrimination in the workplace are more frequently reported (Table 2).

The subject of criminalization arose during the interviews and focus groups as the main aspect of nationality-based discrimination. According to the qualitative data, 33% of women and 43% of men shared experiences of being criminalized for being Venezuelan. Interestingly, most of the participants that shared experiences of discrimination and criminalization in the workspace are employed in the service, sales, and health sectors. Table 3 presents the main types of discrimination identified in the interviews and focus groups.

6. Discussion

This section responds to the two questions posed at the outset of this article: How do Venezuelan migrants in Peru approach their criminalization? What are the socioeconomic and political conditions that have hastened migrants' responses?

6.1. Active Opposition to Criminalization

Venezuelans in Peru have been discriminated against and rejected in different spaces, both in public and in the workplace, and criminalized based on xenophobic characterizations as unsavory, thieves, prostitutes, and/or murderers (Freier & Pérez, 2021; Pérez & Freier, 2021). Venezuelans respond to this criminalization in different ways, two of which we discuss here. First, they may choose to disregard and simply not engage with the discrimination in their daily lives, actively focusing on work and getting ahead. Second, we find specific instances whereby immigrants employ satirical and ironical postures. An overriding attitude is that Peruvians reject them out of their own ignorance. We argue that both the mindful decision to flout the rejections, as well as the use of humor as a shield, serve as coping tools.

6.1.1. No Time to Engage

During the focus group session in Lima and chiming in on the discussion of how different compatriots experience,

Table 1. Type of discrimination experienced by gender (quantitative data).

	Nationality-based Xenophobia	Discrimination by gender	Discrimination by age
Women	77%	16%	4%
Men	61%	2%	0%

Source: Freier and Pérez (2021).

Table 2. Spaces of discrimination by gender (qualitative data).

	Workplace	Public spaces	Other
Women	57%	33%	10%
Men	60%	31%	9%

Source: Freier and Pérez (2021).

Table 3. Type of discrimination by gender (qualitative data).

	By nationality	Criminalization	By race	By gender	Sexualization
Women (interviews)	85%	33%	3%	39%	32%
Men (focus groups)	60%	43%	9%	0%	0%

and make sense of, discrimination, one man mentioned: "We arrive here to get ahead; we don't come to stagnate, to say Peruvians do such and such to me." His advice to the other men—his particular approach to moving forward—was to remember that the only reason for being in Peru was to seek work and a steady income for themselves and their family members back home.

Likewise, one woman interviewed in Lima made the following comment:

> If they knew that, while they are saying "if she does this, or doesn't do it," I occupy my mind in my free time…if they could understand that I don't care….I only care about doing my work and that I have not come here to take away anyone's work….I don't have the time, truthfully, to think about that.

Finally, and in direct response to instances of gendered discrimination, another woman interviewed in Lima shared her posture relative to the hyper-sexualization and criminalization of her female compatriots:

> I stay silent. [They say] that Venezuelans take away husbands, that Venezuelans are prostitutes, that Venezuelans come to sell their bodies. I am Venezuelan, but I have neither prostituted myself nor have I come to sell my body. So, why am I going to defend myself? Why am I going to defend someone that, first, I do not know, and, second, I do not know the situation they are going through? It may…be [true] that their husbands left them for Venezuelans. So, I'd rather keep quiet. I think I get further [ahead] by staying quiet than by engaging in a situation that doesn't make any sense in the long run….Spoiling your day, it's not worth it.

In the three cases shared, we find that Venezuelan men and women's decision to disregard discriminatory and criminalizing remarks constitutes a vital coping mechanism, as their main objective—as "migrants of despair"—is to work and get ahead. The first and second comments emphasize the unwillingness to entertain such denunciations; one must focus on surviving and sending remittances back home. The third comment, in response to the devaluation and criminalization of Venezuelan women, steers clear of the accusation, disengaging and proceeding unobtrusively.

6.1.2. The Joke's on You!

Conversations with Venezuelans also provide evidence of how they ridicule their detractors, particularly through satirical and ironical postures, in a context in which the political tide has turned against them.

During the focus group session in Tacna, we discussed a gruesome murder that was highly sensationalized in the Peruvian press, whereby a Venezuelan and two Peruvians quartered their victims. To illustrate how such incidents are hyperbolized, one of the focus group participants shared an anecdote about a conversation on the matter with his landlord and the latter's exchanges with other Venezuelan tenants. In his account, the landlord accused Venezuelans of being "vicious murderers." Our focus group participant shared how another Venezuelan tenant brought up—as in rebuttal to the landlord's accusation—that a Peruvian man had recently murdered his wife, chopped up her corpse, and ate it. The landlord relativized the national example, saying it was an unimportant aberration, unrepresentative of Peruvians. Commenting on his response to the landlord's position, the focus group participant shared the following dialogue:

> But Mr. Claudio [the landlord]—How can you talk like that, Mr. Claudio? You know, it's still death, we are talking about killing people….How can you be so cold-blooded to kill, cut her up, cut—to cut, you grab a steak…you eat it. [The landlord replies:] No…but those are crazy people from Puno, the jungle, those crazy people. But you…you come from far away to kill people here [the group laughs]. Then I said, "Mr. Claudio, good night." My wife wanted to get into it with him and I said, "let's go because these people….What can one discuss here? One cannot discuss."

In the focus group session in Cusco, a slender male beautician also referred to the quartering incident and provided an even more directly satirical response to his criminalization. He said:

> Look, not long ago, I had an experience….I had another place…and the landlady threw me out because, she said, "you know what? You are a *descuartizador* [ripper]" What?? Look at me!! [The group laughs] Look at me, look at how they mock, they see me as a faggot, whatever, but a *descuartizador*…me?? Please!!

The above-noted interactions reveal a few points about the use of satire by displaced Venezuelans. The example used to rebut the landlord's claims of Venezuelan criminality was intended to expose Peruvian ignorance and savagery. The manner in which the participant told the story suggested that he and his compatriots used the barbarous case of the man who ate his wife as a way to scorn their landlord. The explosion of laughter and the ridicule of this scene by the men in the focus group, particularly in response to the landlord's phrase "You…you come from far away to kill people here," which displayed a posture of moral high ground, revealed the irony in the landlord's comments as he could not admit the atrocity of the crime described, and even "otherized" fellow Peruvians. Likewise for the beautician, his self-mockery sought to underscore his landlady's histrionics, thus casting Peruvians as both preposterous and ignorant for

criminalizing Venezuelans. With these reactions, participants seem to be saying ironically, "the joke's on whom?"

In summary, we find that Venezuelans cope with their criminalization by forging ahead and ignoring the negativity through work and stamina, on the one hand, while also ridiculing and/or satirizing their detractors through humor and/or irony, on the other.

6.2. Intra-Group Boundary-Making and "Othering"

Focus groups and interviews also reveal that Venezuelans create boundaries among themselves as a national group. In this section, we address two forms of intra-group distinction. First, interviews revealed how differences are established between "good" immigrants—non-criminal, educated, and worthy—and those who are not. Second, participants' testimonies revealed an expressed fear of the "other."

6.2.1. Us vs. Them

Overall, the results from the interviews and focus groups depict how Venezuelans differentiated themselves from their compatriots based on perceptions of criminality, which were assessed regarding linguistic style, educational level, work ethic, and choice of employment. During the focus group session in Cusco, a man poignantly discussed distinction-making practices between those who are considered criminal and those who are not:

> I don't know whether it is a cultural question, but we have learned to have intuition—We look at one another, we listen a little to how [they] speak and we say, "this is a *tuki* [delinquent] or this *bug* [this thing, this guy] is a *choro* [delinquent]."

Similarly, one lady interviewed in Trujillo observed:

> Unfortunately, there are those compatriots who have come here to commit a crime; they have come to try and sully our true name. We are working people, educated people.

Another woman in Tacna told us:

> Yes, it also happens that many young women…like to live the easy life, and then they think that, because one leaves the country, one comes here to do the same. So, it is like they globalize [generalize] everything, all that, and they think that we are all like that.

Interestingly, the three cases shared distinguish between law-abiding, hard-working people and those who fall outside of that particular bracket. In the first comment, the honest Venezuelan is pitted against the criminal counterpart—a distinction that is mostly assessed via people's linguistic style. The second testimony reaffirms the decency of some Venezuelans, as opposed to their delinquent compatriots, via claims centered on education level and work ethic. The last comment makes a criminalizing inference to prostitution—an activity of which Venezuelan women in Peru have been repeatedly accused (Pérez & Freier, 2021; Pérez & Ugarte, 2021). As in the other cases, this posture marks the "decent" from the "improper."

Participants also commented on their compatriots' incivility, vulgarity, and/or ignorance, further contributing to their construction as "others." During the focus group session in Tacna, a gentleman observed:

> There are people who suddenly come from Venezuela….I don't know if it's because of their youth…the lack of education, what happened in Venezuela….You see a guy talking and you say, "this guy is lost." How are you going to say here that they [Peruvians] are a cave [pack of] of *indios* [indigenous people]?

Likewise, in an interview with a woman in Lima, she revealed:

> You get on a bus and hear two young Venezuelan women talking and sometimes even I feel embarrassed for them. Because, first, they speak very tough; second, they use dirty language…that the Peruvian is not accustomed to. For example, for us to say *arrecho* or *arrechero* means that you're upset. For them [Peruvians], it has a more sexual meaning [horny]. So, then, if you know that the term is offensive, don't say it. Or if you're going to say it, say it more discreetly.

In both cases, we see a class-based distinction in terms of linguistic styles and manners, asserting that some Venezuelans create image problems for those who are trying to integrate successfully. Moreover, we find a vindication of the host society as one that should be respected.

6.2.2. The Frightening "Other"

Beyond creating boundaries among compatriots, we have found evidence that intra-group distinctions may be based on different manifestations of fear. For example, in an interview with a woman in Tacna, the participant noted instances of competition and confrontation with other Venezuelans living in Peru:

> Even your own people, because sometimes you come to find that your worst enemy here, once you emigrate, is a Venezuelan….There is confrontation when you are selling something: "You cannot share the space with me."

In contrast to the distinctions made among Venezuelans about those who are "good" immigrants, and those who

are not, the aforementioned quote conveys not only differentiation but a sense of rivalry as well, suggesting a fear of the "other" as an impediment to carving out a proper space to work.

Relatedly, an interviewed woman in Cusco also expressed fear of the political baggage that is brought to Peru by former soldiers and/or government sympathizers on the run from their past deeds. More specifically, she told us:

> Some had committed common crimes, homicide, kidnapping, robbery; others had been fleeing…human rights crimes, that is, they had repressed protests, and so on. And they had lost the support of their superiors….So, they are fleeing from Venezuela, from all these crimes that had occurred.

This woman's testimony suggests a fear of political tensions and/or retributions among Venezuelans in a context in which both supporters and dissenters of the Maduro regime have fled the country, and are living among each other in Peru in precarious circumstances.

6.3. Triggers for Intra-Group Boundary-Making

As the broader literature on this subject showcases, migrants create intra-group boundaries as the processes and experiences of immigration change over time: the composition of incoming groups becomes more heterogeneous, and second-generation migrants integrate into host societies (Petintseva, 2015; Schiff, 2021). However, our findings suggest that Venezuelan migrants in Peru began to differentiate among themselves around mid-2019. More specifically, boundary-making practices occurred within the same generation and between migrants who arrived in similar time frames. This also coincided with the Peruvian state's shift toward increased securitization, including, among other things, a cessation of the automatic issuance of temporary resident status (*permiso temporal de permanencia*) to Venezuelans in June 2019. Instead, Venezuelans required passports for entry into the country. Obtaining the latter was nearly impossible to achieve, considering the state of Venezuela's bureaucracy, as well as the requisite time and resources that obtaining a valid passport would imply. Thus, we found a growing group of migrants with irregular migratory status and who have become more vulnerable (poorer, less educated) over time (Freier et al., 2019). In addition, during this period, media sensationalism flourished in Peru, with statements from public officials, including then-President Martin Vizcarra, which helped to create a spectacle of Venezuelan criminality (Freier & Castillo Jara, 2020).

This public and media sensationalism around Venezuelan criminality has occurred against the backdrop of a 70% labor informality rate—one of the highest in the region—as well as poor access to, and quality of, public services (Beltrán et al., 2021; Cueto, 2021; Guadalupe, 2021; Yamada & Montero, 2020). As we have noted, Venezuelans have largely flowed to work in the informal sector in a context in which they compete for work with both Peruvians and fellow compatriots. On the one hand, they might satirize Peruvians who discriminate against them, while distinguishing themselves from their compatriots who represent economic competition and/or who may further erode their already precarious positions, on the other.

In her description of newly heightened experiences of discrimination and competition for jobs, one woman interviewed in Cusco commented:

> Since when I arrived [it is]…the first time…that I have been unemployed for so long…not even when I first arrived. Because when I first arrived…it was not difficult for me to get a job, even up to three jobs! Imagine! I had two jobs….Not right now…and I feel that it is for the same…thing…because…in every country there are bad people…so I feel [about the things other Venezuelans have done in Lima], the bad things…that kind of spreads, you know?

Another woman interviewed in Lima expressed her fear about Venezuelans' socioeconomic and political vulnerability. Here, she underscored her active opposition to being criminalized and differentiated herself from other Venezuelans:

> I avoid…being in groups where many Venezuelans are acting up….Here, for example, you cannot afford an illness, right? Ok, if you got sick, fine, but you can't go around looking to get attacked on the street for something silly, for something you could have avoided. Here, if you get sick, they throw you out and you lose your job. So you can't afford a lot of things. So, it's better…to stay out of a lot of situations.

By mid-2019, Peru experienced its own political crisis due to corruption scandals and persistent inequality, which led to the country's about-face on work permit policies and increasing media sensationalism surrounding Venezuelan displacement. As a result, the country's initial welcoming stance toward Venezuelan migrants shifted to increased securitization measures, which, as the prior pages suggest, intensified this group's marginalization and scapegoating. This context may explain why Venezuelans who arrived before the aforementioned policy change used satire and intra-group boundary-making as coping mechanisms to counter their criminalization, specifically differentiating themselves from later-arriving compatriots.

7. Conclusion

In the context of Venezuela's economic, humanitarian, and political crisis, and complicated by Peru's sociopolitical insecurity, securitization policies, growing migrant

vulnerability, and documented criminalization (Freier & Pérez, 2021; Pérez & Freier, 2021), we find that Venezuelans confront this situation using both satire and intra-group boundary-making. Overall, we have argued that displaced Venezuelans' use of these coping mechanisms has intensified alongside increasing criminalization in the media and socio-political discourses, as well as more precarious levels of socio-economic integration. In this regard, we have documented how Venezuelans underscore their value while differentiating themselves from later-arriving compatriots.

This case study contributes to the literature on migrants' responses to criminalization and intra-group relations in the Global South, which constitutes an understudied phenomenon. The information gathered on specific coping mechanisms, as well as on the sociopolitical context that has hastened these responses, may inform social policy interventions that seek to address xenophobia while exposing the state's generalized negligence on social protections. At the same time, our research raises questions about the complexity and ramifications of existing social-racial hierarchies in the host country, as well as of migrants' own race and class conceptualizations, in a context of south-south migration. Looking ahead, future research on south-south migration might consider how immigrants' integration and/or adaptation strategies serve to change, maintain or enhance host societies' existing social inequalities.

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