



Reassembling Social Security: A Survey of Pensions and Health Care Reforms in Latin America Published in association with the Pan-American Health Organization

By Carmelo Mesa-Lago

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The reform of social security pensions and healthcare is a key issue for the modern world, and in many ways Latin America has acted as a social laboratory for the reform of these systems. From the reforms that took place in Chile in 1981, most pension and health care systems in the region have seen reform, and been fully or partially privatized. Many other countries considering reform of their own systems have been influenced by the policies implemented in Latin America.

Yet despite the importance and influence of these reforms, until now there has not been an integrated and comprehensive analysis of the changes and their effects. This book is the result of four years of painstaking work, data collection, field research and international collaboration, and so fills the vacuum in the literature with a systematic comparison of pension and healthcare reforms in the 20 Latin American countries.

It identifies reform models, and elaborates taxonomies to facilitate their understanding and comparison. Some key features of the reforms to emerge are: labour force and population coverage, equity and solidarity, sufficiency and quality of benefits, state regulation, competition and degree of privatization, efficiency and administrative costs, social participation in management, financing sources and long-term sustainability. Effects of the reforms on social security principles are measured based on recent standardized statistics and other information. Goals or assumptions of the reforms are contrasted with actual outcomes, and the pros and cons of private versus private provision assessed. Detailed policy recommendations are offered to correct current problems and improve pension and healthcare systems.

This is the first book to comprehensively study these influential reforms in Latin America's pension and health care systems, and as such will be of importance to

academics and researchers interested in social security and welfare policy, pensions, health care, and public policy; Social security, pension, and health care policy-makers; And social security, pension, and health care consultants and practitioners.

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Editorial Review

Review

"Mesa-Lago offers a magisterial survey of reforms in pensions and health care since the 1990s that covers most countries in the region. *Is* encyclopedic, an invaluable source of information on specific programs, country by country and on the positions and roles of the various international organizations. An important contribution is the clear and detailed discussion of concepts, definitions, and data in the many dimensions of pension and health systems." (Joan M. Nelson, Woodrow Wilson Center, *Latin American Research Review*, 2011).

"This book is the quintessence of Mesa-Lago's research over 40 years on social security in Latin America, combining a systematic study of concepts and principles with the solution to existing inequalities in access and protection. He convincingly succeeds in making comparable and understanding the various systems despite their complexity, all the lessons and challenges, for the benefit of a wide circle of readers interested in sociopolitical issues" (Eva María Hohnerlein, *Zeitschrift für ausländisches und internationales Arbeits-Sozialrecht*, 2009).

"If you study or are interested in Latin American social security, this book must be in your library... it is monumental, comprehensive, rigorous, detailed and complete thus making it of unavoidable consultation and discussion" (Juliana Martínez Franzoni, *Revista Centroamericana de Ciencias Sociales*, 2009).

"A meticulous and comprehensive analysis of the pensions and health-care reforms in Latin America, which combines a detailed study of countries and the elaboration of taxonomies that contribute to the conceptualization and understanding of said reforms within a global framework... a monumental effort that illuminates the specificities and prevents against the risk of easy simplification in the evaluation of the nature and effects of the reforms (Silvana Harriett, *Cuadernos del CLAEH*, 2009).

"A comprehensive review of recent pension and health-care reforms that covers most countries in the region....encyclopedic...an authoritative and tremendously valuable book."--*Latin American Research Review*

"This book is an outstanding achievement. Few could have written a book on welfare reform in Latin America with the depth of knowledge, acute understanding, and easy accessibility that Mesa Lago is able to use to illuminate on this subject. Our understanding of welfare reforms in the region is in large part due to his work. A wonderful bequest for those researching this area."--Armando Barrientos, Brooks World Poverty Institute at the University of Manchester

"This is a unique and updated piece of academic work with a policy oriented approach to Latin American social security issues. Because pensions and health care dominate most of Latin American social policy agenda but also have extremely relevant economic and fiscal consequences, this book is a must for everyone

interested in a comprehensive view of this heterogeneous region. Therefore, the book is a valuable resource for experts on pensions, health care, social security, and Latin America."--Fabio M. Bertranou, Senior Social Security Specialist, International Labour Organization (ILO), Santiago, Chile

"Without a doubt, Dr. Mesa-Lago's study is the most comprehensive, critical and accurate account of the evolution of social security systems--including an impact evaluation of recent reforms--in the 20 Latin American countries. A must read for policy-makers and scholars interested in social security systems."--Núria Homedes, Director of Global Health, University of Texas-Houston, School of Public Health, and Antonio Ugalde, Professor Emeritus, University of Texas-Austin, Department of Sociology

"This book is an elegant and well-researched tour-de-force of Latin American pension and health reforms and their impacts. Drawing on five decades of work on social security systems in Latin America, Carmelo Mesa-Lago bridges the gap between pensions and health care through a cross-cutting analysis of vexing policy issues. This book will become an invaluable asset for all those grappling with the complexities of social policies in Latin America."--Gerard M. La Forgia, Lead Health Specialist, World Bank

"Carmelo Mesa-Lago is one of the masters on economics of Social Security in Latin America. In the last three decades, his ideas, books and accurate papers had influenced many generations of social economists and policy makers in every country of the Region. This book is a new masterpiece that will contribute to update the knowledge about the achievements and challenges of the last generation of reforms on social security in Latin America."--André Medici, Senior Social Development Specialist, Inter American Development Bank

"A treasure trove that marries an analytical approach with deep, wide-ranging and long-standing understanding of country experiences. A must have for anyone interested in the tortuous path of social security reforms in Latin America and an up-to-date assessment of their outcomes."--Nicholas Barr, Professor of Public Economics, London School of Economics and Political Science

"This comprehensive volume is written by the most knowledgeable expert on Latin American pension and health care issues, a long-standing observer of social policy making in the subcontinent. His razor-sharp analysis and recommendations deserve many readers in Latin America and beyond."--Katharina Müller, Professor of Social Policy, Mannheim University of Applied Sciences

"This outstanding book presents a complete and systematic comparison of pension and healthcare reforms in all twenty countries of Latin America...the issues are addressed in a scholarly fashion and supported with solid data, balancing the positive and negative aspects of the reforms and identifying advantages and disadvantages of public and private systems to correct flaws of both and improve all types of systems and reforms."--*International Social Security Review*

"This book is particularly important at a time of...international financial meltdown.... an indispensable tool for understanding the basic and highly complex issues of welfare reform."--Hedva Sarfati, Former Director Dept. of Industrial Relations ILO, *International Labour Review*

"This book is a tour de force by the maestro of social security systems in Latin America...an invaluable source for students in the region.... The book's comprehensiveness and excellent organization makes it of great value for policymakers and researchers in the region and other parts of the world who are considering reforming their pension and health systems."--Juan Yermo, OECD, *Journal of Pension Economics & Finance*

"This compendious volume by Latin America's most respected social security scholar... is undoubtedly the definitive account of the marketization of pensions and health care in Latin America. It should be consulted not only by Latin American social security scholars but by anyone interested in issues of social policy, privatization and welfare."--James Midgley, University of California Berkeley, *Journal of Sociology and Social Welfare*

"A comprehensive and masterly account of pension and health reforms, reflecting the attributes one has come to expect from the author's work: depth of knowledge, acute understanding, and easy accessibility. The book has a claim to be the definitive study on social security reforms in the region."--*Journal of Latin American Studies*

"This book presents the results of Mesa-Lago's studies over a 50-year period of social policy in the 20 countries in Latin America... Detailed and strict selection of data supports his voluminous analysis on social security pensions and healthcare reforms in the region...that surpasses all his previous works.... He goes further in providing a comprehensive, comparative and substantive academic evaluation of [such] reforms...with the same theoretical framework.... His book, the fruit of his many years of observation and analysis of social policy reforms, will be of crucial importance not only for Latin America, but also for many other governments that have introduced structural reforms in recent years, as well as for Japan."--*Journal of Developing Economies*

"The very successful career of Carmelo Mesa-Lago has been always characterized by the thoroughness of his arguments and the enormous richness of the empirical evidence he uses to support them. His latest book is the culmination of that scientific effort centered in promoting more effective and equitable social policies. It offers a demolishing criticism of the [structural] reforms but never falls into simplistic or superficial arguments, presenting instead numerous facets that enrich our understanding of such processes. [The recommendations] demonstrate Mesa-Lago's virtual encyclopedic knowledge on Latin American social security systems.... a monumental work that excels for its wealth of information, rigor of the proposals, and the very interesting and ambitious research agenda that leaves us for the future."--*América Latina Hoy*

"Mesa-Lago is an example of a university professor whose vast research has resulted in practical implementation, effectively contributed to the development of several disciplines, [and] significantly advanced the social sciences particularly economics through his valuable studies on poverty and social security. His works have no epitome.... Although there is an important literature on the theme of his book, published by international and regional organizations, we needed a comprehensive and comparative study of pension and health care reforms in all Latin American countries. This book fills that vacuum [and] we are sure that it will stimulate the debate, improve the understanding of the reforms and, above all, lead to better pensions and health care in Latin America."--Luis Aparicio Valdés, Director, *Análisis Laboral*

"Thirty years ago Carmelo Mesa-Lago published his book *Social Security in Latin America: Pressure Groups, Stratification and Inequality*, fruit of a monumental research effort that open a field virtually absent in the disciplines of economics, sociology and political science in Latin America... After that pioneering work and a remarkable academic life he gives us another book of colossal dimension *Reassembling Social Security: A Survey of Pension and Health Care Reforms in Latin America*, devoted to the evaluation of diverse social security reforms in the region, especially in the last decade."--*Nueva Sociedad*

About the Author

Carmelo Mesa-Lago is Distinguished Service Professor Emeritus of Economics and Latin American Studies at the University of Pittsburgh and has been a visiting professor, researcher or lecturer in 40 countries. He is the author of 82 books and 275 articles/chapters published in seven languages in 34 countries; his most recent is *Reassembling Social Security: A Survey of Pension and Healthcare Reforms in Latin America* (Oxford University Press, 2008). Mesa-Lago has worked in all Latin American countries and several in the Caribbean, as well as in Germany, Egypt, Ghana, Philippines and Thailand, as a regional advisor for ECLAC, a consultant with the ILO, the International Social Security Association, PAHO, UNRISD, UNDP, and other U.N. branches, as well as most international financial organizations (World Bank, Inter-American Development Bank), and national and foreign foundations. A former President of the Latin American Studies Association, he has been awarded: the inaugural ILO International Prize on Decent Work (shared with Nelson Mandela), the Alexander Von Humboldt Stiftung Senior Prize and collaborative research grants, two Fulbright Senior Awards, Arthur Whitaker and Hoover Institution Prizes, University of Pittsburgh Senior Research Prize, Annual Recognition from the Association for the Study of the Cuban Economy, homage from OISS and CISS (for life work on social security), homage from the Institute of Cuban Studies and journal *Encuentro* (for life work on Cuba), and finalist in Spain's Prince of Asturias Prize on Social Sciences. He is a Member of the National Academy of Social Insurance and of editorial boards of seven academic journals, and has received grants from the Ford, Heinz, Kellogg, Mellon, Reynolds, Rockefeller, Tinker and Inter-American Foundations, SSRC, NSF, Friedrich-Ebert Stiftung, Japan Foundation and US-Spain Commission for Academic Exchange. *Choice* have selected several of his books as "outstanding."

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