

# Chapter 1

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



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

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

### 1.1 Introduction

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

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

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

## 1.2 The INCASI Project

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

#### ***1.3.1 Social Inequalities from a Comparative Perspective***

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

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

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

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

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

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

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

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

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

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

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

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

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

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

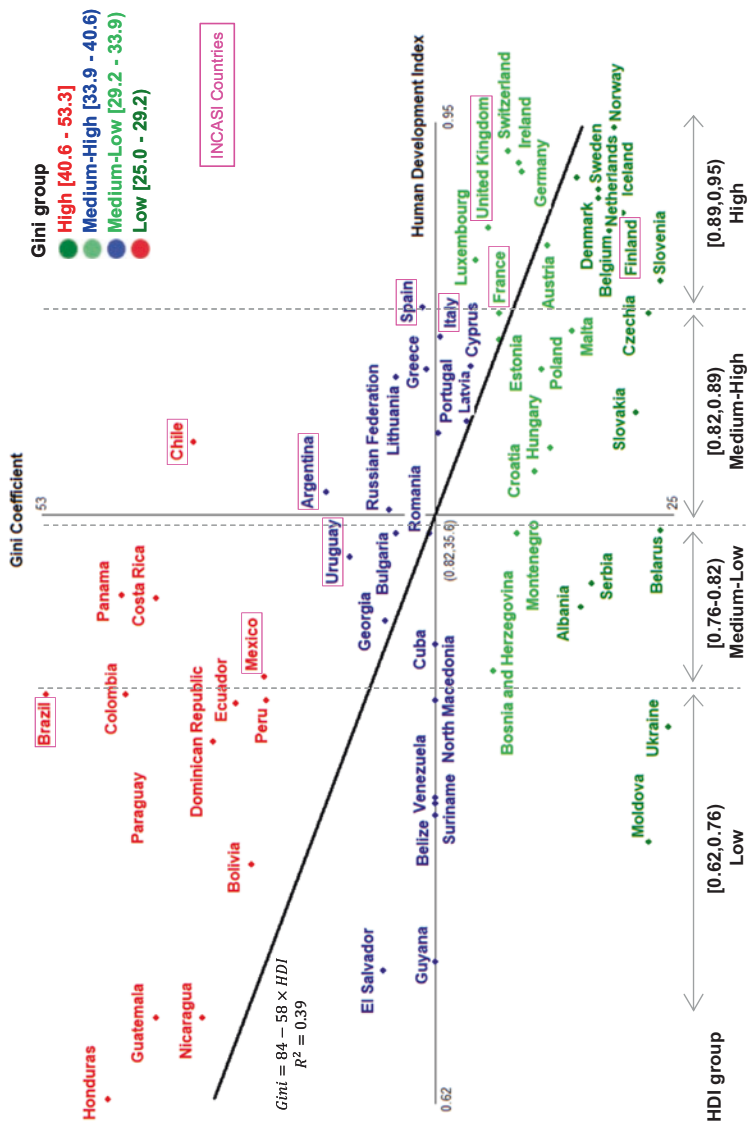
To conclude this section, we should highlight that our analysis of the different dimensions of social inequality from a comparative perspective repeatedly verifies the unequal positions between the different Latin American and European countries. Using multiple indicators in different areas (economic,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



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

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

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



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

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

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

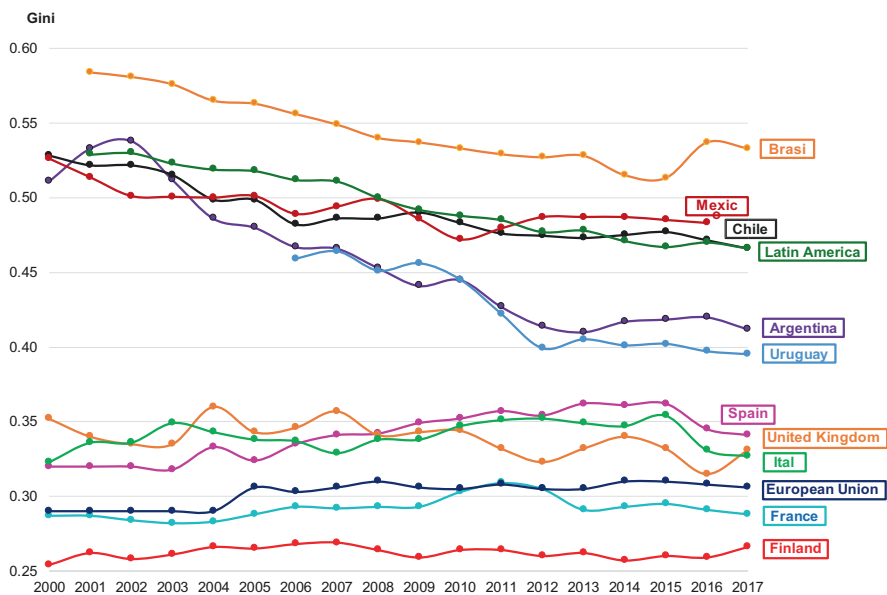


Fig. 1.2 Evolution of economic inequality in Europe and Latin America 2000–2017. Source: Authors, based on World Bank, OECD & Eurostat

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

### ***1.3.2 Analytical Model on Social Inequalities and Trajectories (AMOSIT)***

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

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

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

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

#### **1.3.2.1 Inequalities in the Labour Market and Labour Trajectories**

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

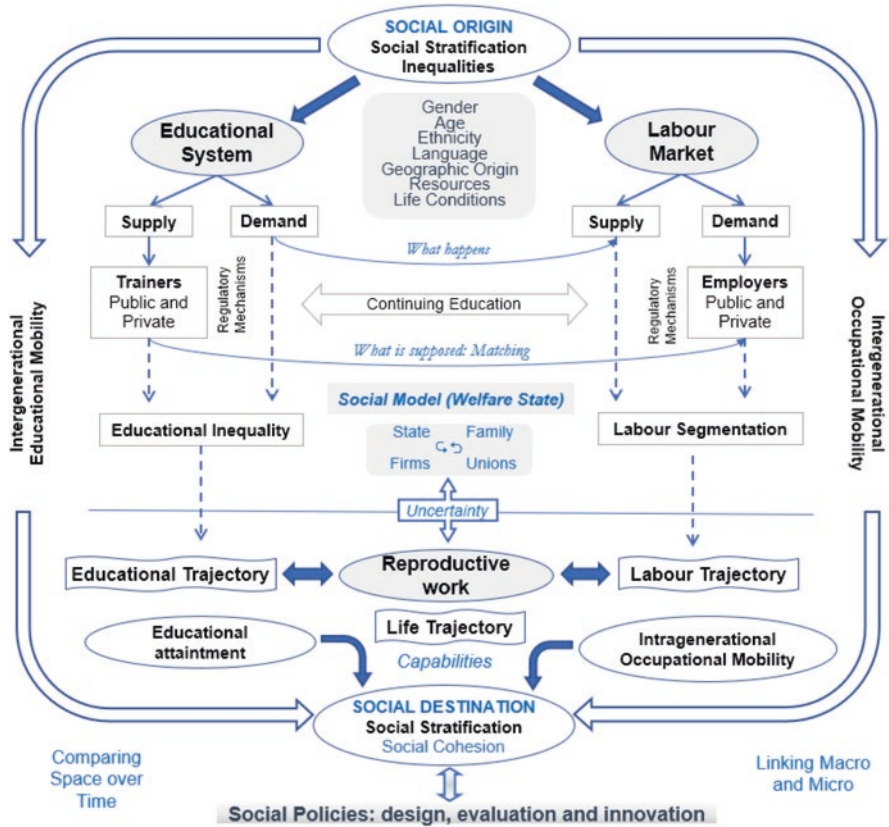


Fig. 1.3 Analytical model on social inequalities and trajectories (AMOSIT)

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

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

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

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

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

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

### 1.3.2.2 Educational Inequalities

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

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

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

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

### **1.3.2.3 Asymmetries in the Relationship Between Training and Employment**

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

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

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

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

#### 1.3.2.4 Inequalities in Work and Family Life

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

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

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



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

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

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

### 1.3.2.5 Social Inequalities, Migration and Space

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

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

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

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

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

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

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

### 1.3.2.6 Uncertainty, Strategies, Resources and Capabilities

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

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

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

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

### 1.3.2.7 Inequality of Opportunity: Intergenerational Social Mobility

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

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

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

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

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

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

### 1.3.2.8 Linking the Thematic Lines of Research

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

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

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

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

We therefore sustain that:

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

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

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

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

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

## 1.4 Structure and Contents of the Book

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

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

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

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

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

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

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

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

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

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

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



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