

Policy Legacies, Sociopolitical Coalitions, and the Limits of the Right Turn in Latin America: The Argentine Case in Comparative Perspective

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ABSTRACT

After more than a decade of leftist governments in Latin America, the left turn began to reverse course, giving way to the rise of rightist political forces. Even moderate right-wing governments undertook reforms to reduce public spending. This agenda, however, encountered important obstacles. Focusing on the 2017 Argentine pension reform and based on extensive qualitative research, including in-depth interviews with key players, the findings here uphold previous work on the strength of policy legacies in opposition to promarket reforms. This study contributes to the existing theory by showing that protests against retrenchment favor the formation of opposition coalitions only in places where left-leaning governments had established inroads with organized popular sectors, maintaining relationships of coordination and collaboration. In these cases, the cost of specific reforms can jeopardize the broader project of retrenchment.

Keywords: Policy change, right turn, popular sectors, social coalitions, pensions, Latin America, Argentina

In 2015, after more than a decade of dominating the political scene, the left turn in Latin America began to reverse its course. Right-wing parties came to power. Some were moderate and pragmatic (Argentina, Chile, Uruguay); others were radical and entrenched in discourse of cultural backlash (Brazil); and still others emerged as conservative turns within progressive forces (Ecuador). The programmatic orientation of these governments and the economic restrictions that accompanied the end of the commodity boom led to expectations of a conservative policy

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© The Authors 2022. Published by Cambridge University Press on behalf of the University of Miami. DOI 10.1017/lap.2021.53

grounded in cuts in public spending. At the same time, the discrediting of progressive forces strengthened conservative coalitions. What was the scope of these reforms emerging in the wake of the left turn? What effects did they have on the power balance between conservative and progressive coalitions?

Since Pierson's seminal work (1994), the literature on policy change has focused on the conditions under which conservative forces might reverse components of the welfare state. Scholars have shown that retrenchment is a difficult process, especially when social programs are popular and when there are organized actors with interests linked to these policies. Policy feedback creates considerable obstacles to reform strategies. In the 1990s, Latin American conservative governments used a policy of compensations (Etchemendy 2001, 2011; Murillo 2005) that sought to neutralize resistance and achieve veto players' support to form "reformist coalitions" (Etchemendy 2001). In exchange for political support, some unions achieved organizational benefits (Murillo 2001) and were able to block reforms that directly affected their bases.

During the left turn, some of these reforms were reversed. New welfare institutions (Huber and Stephens 2012) specifically targeted the informal sectors (Holland and Schneider 2017). Cash transfer programs expanded (Pribble 2013; Garay 2016). New funding programs for cooperatives and community work strengthened popular urban poverty organizations (Longa 2019). Some authors thus describe a second wave of incorporation, similar to the one that allowed industrial workers and peasants to acquire social citizenship in the mid-twentieth century (Silva and Rossi 2018).

Yet we know little about the strength of these policies' legacies: to what extent did popular movements become veto players during the conservative turn? We likewise have little empirical evidence regarding the political effects of these legacies on the balance of power between conservative and progressive coalitions. How does the mobilizing power of popular movements impact the strength of progressive forces, now in opposition? The study of reform processes during right-wing governments after the left turn provides us an occasion for closer study.

Theory would suggest that right-wing governments that came to power after the left turn would have substantial difficulty engaging in policy change. Recent work on the subject shows that by virtue of the weight of policy legacies and political opposition, conservative governments may opt not for aggressive reform agendas but rather for gradual and less visible strategies of policy drift (Niedzwiecki and Pribble 2017). Moreover, many right-wing governments came to power with narrow electoral margins. Given this, they may even deploy progressive social policies for strategic reasons (Fairfield and Garay 2017).

Nevertheless, some governments, such as that of Mauricio Macri in Argentina, succeeded in some of their reform initiatives. This article, in line with what the literature shows, argues that policy legacies and policy feedbacks have acted as powerful blocking forces for conservative reformist projects since the left turn. Retrenchment on key policies, even when carried out successfully, implies paying high political costs that erode the legitimacy of the government and strengthen the opposition. This

touches the heart of Pierson's 1994 question of how conservative governments might engage in retrenchment without losing popularity and electoral weight.

Under what conditions do the political costs of specific reforms imply a change in the balance of power between conservative governments and the opposition? This article will show that there is a relationship between the type of sociopolitical coalitions built during the left turn and the effects of protests on the balance of power between conservative and progressive alliances. Protests against retrenchment strengthen the opposition in cases in which governments had built close relationships of coordination and collaboration with social actors, which could later be reactivated during massive social mobilizations against spending cuts.

In this sense, our study contributes to recent literature (Niedzwiecki 2014; Garay 2016; Etchemendy 2019) interested in the political effects of different types of sociopolitical coalitions that support left-turn governments. Here we focus on the influence of those coalitions after the end of the cycle, in contexts of conservative retrenchment, and argue that their reactivation was grounded in three conditions: a common program, contacts between social and political leaders forged during the left turn, and grassroots identification of popular actors with the opposition party. In these cases, the success in a specific area can be a Pyrrhic victory, jeopardizing the broader reformist program in the medium term.

According to the *Cambridge Dictionary*, a Pyrrhic victory is "a victory that is not worth winning because the winner has lost so much in winning it." In this sense, a Pyrrhic victory is the unintended consequence of the action, which produces an unexpected and negative result, contrary to the initial objectives of the actors who carried out that action. Applying it to the study of policy change, we use the term to identify specific successful retrenchment actions that have the unintended consequence of jeopardizing the project of retrenchment as a whole because they lead to the strengthening of the opposition through the formation of new sociopolitical opposition coalitions.

Our findings are derived from a case study of the 2017 pension reform process, which took place during Mauricio Macri's presidency (2015–19). Macri is the founder of the center-right party Republican Proposal (PRO), which dominated the Cambiemos coalition (Vommaro 2019). The pension reform was approved in December 2017, after Cambiemos's victory in the midterm elections. It was a Pyrrhic victory; the reform aroused widespread and visible social disapproval and ended up strengthening the political opposition. The mobilization of unions and urban poor organizations created the conditions for strengthening a new sociopolitical opposition, based on the coalition that had formed during the left turn but was dismantled at the end of that cycle.

Based on extensive archival research and 25 in-depth interviews with key players—former members of the Macri administration, Cambiemos congress members, and some of the foremost leaders of unions and social movements—this study traces the process by which the government passed the pension reform bill in 2017, and in doing so, lost popularity and promoted the gathering of the sociopolitical opposition. For a comparative view, we take Ecuador as a shadow case. In that country,

in October 2019, a measure to cut fuel subsidies triggered massive mobilizations. Although this was not a reform passed by Congress, both the Argentine and Ecuadorian policy changes affected redistribution and triggered massive protests in each country.

Protests succeeded in obstructing the initiative but did not result in a strengthening of an opposing sociopolitical coalition, defined as the alliance between social actors and partisan groups. We explain this outcome as the result of the hostile relationship that the party in power during Ecuador's left turn, led by Rafael Correa, maintained with the mobilized Indigenous movements from the beginning of Correa's administration and that the protest cycle failed to overcome. We then show that opposition to reforms—even successful ones—does not lead to the consolidation of opposing political coalitions when the popular movements were not part of the coalition supporting the governments of the left turn.

The article is organized as follows. The first section describes case selection criteria and research design and discusses alternative explanations of the obstacles that the Cambiemos reformist project confronted. We then analyze the existing research and theoretical expectations about policy retrenchment and present our general argument. We trace the process of the 2017 pension reform in Argentina, giving an account of the temporal sequence and resources mobilized by the Macri administration, as well as the scope of the mobilization against it. We show how policy legacies operate as a blockage and raise overall costs: despite being approved, the law generated high costs for the Cambiemos government.

The fourth section shows how coalitional arrangements between left-leaning parties and popular actors that were constructed under previous left-turn governments may be reactivated under the right-wing backlash, leading to a readjustment of the balance of power between the ruling party and the opposition that endangers the broader retrenchment program. In Argentina, the high political cost of the reforms is connected to the reactivation of the alliance between social movements, unions, and partisan actors that was forged during the left turn. The following section tests the validity of our argument through a comparison with the case of Ecuador. The conclusion summarizes what this case teaches us about the varieties of sociopolitical coalitions built up during the left turn and what it clarifies about the limits of the right turn in Latin America.

CASE SELECTION CRITERIA AND ALTERNATIVE EXPLANATIONS

Three types of right-wing forces came to power in Latin America after the left turn. In Argentina, Chile, and more recently in Uruguay, programmatically moderate right-wing parties promoted economic austerity policies based on tax and public spending cuts. In other cases, including Brazil and Colombia, radical right-wing parties came to power by imposing themselves not only on the left but also on the mainstream right. These parties grounded their agendas in a discourse of cultural backlash and *mano dura*. In mixed cases, such as that of Ecuador, we

can observe a policy switch within the party that had guided the left turn. There, the new government broke with the movement's leader and proposed austerity policies.

This study examines the connection between the obstacles and political costs of retrenchment agendas and the policy legacies of the left turn for a moderate right-wing government (Argentina) and a mixed case (Ecuador). To identify how policy legacies shaped the scope of retrenchment projects after the left turn, we study Argentina as a main case and Ecuador as a shadow case. For both scenarios, we analyze a major reformist attempt in terms of public budget cuts. Even though their approval involved very different processes, they were both cutbacks that aroused the largest mobilizations in each country. We do not consider cases of radical right-wing forces, as seen in the case of Brazil, because in those cases the importance of cultural issues and hardline policies seems to compete with or even dominate the economic and distributive issues (Rennó 2020) that have been the focus of existing scholarship on policy legacies.

Argentina presents the case of a new center-right political coalition, *Cambiamos*, led by a new right-wing party, PRO. Macri's party was the first competitive promarket party in Argentina to win a national election in nearly a century. In 2002, a group of political leaders, business executives, and NGO activists affiliated with Macri decided to build the party to compete in local elections, an initiative seen as a first step before entering the national political arena (Morresi and Vommaro 2014). The party rose to power in 2015 as part of *Cambiamos*, an electoral alliance comprising PRO, the *Unión Cívica Radical*, the *Coalición Cívica*, and some other minor parties. The victory followed a decade of governments led by the *Frente para la Victoria*, a center-left Peronist coalition. Because the Macri administration completed the full term of its mandate, the scope of its reformist project can be studied for a complete government cycle.

In its policy legacies, Argentina offers an extreme case in terms of independent variables (Gerring 2008; Seawright and Gerring 2008): it is an unusually mobilized society, with historically strong unions (Etchemendy 2001, 2019; Levitsky 2003; Murillo 2005) and vast popular movements empowered during the left turn (Rossi 2017; Etchemendy 2019; Longa 2019).

Unlike what happened in the 1990s (Lodola 2005; Svampa and Pereyra 2003), a popular movement of the urban poor confronted Macri's government after having established close relationships with the Kirchnerist party elites and building up an identification with this Peronist faction among their base. Kirchnerist Peronism constructed a relationship with urban poor movements through various channels, including the appointment of movement leaders in the government (Longa 2019). These links were constructed alongside more entrenched relations between the Peronist Party and the trade unions. Although this relationship suffered strong tensions during Cristina Kirchner's second administration—particularly amid increased economic restrictions and centralized political power—the alliance could later be reactivated in opposition to the retrenchment carried out during the Macri administration. Given these relationships, the Argentine case allows us to test an explanatory

model based on a combination of policy legacies and the influence of the institutionalized social support of the left-turn government.

In Argentina, conditions for carrying out a promarket program were rather unfavorable. As there had not been an immediately recent economic crisis, policy advocates could not argue that austerity was a necessary measure with “no alternative” (Huber and Stephens 2000), as they had argued in the 1980s and 1990s (Murillo 2001). In his electoral campaign, Macri had put forth a discourse of continuity, or only modest change, in regard to social issues (Vommaro and Gené 2017). Furthermore, before coming to power, PRO and the Cambiemos coalition had avoided giving marked ideological signals that might draw associations to the traditional center-right. They eluded defining theirs as a reform agenda. When Macri took office, he elucidated three positions that were noncontroversial, imprecise, and hardly translatable to clear public policy. These were “zero poverty, defeat drug trafficking, and unite Argentines.” Likewise, during the first years of his administration, one of Cambiemos’s main strategies was to program the timing of retrenchment so as to avoid electoral repercussions (Freytes and Niedzwiecki 2018).

Despite the adverse conditions for a conservative agenda, the Macri administration managed to carry out some proposed economic reforms. Among those that required congressional approval, the most notable was the 2017 pension reform bill. The bill was the first major reform law that Macri sent to Congress, as well as the project with the greatest distributive impact. It also had major fiscal implications: the pension system accounts for the highest percentage of social spending in Argentina (IMF 2016), a key component of the Gordian knot of public deficit in the country.

The pension reform offers an opportunity to examine how policy legacies work because it affects broad social interests and is one of the most important distributive areas of the social state (Weyland 1996; Niedzwiecki 2014).¹ Argentina has one of the widest pension coverage systems in Latin America (Arenas de Mesa 2019). This coverage was expanded during the left turn, due to the incorporation of noncontributory pensions.² The program generated enormous pressure on social spending but received high public praise.³ The case under study was not a structural reform of the pension scheme, since it did not affect its management or financing (Niedzwiecki 2014), but rather a reform that proposed modifying the indexation formula in order to obtain fiscal savings. In this light, the case of the 2017 pension reform allows us to control for a number of alternative explanations.

First, it is worth noting that explanations grounded in the economy are insufficient to explain the political costs identified in this study. Certainly, political economic theory predicted that the shortage of economic resources after the end of the commodity boom would impose restrictions on retrenchment policies (Campello and Zucco 2016). Moreover, the financial crisis that Argentina experienced beginning in April 2018 further restricted the resources available to the conservative government. This shortage left the Macri administration without compensatory tools to undertake further retrenchment. However, economic factors are not enough to explain why, in the Argentine case, the political obstacles to conservative reforms led

to the formation or reconstruction of an opposing sociopolitical coalition that produced a change in the balance of power between government and opposition, while it did not happen in other cases, such as Ecuador.

A severe economic crisis took place after the 2017 pension reform, but before that, the Pyrrhic victory on which we focus occurred. The financial crisis that began in 2018 undoubtedly drastically weakened the Macri government, but the political factors identified in this study explain the change in power relations that began to take place before that crisis; the crisis accelerated a change that was already underway. The government's financial weakness could have led to another type of balance of power, as in the Ecuadorian case, where the social movements and the left-wing party did not form an opposition coalition. Our explanation is thus not contradictory but complementary to an economic explanation.

Second, an explanation based on the minority governments does not allow us to understand why political costs are generated even when a reform is successful. We know that when parties come to power by tight electoral margins and hold parliamentary minorities, the chances of any reformist policy attempt are quite low (Biglaiser 2016). Macri's government had a parliamentary minority. He had won the second round of the presidential elections in 2015 by a narrow margin and failed to obtain a majority both in Congress and in most of the provincial governments: he controlled only 5 of 24 governors and was far from having a quorum of his own in Congress. Nevertheless, the pension reform passed. Macri obtained the support of some Peronist governors, which proved crucial to obtain approval in the Senate. Although support weakened during the lower house vote, the law ultimately obtained a majority. However, Macri paid high costs in the process by virtue of the political effects of the popular movements' mobilization. Furthermore, this mobilization led to an empowerment of the progressive coalition because preexisting channels allowed the resumption of contacts between Peronist leaders and the organized popular sectors.

The Ecuadorian context, as a shadow case, allows us to test our explanation in a country with a historically well organized and politically influential Indigenous social movement (largely assembled in the Confederation of Indigenous Nationalities of Ecuador, CONAIE), which includes leaders who have contributed to different governments. These groups even created their own political arm, Pachakutik (Van Cott 2005; Yashar 2005), which maintained a contentious relationship with the Alianza País party and especially with its leader, Rafael Correa, who led the left turn in Ecuador.

Unlike Kirchnerist Peronism, after an initial period of participatory logic, Alianza País did not build ties with the country's major social movements (De la Torre 2013; Ramírez Gallegos 2016) or, in particular, with the Indigenous movements. On the contrary, strong tensions persisted when those groups broke with *Correísmo* very early on (Lalander and Ospina Peralta 2012). Correa's successor, Lenin Moreno, had been Correa's vice president on two occasions, and one of Correa's trusted men, Jorge Glas, was his vice presidential candidate. Shortly after taking office, Moreno confronted Correa, supported a judicial process against Glas,

and initiated a policy shift toward austerity and fiscal adjustment policies, with support from the country's main right-wing parties (Becker and Riofrancos 2018; Conaghan 2018; Ramírez Gallegos 2019).

VARIETIES OF LEFTIST SOCIOPOLITICAL COALITIONS AND POLICY CHANGE AFTER THE LEFT TURN

Policy reform is a complex political process, dependent on the mobilization of political resources to overcome barriers to change. The literature on the welfare state has shown that efforts at retrenchment of social programs encounter serious obstacles. Achieving retrenchment requires either weakening the interest groups that support these policies or finding ways to prevent them from mobilizing. Support for these programs is usually far-reaching, encompassing vast sectors of society, and is likewise intense and associated with higher rates of political mobilization (Pierson 2001). Pierson's seminal work on the subject suggests that progressive social policies generate policy feedback that creates specific obstacles to their dismantling: lock-in effects; new networks of support, including clienteles and advocacy groups around specific programs; policy learning; and information effects (Pierson 1994).

Furthermore, implementing and sustaining retrenchment is often costly in electoral terms (Pierson 2001), even if those costs are not equal for all parties or all national and historical contexts (Giger and Nelson 2011; Arndt 2013). Given the difficulties in achieving explicit retrenchment, a mismatch between new social risks and old protections often prevails (Esping-Andersen 1999). Governments can also choose indirect strategies and "underground" means of policy adjustment that are less politically costly than an outright rollback (Hacker 2004).

What happened with policy retrenchment after the end of the left turn? The opportunities for retrenchment that arose for governments promoting fiscal austerity after the end of the left turn presented specific challenges. Although the end of the commodity boom had generated accumulated macroeconomic problems, economic crises were not as visible as they had been in the late 1980s and early 1990s (Stokes 2001; Madrid 2003). Moreover, the policy legacies of the left turn and the social actors linked to them remained vital at the end of the cycle.

During the left turn, a second wave of social incorporation (of informal workers) and an expansion of social policies and public spending took place (Silva and Rossi 2018). The expansive social policies took on different characteristics in each country (Levitsky and Roberts 2011). In some, social incorporation prevailed (increased coverage of healthcare, pensions, and education), while in others, market incorporation (increased share of formal jobs, minimal wage growth, etc.) was key (Martínez Franzoni and Sánchez-Ancochea 2014). Likewise, the participation of popular movements took on various forms and strengths, which led to different types of sociopolitical coalitions in support of the left turn governments (Etchemendy 2019). In Chile and Ecuador, popular coalitions were merely electoral, while in other countries, subaltern groups organized beyond elections, in the interest arena. In Venezuela and Bolivia, governments developed strong ties with

territorial social movements; in Uruguay, the Frente Amplio consolidated its organizational links with unions. The governments of Brazil and Argentina institutionalized ties with both formal and informal workers, unions, and territorial social movements (Etchemendy 2019).

A growing literature examines the distinct relations that emerge when political parties interact with entities and associations that represent social groups in order to include them in party organizations or coalitions. With regard to social movements, it has been shown that when parties are grounded in movements, or when movements support parties without losing autonomy, beneficial effects emerge on both sides (Anria and Chambers-Ju 2019).

This study contributes to the scholarship on retrenchment and shows its range of applicability for the end of the left turn in Latin America. First, we confirm the existing theory, in this case in regard to the left turn: policy legacies and policy feedback increase the costs of reforms. But we also show that in cases where there are veto players for retrenchment but these players do not have previous links with progressive political parties, obstacles to the reform program are dispersed and fail to crystallize into a stable opposition. By contrast, when resistance is grounded among organizations of informal and formal workers empowered during the left turn and the main progressive political parties, the political costs of a specific retrenchment include the strengthening of an opposing sociopolitical coalition. Different types of coalitions condition relations not only between movements and parties in government (Anria and Cyr 2017) but also between movements and parties in the opposition.

In this sense, even when the center-right forces manage to approve specific reforms, policy change can have paradoxical results. Beyond the immediate victories in terms of retrenchment, they can be Pyrrhic, ultimately eroding the political resources of the government and strengthening those of the opposition. We argue that the political costs of Pyrrhic victories are expressed in the strengthening of the opposition through the formation of new political coalitions that bring together separate or rival groups or factions.

In line with what has already been shown by the literature (Pierson 2001; Fairfield and Garay 2017), protests by social actors mobilized against retrenchment impede obfuscation strategies. In the case of pension systems—a traditional middle-class entitlement—cutbacks are politically dangerous and can result in a decline in the government's popularity (as assessed by opinion polls and periodic measurements) and an erosion of legitimacy that affects future reforms and diminishes overall support. However, only in certain cases do the political costs lead to the strengthening of the political and social opposition. When they have seats in Congress, dispersed opposition political forces can come together to resist a retrenchment bill. Incentives to unite may be high momentarily and can open an opportunity for negotiations and understandings. Similarly, organizations that represent the popular sectors with a high capacity to mobilize that developed during the left turn, and with links to opposition political parties, can strengthen retrenchment resistance and, eventually, erode progressive sociopolitical coalitions.

Under what conditions do these two outcomes occur? First, when the previous cycle's policy legacies, particularly in regard to social spending, are difficult to reverse, due to their popularity and the presence of veto players. Second, when highly mobilized groups—for example, unions and social movements—that were empowered during the left turn and have affiliations with political parties, support the resistance. We argue that if there are previous links between the collective social actors and the left-turn party, it is feasible that those alliances can be reactivated during retrenchment conjunctures; but if those links do not exist, it is more difficult for them to form in a critical context.

As the literature has shown, the organizational strategies adopted from the outset dramatically affect the ability of coalitions to maintain support bases and to compromise over political disagreements. Such ties are not so easily built in the heat of events but involve work over time, trust, and certain linkage strategies (Anria and Cyr 2017). In this sense, when social movements are not interested in conciliation with the political parties or are “antiparty” and distrust parties' formal structures, and when the political parties themselves lack mechanisms to organize these social sectors, it is unlikely that alliances and cooperation between them will form in the face of a reform agenda. On the contrary, when political parties have more robust social anchors, with previously established bridges between parties and unions or territorial movements, rapprochement is more feasible and political articulation more viable.

For the broader project of retrenchment to be blocked, even a strong policy legacy from the previous cycle is not enough. Only when the right-turn government's popularity declines and a public questioning of retrenchment arises, on the one hand, and a new alternative represented by a sociopolitical coalition with strength in the street and in the political system appears, on the other, can the agenda of retrenchment be blocked. By contrast, when the right-turn government loses popularity and faces protests but there are no communicating means between those who oppose the retrenchment in the streets and those who have seats in Congress, the reform agenda faces fewer obstacles.

THE 2017 PENSION REFORM PROCESS IN ARGENTINA

During its first two years in office, the Macri administration moderated the reduction of expenditure by appealing to “gradualism.” This appeal sought to curb conflict with mobilized sectors, with which it established fluent communication channels through the Ministry of Social Development (Perelmiter and Marcallo 2021).⁴ Social policies remained, and some protections that had been established during the left turn even expanded, although there was policy drift in relation to the real value of social transfers (Niedzwiecki and Pribble 2017).

In the midterm elections, Cambiemos defeated a weakened and disunited opposition. Peronism was divided into different factions according to their acceptance or rejection of the leadership of former president Cristina Fernández de Kirch-

ner. In the province of Buenos Aires—where 40 percent of the electorate resides—three Peronist factions competed for votes: one had Cristina Kirchner as a senatorial candidate; another gathered Peronists critical of her leadership under Sergio Massa, Cristina Kirchner's former chief of cabinet, and had the support of part of the unions; and the third, led by Cristina Kirchner's former minister of the interior, found support among a few key urban poor social organizations. This division allowed Cambiemos to defeat the former president in the province of Buenos Aires, a moment that would mark the height of its political power. Cambiemos also won throughout the country, obtaining 41.75 percent of the vote.

The critical victory in the midterm elections gave the Macri administration new impetus to cut public spending, a project deferred during its first two years of governing (Vommaro and Gené 2017). In October 2017, Macri announced a retrenchment agenda that included the pension system reform (*La Nación* 2017a). In 2016, the IMF had suggested a reform to solve the sustainability problem of the pension system (IMF 2016, 27). However, the Cambiemos government proposed a reform that did not attempt to modify the financing or the management of the system but was projected to save 72 billion pesos in the 2018 budget, equivalent to 0.6 percent of GDP (Slipczuk 2017). The reform included two of the IMF's recommendations: a modification in the formula for indexing pensions—taking into account inflation instead of factoring in the minimum wage and the tax collection rate—and raising the age of retirement.

Given Cambiemos's parliamentary minority, an agreement with opposition governors was crucial, particularly as they had direct influence on congressional votes. Negotiations with the Peronist governors included a set of compensations—mainly cash transfers to the provinces—as part of a “fiscal consensus” (Sued 2019). In turn, Peronist governors managed to impose some modifications on the government's project. In particular, changes to the age of retirement were made a choice for taxpayers.

The discussion of the pension reform bill began in the Senate. A divided opposition allowed the administration to win over Peronist votes in Congress. Unions and the mobilized urban poor demonstrated their opposition to the bill from the beginning. While the Senate debated the bill, a protest took place at the door of Congress, bringing together various social and political organizations: union confederations, the most powerful groups representing the urban poor, and Kirchnerist activists. They united under the slogan “It is not a reform, it is contraction” (Struminger 2017). Two weeks later, when the bill was presented in the Chamber of Deputies, the street protests intensified. On the day the bill was debated, a fence was erected around the Congress, indicating a large-scale security operation that critics labeled militarization (*La Capital* 2017).

The street protest grew in size and was organized primarily by popular groups and unions; violent clashes took place between the police and the protestors (*Infobae* 2017). The images of the conflict outside the Congress stood in harsh contrast to the celebrations of electoral victory that had taken place only a month and a half before. Signs of violence called into question the law's legitimacy, and protestors raised doubts about the administration's democratic will, arguing that the reform vote was

expedited and that there was widespread repression in the streets. Congressional factions joined those who criticized the repression; the meeting of the Chamber of Deputies had to be adjourned. President Macri suggested the possibility of approving the law through a “necessity and urgency” decree (*Página 12* 2017), but even the members of the Cambiemos coalition criticized the idea and publicly forced the government to retreat (*La Nación* 2017c). The union confederations called for a 24-hour strike, and continued protests against the reform gathered approximately five hundred thousand demonstrators. The massive mobilization showed the importance of opposition in the streets, even after the Peronist electoral defeat.

Furthermore, pro-pension system consensus turned the reform into a sensitive issue among broad sectors of the middle class, many of whom were Cambiemos voters (Murillo et al. 2016). The major street protests and the debates in the media about how much the new indexation formula would diminish elderly people’s income consolidated a public opinion consensus against the reform.

The government used a strategy of obfuscation (Pierson 1994), denying the reform’s negative consequences for retirees.⁵ But the street mobilization and the debate in the media hindered their outreach. Experts’ estimates showed that the new pension scheme would mean a decrease in the income of the elderly (Abrevaya 2017), and surveys published in the newspapers indicated that 71.6 percent of respondents believed that the law was of little or no benefit to retirees (*Diagonales* 2017). Other surveys showed that 80 percent did not agree with the modification of the indexation formula and that 85 percent believed that the reform was “bad” (*Ambito Financiero* 2017).

Meanwhile, debates over the reform in the Chamber of Deputies created favorable conditions for the coordination of the various Peronist opposition blocs. For the first time, opposing factions in Congress defended a social policy linked to the left turn. The Kirchnerist group (67 deputies) formed the center of support for the previous administration’s policies. However, labor and social movement-based deputies also supported voting against the reform and influenced other representatives by publicly voicing their opposition to the bill.⁶ At the time, there were 12 labor-based deputies and 4 deputies representing the urban poor; however, a splinter Peronist group, made up of 21 deputies, joined this coalition for the pension reform vote. On December 13, as the session was interrupted by protests inside and outside Congress, representatives of the various Peronist factions, who had competed against each other in elections less than two months earlier, embraced and celebrated the political triumph together (Moreno 2017).

The second and final session lasted more than 12 hours. The agreement reached with the governors weakened when the number of expected votes in favor of the bill dropped. The Macri administration had to make further concessions to obtain the support it needed (*Perfil* 2017b). The law finally passed by a tight margin (127 deputies in favor, 117 against, and 2 abstentions). At dawn, the head of the Cambiemos deputies group refrained from giving a closing speech (Pepe 2017), and the following day he told the press that he could not “guarantee” that the new formula would be more beneficial for retirees. The law was eventually passed, but not with-

out significant modifications, a heated conflict in Congress, and massive street protests. The political costs would prove to be extremely high.

A PYRRHIC VICTORY: THE REACTIVATION OF AN OPPOSING SOCIOPOLITICAL COALITION AS A NEGATIVE OUTCOME OF A SUCCESSFUL REFORM

*My government broke in December 2017 with the pension reform. Massismo and Kirchnerismo [the two main Peronist factions] collapsed the session, took over the Plaza and threw ten tons of stones. There we all took on a defensive attitude and started to have all kinds of problems.—Mauricio Macri, interview on political TV program *Desde el llano*, TN, October 12, 2020).*

Why is the pension reform a Pyrrhic victory? Because despite being a successful reform, it had political costs that put the retrenchment agenda as a whole at risk. The literature identifies costs in terms of government popularity, which eventually lead to electoral defeats (Pierson 2001). In this case, the pension reform process weakened Macri's popularity and the public's perception of his government. After his party's triumph in the midterm elections, Macri reached the height of his power; but after the reform his favorability fell from 53 percent in October to 45 percent in December 2017 and would never again climb above 50 percent. Government favorability ratings fell from 56 percent to 46 percent. Public critics multiplied and began to include members of his own political coalition. Popular and workers' movements led the marches in the streets, but Macri also faced his first *cacerolazo*, a form of demonstration preferred by the middle and upper classes in Argentina, Cambiemos's core constituency (Vommaro 2019).

Here we identify a main unintended cost for the advocates of retrenchment; namely, the strengthening of the opposition and the consolidation of an alliance between leftist parties and the social actors associated with their policy legacies. What explains this alliance? Left-turn governments in Argentina built sociopolitical support coalitions with organized popular sectors; these groups and alliances could be reactivated in contexts of social conflict and opposition to retrenchment. At least three dimensions of the relationships that were established during the left turn made their regrouping in a context of a conservative turn plausible. First, programmatic coincidences favored common understandings beyond the concrete opposition to specific retrenchment initiatives. Second, the channels of communication between leaders of movements and unions and leaders of left-turn political groups, built both on interpersonal political work and institutional relationships during the exercise of government, remained open. Third, a good part of the bases of these movements had dual allegiances, some maintaining a political adherence to Kirchnerist Peronism, or, in the case of the unions, to Peronism in general, even when the leaders had distanced themselves in the heat of specific conflicts.⁷

To understand how these three dimensions interacted, we analyze a temporal sequence of three moments: first, the construction of the sociopolitical coalition in

support of the left turn; second, the conflict between organized popular sectors and the Kirchnerist government that led to the dismemberment of the coalition; and third, the reconstitution of the coalition during the pension reform process.

Kirchnerist Peronism promoted the inclusion of informal sectors in social citizenship and political prominence (Rossi 2017). The position was reflected in the appointment of popular movement leaders to government offices and their inclusion in electoral lists; they were also partially trusted with implementing social programs tailored to those movements (Longa 2019). Kirchnerism also brought functions at the base of the unions' power, such as collective bargaining (Etchemendy 2019), back into operation. The sociopolitical coalition between the party and formal and informal workers' movements was constituted both "from above" and "from below": in the relationship among the leaders and in grassroots support. Grassroots popular movements identified with Kirchnerist Peronism (Longa 2019), an identification that was added to the traditional connection between the union rank and file and Peronism. After the deunionization that took place during the 1980s and 1990s (Levitsky 2001), Peronism reinforced its popular anchors through links with organizations (Silva and Rossi 2018). As Anria and Cyr (2017) point out, governments that incorporate movements intensively are more likely to retain the support of those movements in critical contexts, when defection becomes attractive.

However, by the end of Cristina Fernández de Kirchner's second term, this sociopolitical coalition had weakened. Since 2013, with the formation of Sergio Massa's Frente Renovador, Peronism had splintered. In addition, a good part of the agenda of the urban poor movements, associated with the development of the popular economy, had been eliminated from the government's priorities. As a result, leaders of these groups developed increasing tensions with Cristina Kirchner and criticized her top-down way of exercising power (Longa 2019).⁸ Finally, in 2012, unions with an immense power to mobilize began to distance themselves from Kirchnerism, a result of the administration's refusal to exempt a larger portion of salaried workers from income tax.⁹ During Cristina Kirchner's second term, unions organized five general strikes, a sharp contrast to her first term, when they had not organized any (Pereira 2019).

These divisions in the Kirchnerist coalition deepened once Cambiemos came to power. At the beginning of Macri's government, the Kirchnerist legislative bloc split, and some of its members joined the ranks of the other two Peronist factions (UNA/Frente Renovador and non-Kirchnerist Peronist Party). Some urban poor social movements also withdrew their allegiance from Kirchnerism (Vommaro and Gené 2017) and established a more autonomous relationship with the government that centered on promoting their programmatic agenda and ensuring the continuity of social assistance for their base.¹⁰ In the same vein, unions negotiated specific issues with the Cambiemos government, including resources to finance health benefits, and partly ensured social peace with the Macri administration. (There were no general strikes during Macri's entire first year in office—a record for any non-Peronist government since 1983—and there was only one strike before the pension reform debate, in April 2017).

Finally, the pension reform process during the Macri administration favored the reestablishment of the alliance between social movements, unions, and Peronist leaders, allowing coordination between street mobilization and cooperation in Congress. As we saw, in the 2017 legislative elections, the different Peronist factions had competed on separate lists and maintained different parliamentary groups. However, during the reform process, the leaders of the parliamentary groups coordinated their opposition to the bill. First, they worked together in the parliamentary commissions, in which trade unions and social movement leaders both participated and gave shared testimony against the reform project (Perfil 2017a). Then, union-based and social movement-based deputies and the different Peronist parliamentary groups undertook a coordinated project in the corridors of Congress. The day of the debate, they unified their request to suspend the debate in the Chamber of Deputies, given the police repression of protests.

Members of the various groups had learned that coordination was the most efficient way to oppose the Macri government (Moreno 2017). In these instances, both union-based and social movement deputies acted as bridges between the protesters in the street and Congress. Likewise, in the street, the popular sector organizations' bases were reunited with Kirchnerist activism. The street mobilization was able to articulate itself politically because there were previous channels of communication between its leaders, programmatic affinity, and identification of its bases.¹¹

Although the pension reform was approved, it generated the conditions for the reconstitution of the sociopolitical coalition forged during the left turn. These acts of cooperation and coordination between opposing parliamentary groups that shared a common Peronist past marked the beginning of joint parliamentary work, as well as of rapprochement between movements, unions, and Kirchnerist leaders. For instance, this opposition bloc supported a bill to stop the decrease in subsidies to utility tariffs, an effort President Macri later vetoed. In the short term, this brought high costs for the Macri government, which had to postpone the other scheduled reforms (labor, tax).

The legislative victory thus bore bitter fruit for the Macri administration. According to Federico Sturzenegger, president of the Argentine Central Bank during most of the Cambiemos administration, "significant union mobilization ... cast doubt on the ability of the government to push further with other reforms" (Sturzenegger 2020). A little over a year later, a new electoral coalition formed that brought together the groups and party factions that had found themselves in opposition to the pension reform process and thereby partly reconstituted the left-turn coalition. Our argument does not seek to explain electoral outcomes, but it does seek to understand the blocking of the retrenchment program. Ultimately, the political costs of this specific reform were so high that they depleted the larger retrenchment agenda. The pension reform was a Pyrrhic victory.

THE ARGENTINE CASE IN COMPARATIVE PERSPECTIVE

To test our model, we analyze the case of Ecuador. In that country, the government of Lenin Moreno, a mixed right-turn case, also attempted an agenda to cut public spending, affecting the interests of popular sectors. Moreno was elected president in 2017. Despite being the candidate of the ruling Alianza País party, which had been founded by Rafael Correa, he fell out with Correa shortly after taking office.

Moreno reoriented both his political alliances and his policies in a probusiness direction (Conaghan 2018; Ramírez Gallegos 2019). As part of an austerity policy that reflected IMF priorities, he announced a cut in fuel subsidies. This cut generated massive protests that began in October 2019 and would become the landmark mobilization against the administration's austerity measures. Social movements, and in particular Indigenous organizations, unions (with the exception of the transport union, which negotiated with the government and abandoned the cause), students, and pro-Correa activists participated in these protests. After several days of Indigenous-led demonstrations in the streets of Quito, the government suspended the reform.

Although Indigenous activists intermingled with Correa activists in the streets, the two groups did not coordinate their actions. Conversely, the Indigenous movement leaders were careful to differentiate themselves from *Correísmo* at all times and negotiated independently with the government. After the protests, this conflictive distance between Indigenous movements and *Correísmo* persisted. Moreover, the Indigenous movement strengthened its strategy of autonomous representation through its political instrument, Pachakutik. In short, in the movement's victory against retrenchment, the government paid political costs for the failure of its initiative, but the balance of power was not modified by the formation or strengthening of an opposition coalition that would unify the social opposition and the political opposition, either in parliament or in the public space. After the mobilizations, the government was weakened, but the Indigenous movement and *Correísmo* continued acting separately.

Correa had led Ecuador as president for ten years and had prioritized an economic policy oriented to the domestic market and expanding social policies (Conaghan 2015). However, shortly after assuming his first term in office, he fell out with the Indigenous movement and with many of the social movements that had supported him initially. Differences in socioenvironmental policy and the adoption of a vertical organization of power that privileged the direct link between the leader and society (De la Torre 2013; Ramírez Gallegos 2016) explain the conflict.

Divisions took form in the three dimensions that our analysis identifies. First, programmatic differences in socioenvironmental issues produced during the beginnings of the Correa administration led to a growing distance between the government agenda and the social movements' demands. Correa's government deepened a neodevelopmentalist policy, contrary to the environmental demands of the Indigenous movement. During his presidency, Correa described CONAIE and its allies' opposition as "infantile Indianism" (cited in de la Torre 2010, 163).

Second, the conflict between Correa and the Indigenous movement interrupted the relationship between Indigenous and Alianza País elites, generating a strong antagonism between those two sectors. Moreover, after openly disputing with Indigenous groups, Correa sought to replace them (Becker 2013, 50). Third, the differences between the government and the Indigenous movement were expressed in the distancing of the Indigenous base from *Correísmo* (Ramírez Gallegos 2016). Even the Indigenous movement's grassroots were persecuted during the Correa administration. This distance had its electoral correlate in the second round of the 2021 presidential elections, when the Indigenous bases largely voted with a blank ticket in the face of the forced choice between the *Correísmo* candidate and the conservative one.

During the protests against the Moreno government's subsidy cuts, the conflict between *Correísmo* and Indigenous groups hindered the street mobilization from strengthening the political opposition that had led the left turn. After the transport unions' early exit from the protests, CONAIE and the Indigenous movement led the protests against the retrenchment (Le Quang et al. 2020). Correa's activists took part in the demonstrations, but CONAIE leaders publicly differentiated themselves from *Correísmo*. For example, when Correa criticized repression of the demonstrators, CONAIE's response was to recall past conflicts with *Correísmo*, accusing Correa of opportunism.¹² The government finally agreed to negotiate with the Indigenous movement and to back down on the subsidy cuts. At the same time, it managed to exclude *Correísmo* from the negotiations without complaint from Indigenous leaders.

In short, the rivalry between the government leaders of the left turn and the Indigenous movement prevented the 2019 street mobilizations, and even failed retrenchment, from translating into higher political costs through the consolidation of a broad opposing sociopolitical coalition. Despite the government's defeat, the political damage did not result in the formation of a sociopolitical coalition among the social movements that led the street protests and the partisan opposition. The type of sociopolitical coalitions established during the left turn influenced the way the policy legacies of that period operated as an obstacle to the formation of opposition coalitions.

When social movements were not part of the left-turn government coalitions, their opposition to retrenchment and street protest during the right turn did not ultimately lead to empowering a partisan opposition. In contrast, when prior sociopolitical coalitions did exist, as in the Argentine case, channels between the protest organizing and party politics could be revived, strengthening partisan oppositions. The veto power of social movements and the weight of the policy legacies of the left turn worked in both cases as obstacles to retrenchment. However, it was only when sociopolitical coalitions between parties and movements forged in the left turn existed that this blockage increased the political costs of conservative attempts at reform, culminating in a stronger political opposition.

CONCLUSIONS

The end of the left turn occurred in the context of depletion of the extraordinary resources provided by the commodities boom. It was also a context in which the legitimacy of those progressive governments was being weakened by their inability to resolve longstanding social problems (in particular the provision of better-quality public services and public transport) and corruption allegations. However, in most cases, societies were not experiencing severe economic crisis, and as a result, the economic context did not facilitate the reversal of the distributive consensus. An exception is the case of Brazil, where a more radical right emerged in a context of greater economic constraints and the collapse of the PT's legitimacy (Rennó 2020). These conditions at the end of the left turn created restrictions for the right turn in places where a moderate right (Argentina, Chile) took power, as well as in mixed cases, such as Ecuador.

Conservative parties won with an electoral appeal more political than economic, and once in government, when they wanted to make austere economic policies that included retrenchment, they encountered obstacles to their agenda, both in public opinion and in the streets, as social actors affected by those policies mobilized in protest. Right-wingers won by moderating their economic discourse, accepting the expansion of social rights (Fairfield and Garay 2017), and betting on a discourse of moralization of politics, but when they attempted public spending cuts that implied affecting social policies—mobilizing the frame of criticism of populism associated with excessive public spending and “shortcuts”—they aroused opposition based on the policy legacies of the previous cycle, both among organized social actors and in the realm of public opinion, where a pro-state and distributive consensus prevailed (Levitsky and Roberts 2011).

Moreover, right-turn governments had to deal with some of the unsatisfied demands bequeathed by the governments of the left turn in terms of the provision of public goods and social policies, which conspired against fiscal austerity programs. These limits to conservative reformism are related to what has been identified by the literature on right-wing parties: in a region with high levels of inequality, the space for a classic right-wing program remains limited in the absence of critical junctures that redefine the consensus (Luna and Rovira Kaltwasser 2014).

Existing scholarship on policy change in Europe and the United States has shown the challenges of retrenchment (Pierson 1994). It has described different political strategies for dismantling institutions associated with the welfare state. More recently, other studies on the political costs of retrenchment have identified the electoral consequences of retrenchment. They specify, in European cases, the differential costs between left-wing and right-wing parties (Giger and Nelson 2011) and between different social democratic parties as a result of the type of electoral system and competing parties (Arndt 2013).

This article has not focused on the electoral costs of retrenchment. In the Argentine case, the electoral costs are difficult to measure, as a severe economic crisis occurred between the reform analyzed here and the following presidential election—

probably among the main causes of Macri's failure to win re-election. Instead, this study identifies the conditions under which blockages to a retrenchment process can lead to the formation or the strengthening of an opposing political coalition. Thus, even when a reform is successful, it produces a paradoxical effect by strengthening obstacles to a broader reform agenda. The 2017 pension reform process in Argentina was a Pyrrhic victory that increased obstacles for the larger retrenchment project. In fact, the pension reform was the last that the Macri government was able to carry out.

The contrast between the Argentine and the Ecuadorian cases allows us to see that preexisting ties between popular movements and parties of the left turn increase the political costs of the retrenchment, leading to the unification of street and party actors, thus strengthening political opposition. When the governments of the left turn succeed in establishing cooperative links with the organized popular sectors, it becomes possible to reestablish an alliance in defensive contexts. The Peronist opposition was strengthened by the street mobilizations against the pension reform, even when it failed in its parliamentary attempt to block the law. *Correísmo* was not strengthened by the mobilizations against the cut in fuel subsidies in Ecuador, even when the weight of the mobilization and the riots blocked the cut in subsidies. To the contrary, the separation between the Indigenous movement and Correa's movement deepened during and after the October 2019 protests.

While the logical possibility exists of building ties between movements and parties that had no previous relationships, this option is not consistent with either the data (we know of no such cases) or with theory, which holds that building relationships (including cooperation, coordination, and trust) between parties and movements is a laborious and slow process for which there appears to be no shortcut (Anria and Cyr 2017). Critical junctures of conflict can generate incentives for cooperation, but for a sociopolitical coalition to be built, much more is needed.

All in all, in order to understand the limits of the right turn and the conditions under which the policy legacies of the previous period raise the political costs of the retrenchment, it is necessary to identify the type of sociopolitical coalitions that were forged during the left turn. According to the scheme proposed in this article, leftist coalitions with deeper social roots have a greater chance of leaving strong and lasting organizational legacies.

NOTES

The authors benefited from the participants' comments at the 2019 REPAL Annual Meeting, where a previous version of this paper was presented. In particular, we are thankful to Jennyfer Cyr and Juan Bogliaccini for their helpful comments on earlier versions of this article. We also thank the anonymous reviewers for their valuable comments and suggestions.

1. The literature on the political economy of pension reforms in Latin America is vast and comprehensive (Castiglioni 2005), both for the 1990s (Kay 1999; Cruz Saco and Mesa-Lago 1998; Mesa-Lago and Müller 2002; Madrid 2003) and for the reforms that took place during the left turn (Niedzwiecki 2014; Holland and Schneider 2017). These works studied the social coalitions that blocked or promoted reforms (Bril-Mascarenhas and Maillet 2019; Fairfield 2015; Etchemendy 2011).

2. In 2005 and 2014, two pension inclusion processes benefited older adults who had not completed their contributions to the retirement system. The first included 2.5 million new beneficiaries, and the second, half a million. These measures favored vast sectors of the lower middle classes.

3. According to the 2016–17 LAPOP survey, in Argentina, 86.2 percent agreed or strongly agreed with the statement, “Government is better at providing pensions than the private sector” (LAPOP 2016–17 database).

4. This position aroused the opposition of government hardliners, who proposed an iron fist policy in the face of street protests and a cutback in social aid administered by the social movements. “In the social areas of our government they thought that there was a possibility of an agreement, an alliance, a friendship with the social movements [of the urban poor], and I remember that in a meeting I said ‘Look, I have known Pésico [leader of the Evita Movement] since I was 16 years old, Pésico is a political cadre whose objective is to build a social power to confront us’” (Minister of Security 2020).

5. The chief of cabinet affirmed, despite objections in public opinion and from the opposition but also from the ruling party’s own bench: “We consider that it is not true that pensions are being reduced. Pensions are not going to be reduced, they are going to grow” (Mayol 2017).

6. For instance, Deputy Facundo Moyano, son of a historical union leader, was an early critic of the PJ (Partido Justicialista, Peronist) senators’ support of the reform (*La Nación* 2017b).

7. For instance, Longa (2019) portrays the unease of the Movimiento Evita’s grassroots over the decision to support a list opposed to Cristina Kirchner in the 2017 elections.

8. According to one of the leaders of the Evita Movement, they were finding it increasingly difficult to have their demands heard by the government (Navarro 2020).

9. The conflict between Cristina Kirchner’s government and the unions over this decision quickly became public. Crossed criticisms escalated. For example, Kirchner said of the truck drivers’ union leader, Hugo Moyano: “It would be very interesting to discuss in Argentina this issue of doing socialism with the money of the state and of others, and being liberal when they touch your pocket, especially if you want to continue calling yourself a Peronist” (Franco 2012).

10. According to Juan Grabois, the leader of the Confederation of Workers of the Popular Economy (in Spanish, CETEP) during the Macri administration, “we passed three laws, the Food Emergency Law was the last one, which doubles the food aid budget; and two other very important laws: one is the Popular Neighborhoods Law [which establishes the bases for their urbanization]; and the other is called the Social Emergency and Popular Economy Law, which establishes very important things, such as the Complementary Social Wage, which is a new social right that did not exist in Argentina, and the denomination ‘worker’ to the comrades of the popular economy, who were not called workers until then” (Grabois 2019).

11. The fact that this affinity favored a regrouping of the sociopolitical coalition of the left turn was corroborated in the interviews we conducted with leaders of the social movements of the urban poor and with union leaders. The coordination of social movements in the streets began early. According to one of its leaders, in February 2016 “we foresaw a scenario that was going to have many social difficulties. In that context, we worked with many social movements to articulate the resistance in the streets” (leader of Barrios de Pie, Daniel Menéndez, interview with the authors, March 9, 2020). Now the coordination between the street and the Congress was added.

12. The official Twitter account of the Indigenous movement published the following statement: “Miserable! @MashiRafael We reject shameless opportunism, *Correísmo* criminalized us and assassinated comrades for 10 years, today it intends to take advantage of our platform of struggle.” https://twitter.com/conaie_ecuador/status/1181432171589844992?lang=es

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