

The Political Origins of Social Security in Mexico during the Cárdenas and Ávila Camacho Administrations*

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This study compares efforts to adopt social insurance legislation in the administrations of Lázaro Cárdenas and Manuel Ávila Camacho in Mexico to explain the political origins of the welfare state in Latin America. The author argues that the adoption and implementation of social insurance in Mexico was the outcome of an implicit bargain between organized labor and the state following the 1940 presidential election. This bargain signifies the rebuilding by the Ávila Camacho administration of the cross-class coalition originally designed by President Cárdenas and jeopardized by the nationalization of petroleum and presidential succession struggles of the late 1930s.

Este trabajo compara esfuerzos a implantar legislación del seguro social en las administraciones de Lázaro Cárdenas y de Manuel Ávila Camacho en México para explicar los orígenes políticos del Estado de bienestar en América Latina. La autora discute que la adopción y la implantación del seguro social en México fueron resultados de un negocio implícito entre la clase trabajadora organizada y el Estado que seguía la elección presidencial de 1940. Este negocio significa la reconstrucción por la administración de

*Research for this study was made possible by an International Predissertation Fellowship from the Social Science Research Council and the American Council of Learned Societies with funds provided by the Ford Foundation, an International Dissertation Research Fellowship from the Social Science Research Council with funds from the Andrew W. Mellon Foundation, and by a National Science Foundation Traineeship in Democracy and Democratization administered by the University Center for International Studies at the University of North Carolina at Chapel Hill. Dr. Francisco Zapata facilitated my access to the Archivo Incorporado Ignacio García Téllez at El Colegio de México. Alexander Hicks, Evelyne Huber, James McGuire, Scott Morgenstern, and anonymous reviewers of *MS/EM* offered useful and appreciated comments on earlier versions of this article; remaining flaws are the author's responsibility.

Ávila Camacho de la coalición de clases diseñada por presidente Cárdenas y comprometida originalmente por la nacionalización del petróleo y de las luchas de la sucesión presidencial de los finales de los 30s.

Despite considerable theoretical gains in our understanding of the origins of modern social insurance programs in industrialized countries, relatively few studies of such programs in Latin America directly address or challenge the theoretical approaches used in the European and North American contexts. There is little research on the origins of the fairly comprehensive social security programs implemented early in this century in many Latin American countries.¹ This essay contributes to our understanding of the origins of the welfare state in Latin America through a controlled comparison of two proposals for social insurance legislation in Mexico, one of which ultimately led to the creation of the Mexican Social Security Institute (Instituto Mexicano de Seguro Social, IMSS) in 1943. Such comparisons can be used to isolate the key factors that explain political outcomes. In particular, this analysis addresses two substantive questions related to social insurance in Mexico. First, why did the progressive president, Lázaro Cárdenas (1934–1940), *fail* to pass social security legislation amidst other reformist policies in the late 1930s? Second, why was social security legislation later passed in 1943, *after* the dominant party had established control of the Mexican regime and a more conservative president had taken office?

Of the main theoretical approaches to the creation of the welfare state in industrialized nations, the earliest explanation posited that industrialization and its concurrent urbanization led to and necessitated a social safety net for industrial workers. Indeed, the standard explanation for establishing the IMSS emphasizes the importance of rapid industrialization and urbanization for developing a propitious context for the creation of the social insurance program. It is also argued that international policy diffusion through the International Labor Organization (ILO) has provided favorable conditions. However, the standard explanation contends that key decisions among the Mexican ruling elite ultimately led to the adoption of social security in 1943 to build labor support, co-opt labor dissenters and to “increas[e] productivity and pacify . . . the workplace” (Spalding 1980: 424). Further, it is contended that “labor leaders had not issued any forceful demands for a social se-

1. The exceptions are the extensive work by economist Mesa-Lago (1978) and case studies by Spalding (1978) and Malloy (1979).

curity policy and played no important role in initiating the policy" (Spalding 1980: 425). While certain contextual conditions may have facilitated social insurance adoption in Mexico, I will argue that the creation and initial design of the IMSS is best understood as the result of demands for social insurance and pressure brought to bear on the state by organized labor. Social security also solidified labor's participation in a cross-class alliance supporting the regime between industrial workers and a narrow segment of the dominant class. This argument also emphasizes the political independence and influence of organized labor in the early 1940s in Mexico.

To begin, I briefly outline the theoretical approaches to the study of the welfare state to show the range of possible explanations that might be relevant in the Mexican case. Then, I examine the failure of President Cárdenas to implement social security provisions during his administration and the subsequent success of President Ávila Camacho (1940–1946) in passing such legislation, paying particular attention to the theoretical approaches discussed in the first section. The comparison of these two cases serves to highlight the factors most decisive in explaining the foundation of Mexico's welfare regime. Finally, I discuss the significance of these findings for our understanding of the origins of the welfare state in developing countries and of postrevolutionary Mexican politics more generally.

Theoretical Perspectives on the Welfare State

In the literature, the welfare state usually consists of five core social insurance programs: old age and disability pensions, health care, work-related injury and illness insurance, unemployment insurance, and family allowances. In Mexico, only the first three have been adopted and thus form the basis of the Mexican welfare regime. Research on the welfare state in advanced industrialized countries has generated several broad theoretical frameworks used to explain the evolution of these policies.

First, the "logic of industrialism" explanation posits that economic surplus produced by development leads to welfare state spending; therefore, countries with higher levels of economic development should also have higher levels of welfare state effort with respect to the types of welfare programs implemented and social spending (Cutright 1965; Wilensky 1975). According to this approach, the urbanization associated with industrialization leads to the concentration of workers in urban centers without the benefit of their traditional familial safety networks in times of work-related disability, unemployment, or old age.

Second, the fact that some late-developing nations, like Mexico, adopted welfare state policies at an earlier stage of economic develop-

ment has led some researchers to argue that late adopters were influenced by the policies prevailing in Europe (Collier and Messick 1975). Recent cross-national quantitative work has suggested that contact with international organizations, such as the ILO, has influenced the timing of adoption of social insurance legislation (Usui 1994).

Third, state capacity and institutions may influence the creation of welfare states (Skocpol and Amenta 1986). Decentralized states may result in decentralized welfare state policy adoption, as in the United States in the late nineteenth and early twentieth centuries (Theda Skocpol 1992). In general, centralized states with greater state capacity have a greater ability to implement wide-ranging social policies than decentralized states with weak capacity.²

The fourth broad explanatory category suggests that welfare state creation is related to the development of pluralist democratic institutions (Cutright 1965). Others have argued that increased suffrage or competitive elections in industrializing countries led to the expansion of welfare spending (Skocpol 1992). Such explanations usually rest upon an assumption that effective elections and democracy result in the adoption of social programs due to pressures from potential beneficiaries of the policies.

Another type of pluralist explanation suggests that in democracies welfare policies result from women's movements from within and from outside the state (Skocpol 1992; O'Connor, Orloff, and Shaver 1999).³ In Latin America, Chilean women were associated with popular governments and their commitment to social programs from the 1920s through the 1940s (Roseblatt 2000). While women have historically been important proponents of social programs in general, they have often emphasized policies that focus on the family as a unit or specifically on the welfare of children and women.⁴ While female *workers* are likely to be strong supporters of social insurance legislation, it does not nec-

2. In a similar vein, state bureaucrats have also been implicated in the development of policies (Hecló 1974). Though IMSS bureaucrats were later given the prerogative to expand the coverage of social insurance benefits, as Spalding (1978) suggests, such mid-level bureaucrats were not a likely source of social insurance policy at its foundation.

3. When women have played significant roles in the formulation of welfare policies, it has almost always been in the context of democratic institutions.

4. In many instances, women mobilized around these issues on the basis of social motherhood or their identities as mothers. While soup kitchens, school lunch programs, health care for the needy, and family assistance programs are important sources of public welfare, they are conceptually distinct from social insurance, which at its core is designed to protect workers. The gender biases common to social insurance programs and their conception as the basis of the welfare state are well documented (O'Connor 1996; Orloff 1993).

essarily imply that women's movements, in general, will be strong advocates for social insurance policies. Instead, women's organizations in Mexico in the late 1930s and early 1940s were largely mobilized around the issue of women's suffrage, as discussed below.

Other pluralist arguments emphasize the role of specific beneficiaries and their demands upon the state for benefits. For example, in Latin America, certain groups, such as the military and civil servants, were able to pressure the state for special benefits and continue to enjoy special status in most countries (Mesa-Lago 1978). While pluralist explanations may be plausible in democratic contexts, such as Western Europe or Chile in the early twentieth century, Mexico did not have significant experiences with democracy during the last century. Instead, the foundation of Mexico's welfare regime occurred just as the ruling party was consolidating control of the state that would persist until the end of the twentieth century, suggesting another type of explanation.

Fifth, some authors have instead suggested that there are several distinct "paths" or combinations of political regimes that lead to different trajectories of welfare state development (Hicks, Misra, and Nah Ng 1995). German Chancellor Otto von Bismarck's enactment of social insurance in the 1880s to preempt labor demands is the prototypical example of a politician initiating social insurance legislation from above (Rimlinger 1971), and Getulio Vargas's Brazil has been cited as a similar example in Latin America (Malloy 1979). Rose Spalding's (1978 and 1980) analysis of the creation of the IMSS in 1943 most closely parallels this type of top-down, state-centric reasoning. In particular, the president and a core group of bureaucrats were credited with having the foresight to enact Mexico's first social security legislation. Indeed, such an explanation might seem obvious to students of modern Mexican politics, given the regime's authoritarian character.

Analyses of welfare state development that emphasize the role of high-level bureaucrats or politicians in the creation of social policies from above are closely tied to arguments about corporatist institutions, especially where those institutions are considered instruments of state control of subordinate groups, such as organized labor. The ability of the labor movement to demand social insurance in Latin America has been complicated by factors that have not necessarily affected labor in Western Europe. For instance, a large number of surplus workers in some countries have hurt the bargaining position of labor. Likewise, high levels of informality or a large rural work force has limited the size of the organized labor sector. Perhaps most important, in most countries corporatist arrangements have sometimes served to limit labor's autonomy or participation in politics. The incorporation of labor into national politics in the early twentieth century in Latin America usually resulted in

corporatist relations that differed markedly from their European counterparts. In most instances, such corporatism either excluded labor from effectively participating in politics as such or subordinated the goals of labor to those of the state.

In Mexico, labor's formal incorporation into national politics began during the Cárdenas administration, when the foundations of a corporatist arrangement among the state, labor, and peasants were laid. In particular, labor's early relationship to the state was influenced by a series of inducements for and constraints on labor that often institutionalized corporatist relationships that shaped class coalitions and compromises (Collier and Collier 1979, 1991). Mexico's first federal labor law (1931) reflected fairly generous inducements (such as legal recognition and a separation exclusion clause) for labor to cooperate with the state and less restrictive constraints (monitoring of member lists and finances) than in other Latin American countries (Collier and Collier 1979). In contrast to claims that the Cárdenas administration signaled the end of the incorporation period for labor (Collier and Collier 1991), revisions to the labor law in 1941 and the promulgation of social security in early 1943 should be viewed as further constraints and inducements for labor following the defection of key labor organizations from the government's party just before the 1940 presidential elections. The following discussion of these laws should be considered an example of the continuous and ongoing negotiations that result in implicit bargains between labor and the state.

A sixth category of explanation emphasizes class interests and their role in welfare state development in advanced industrialized democracies.⁵ Social democratic theory suggests that the organizational and related political power of organized labor explains the development of broad, universalistic welfare states in Northern Europe (Stephens 1979; Korpi 1983). According to these interpretations, organized labor's relationship with social democratic political parties and those parties' capture of the state in elections enabled the state to enact social welfare policies. Over the last decade, some authors have refined this view of working-class power. While they do not deny that welfare regimes reflect their class basis, they emphasize instead the coalitions formed between the organized working class and segments of other economic classes, such as labor-agrarian alliances in Europe (Gosta Esping-Andersen 1990, 1999).

In contrast, Peter Swenson (1991) argues that the red-green alliances in parliaments were a consequence of the sector-based, cross-class alliances between the organized working class and a small segment of the

5. In contrast to pluralist explanations, class-based analysis usually either explicitly or implicitly assumes a Marxist conception of the state and objective class interests.

industrialist class concentrated in the traded goods sectors in Northern Europe. While the organized working class is the most obvious beneficiary of social insurance legislation, under certain conditions segments of the capitalist class may be inclined to support the development of welfare state policies.

While these class analyses of the welfare state in the developed world either explicitly or implicitly assume the presence of a democratic regime, a class coalition approach need not rely upon the existence of democratic elections or transfers of power. Even authoritarian regimes, such as the one that has dominated Mexican politics since the Revolution, must rely upon some support base among the populace. The withdrawal of support of certain classes or the desire to build support among members of a particular class may be reflected in changes in state policies. For example, Guillermo O'Donnell's (1978) analysis of the Argentine state between 1956 and 1976 suggests that state policies can lead to shifts in the coalition supporting the state which lead to further shifts in state policies. In the Mexican case, I will argue that the foundation of its welfare regime satisfied labor demands to secure labor's support for the ruling regime. It thus consolidated a cross-class alliance between the organized working class and a narrow segment of the industrial class concentrated in small and medium-sized industries producing for the domestic market in the early 1940s.

Not all of these explanations of welfare state development are mutually exclusive. For example, the process of state-building could happen simultaneously with the process of economic development. For this reason, I juxtapose the creation of the IMSS in 1943 with an earlier attempt to adopt essentially the same legislation during the Cárdenas administration. By comparing these two cases, I am employing the indirect method of difference to draw causal inferences from the comparison. This method compares one positive outcome of a phenomenon with a negative outcome, both of which being otherwise similar in all aspects except in what is believed to cause the difference in outcome. Thus, my argument will be supported by demonstrating that conditions in Mexico in 1938 and 1943 were otherwise equal except with regard to the configuration of the class support for the Cárdenas and Ávila Camacho regimes.⁶ Essentially, I will demonstrate that social insurance legislation

6. As Ragin (1987) notes, the indirect method of difference encounters difficulty in handling multiple and conjunctural causation (40-41). For example, class coalitions may only result in welfare state creation in the presence of other factors, such as a certain level of economic development or a supportive international environment for policy adoption. While comparisons of this kind are better than simple explanations of one case without a case for comparison, the generalizability of the inferences are not absolute.

failed in 1938 because the cross-class coalition necessary for its implementation had collapsed, while it had been rebuilt following the 1940 presidential elections.

The Cárdenas Administration

Until the 1930s, social insurance initiatives were usually discussed in the context of legal codification of Article 123 of the Constitution, which addresses a broad range of labor issues.⁷ The first efforts to pass stand-alone social insurance legislation creating state-administered social insurance occurred during the administration of President Cárdenas (1934–40). The Primer Plan Sexenal of the Partido Nacional Revolucionario (PNR), which was essentially Cárdenas's electoral platform and the six-year plan for his government, included a pledge to pass a social security law (PNR 1933).⁸ With regard to labor issues, the Primer Plan Sexenal was very similar to the 1933 proposals of the Confederación General de Obreros y Campesinos de México (CGOCM), the direct antecedent of the Confederación de Trabajadores de México (CTM) (de Lara Rangel 1990: 23–5).⁹

According to Francisco Macín, a *CTMista* and one of the first *Consejeros Técnicos* for the IMSS in 1943, Cárdenas asked for the formulation of a social security proposal in response to the “gestiones [de la CTM] ante el Sr. Presidente de la República, Gral. de División Dn. Lázaro Cárdenas, para que se reglamentara la Fracción 29 del Artículo 123 Constitucional” (1961: 7). President Cárdenas also mentioned that such a law was being studied in his 1936 and 1937 state of the union addresses (Cárdenas [1936] 1978: 101; Cárdenas [1937] 1978: 108).¹⁰

Though the drafted law was completed by August 1938, it was never presented to the Congress. The proposal called for the creation of a unified, autonomous, and decentralized Institute with tripartite funding

7. For an extended discussion of efforts to address social insurance before the Cárdenas administration, see Dion (2002).

8. The PNR, which was created by President Calles, was the direct antecedent of the Partido Revolucionario Mexicano (PRM, 1938) and later the still hegemonic Partido Revolucionario Institucional (PRI). For a discussion of the early history of the PRI, see Garrido (1982).

9. The statutes of the CTM adopted in 1936 were virtually identical to those of the CGOCM (de Lara Rangel 1990: 62–3).

10. Several sources mention a social security proposal sent to congress sometime during 1935 (Sánchez Vargas 1963: 67–70; García Flores 1989: 101–2; Pozas Horcasitas 1986: 116–17). However, the exact date the proposal was sent to the Congress in 1935 is never cited, and I have been unable to find any reference to this proposal in the record of either congressional chamber.

from workers, employers, and the state to oversee the implementation of a variety of social insurance programs for industrial and agricultural workers, including old age and disability pensions, health and maternity care, and protections for work-related illnesses and injuries. Unemployment insurance was not included, though the Mexican constitution requires employers to compensate workers in the event of unjustified termination of employment (Secretaría de Gobernación 1938). According to Ignacio García Téllez, the Secretario de Gobernación at the time and later the Secretario de Trabajo under Ávila Camacho, the law was not passed due to the “graves circunstancias derivadas de la expropiación y la nacionalización del petróleo y del conflicto internacional” (García Téllez 1972).¹¹ Furthermore, García Téllez claims to have pushed Cárdenas in 1938 to pursue the adoption of the law drafted by Gobernación, but Cárdenas refused to pursue the issue, reportedly telling García Téllez, “No Licenciado, serían dos toros puntales que tendríamos que lidiar al mismo tiempo . . . Vamos sacando primero el petróleo en bien de la Nación y a su tiempo será el Seguro” (“Una entrevista . . . ” 1965: 6).¹² Having already acted against the interests of capital in the petroleum expropriation, Cárdenas decided that proposing additional legislation against their interests, such as the social insurance law, was not politically viable. Social insurance legislation was a political casualty of the oil nationalization and the collapse of the cross-class coalition that had previously supported the Cárdenas administration.¹³

During the early years of his administration, President Cárdenas had built a coalition consisting of the industrial and financial bourgeoisie and the owners of small and medium-sized enterprises that benefited from his economic policies (Hamilton 1982; Valdés Ugalde 1997; Contreras

11. García Téllez was also the second Director General of the IMSS in 1943–1946 and Cárdenas’s personal secretary briefly following his presidency.

12. García Téllez recounted this conversation often, including another interview in 1983 (“García Téllez . . . ” 1983: 4).

13. During an extraordinary session of the Congress in July 1940, Cárdenas sent a less thorough and incomplete proposal for social insurance to Congress along with several other proposals. The proposal does not appear in the *Diario de los Debates* of either Chamber. Though this proposal was similar in structure to the one drafted in 1938, it lacked the exact percentages to be contributed by each participant and an explanation of the legal means for determining such percentages in the future (Secretaría de Gobernación 1940). In comparison to the 1938 proposal, the 1940 draft is much more cursory. Congress never discussed this proposal, “pretextando que debería elaborarse un nuevo proyecto más completo” (García Cruz 1972: 69). According to labor leader Francisco Macín, “la presión de intereses económicos contrarios a la seguridad social originó se ordenara una nueva revisión del proyecto, lo que impidió que el citado Congreso de la Unión lo discutiera” (1961: 7). The legislature probably avoided the proposal in light of the intense political struggles that were occurring during the 1940 presidential elections.

1977: 173–4). Through his progressive policies, such as agrarian reform and support for organized labor's wage demands, Cárdenas had also cultivated much popular support, which he later organized under the auspices of the Partido Revolucionario Mexicano (PRM) in 1938.¹⁴ President Cárdenas enjoyed the support of a coalition of the working or popular classes and dynamic sectors of the dominant class. However, some of Cárdenas's more popular programs, such as agrarian reform, support of labor demands for wage increases, and finally the oil expropriation, created conflicts between capitalists and his administration toward the end of his *sexenio* (Valdés Ugalde 1997: 118). Capitalists, organized in the Confederación de Cámaras Nacionales de Comercio e Industria, summarized their perceptions of the Cárdenas *sexenio* in the following manner:

La ofensiva general emprendida contra las empresas privadas, produjo un verdadero pánico entre los hombres de negocios y los capitalistas, con la consiguiente desaparición del capital disponible para inversiones. Los industriales, acosados por las exigencias obreras siempre crecientes, desanimados por la poca simpatía de las Juntas de Conciliación, temerosos de las huelgas prolongadas indefinidamente con el obligado pago de salarios caídos, y obsesionados por la ley de expropiación que los líderes sindicales agitaban constantemente para apoyar sus pliegos de peticiones, no tenían ya más que una sola preocupación: realizar y salvar lo que podían de su capital, mientras las inversiones inmovilizadas se explotaban hasta el límite de su capacidad y resistencia en un esfuerzo desesperado por extraer del negocio el mayor rendimiento posible. (Confederación de Cámaras Nacionales de Comercio e Industria 1940: 100).

This statement reflects the attitudes of part of the organized business class regarding the accomplishments of the Cárdenas administration.

Despite widespread popular support for the petroleum nationalization, the industrial and financial bourgeoisie that had matured due to the economic policies of Cárdenas suddenly withdrew their support for the regime. After the nationalization in March 1938, a broad movement developed in opposition to the Cárdenas administration, which included groups organized by the northern and central industrial and financial bourgeoisie, landowners, and agents of the expropriated oil companies (Garrido 1982).

During 1939, right-wing groups, including bankers, industrial capitalists, landowners, religious elements, and even members of the Unión Nacional Sinarquista (UNS, an ultra-right-wing group), united to form the Partido Acción Nacional (PAN) (Garrido 1982: 280). The party's platform was a response to "socialist" public education, agrarian reform, and the petroleum expropriation, and in general constituted a reaction against the

14. For a discussion of popular support of the Cárdenas administration, see Córdova (1974), Hamilton (1982), and Middlebrook (1995).

principal tenets of the PRM and *Cardenismo*. The program called for the consolidation of national unity through collaboration among classes (Garrido 1982: 280), which later became one of the catchphrases of the Ávila Camacho-PRM government. The creation of the PAN in 1939 and the events surrounding the presidential succession of 1940 are signs that capital had been able to assert at least some independence from the state as early as 1940 (Valdés Ugalde 1997: 123), contrary to common perceptions. By early 1939, leaders of the northern industrial and financial bourgeoisie had decided that Juan Andreu Almazán would be their candidate in 1940 to win the presidency (Garrido 1982: 274; Contreras 1977: 132).¹⁵

In addition to capitalists and landowners, some segments of the organized working class began to move into the opposition in 1939. Dissatisfied with the undemocratic process of candidate selection within the PRM and the shift away from leftist policies (discussed below), many of the most important national industrial unions with the most organizing experience (electricians, miners, and sections of railroad workers) abandoned the CTM, the main labor organization formally linked to the PRM, to support Almazán in the upcoming elections (Contreras 1977: 77-84).¹⁶ Indeed, criticisms of the PRM regime were common in 1939, and calls for greater democracy were frequent (Contreras 1977).

Although Almazán was clearly associated with the right and with bourgeoisie interests, his platform did not differ significantly from that proposed by the PRM and its presidential candidate, Ávila Camacho. He tried to appeal to the popular classes by supporting legislation guaranteeing workers' access to health care and social security (Contreras 1977: 135-7). Furthermore, during August 1939, Almazán made conciliatory comments toward labor and claimed to support a reformist platform in the press and at his Mexico City campaign rally to generate more support among the popular classes (Contreras 1977: 140-4).

This opposition movement of capital and portions of labor dovetailed with the presidential succession struggles within the PRM that began two years before the 1940 presidential elections. Indeed, the threat posed by an organized opposition behind the candidacy of Almazán and the loss of support of the financial and industrial bourgeoisie forced the PRM to abandon some of its progressive causes and nominate a more conservative candidate to regain the support of capital and moderate in-

15. Almazán had been a precandidate for the presidency within the PRM but quickly became independent once it became clear that Ávila Camacho would receive the party's nomination.

16. Additional dissent surfaced among the rank and file of some unions that continued to support the PRM candidate (CTM, CGT, CROM, and the FSTSE), but supporters of Almazán were quickly silenced by the union leadership (Contreras 1977: 86-90).

terests (Garrido 1982: 271). Ultimately, the supporters of Ávila Camacho's candidacy within the PRM, principally the CTM and the Confederación Nacional Campesina (CNC), were able to impose him as the PRM's candidate, bypassing any internal formal procedures for candidate selection (Garrido 1982).

In the end, the opposition coalition consisting of diverse labor, capital, and middle-class religious interests that supported Almazán began to fall apart in late 1939 and early 1940. Following Almazán's leftist proclamations in August 1939, many of the northern capitalists began to withdraw their support for his campaign (Contreras 1977: 158). Although the PAN, created later that year, officially supported Almazán and many of its supporters were active in his campaign, the PAN as an organization was not (Contreras 1977: 166). Furthermore, key groups began negotiating secret pacts with Ávila Camacho's campaign manager and future Mexican president Miguel Alemán. For example, the northern capitalists who were concentrated in Monterrey, Nuevo León, agreed to support the PRM's candidate in exchange for the right to designate the future governor of their state and the municipal president of Monterrey (Contreras 1977: 167).¹⁷ Likewise, Miguel Alemán signed a similar agreement with the leader of the UNS, which claimed to represent 300,000 peasants in 1940, offering them titles to collective landholdings in exchange for not participating in the 1940 elections (Contreras 1977: 168). Ávila Camacho made at least four trips to Monterrey in October 1939 presumably to court the support of northern elites (Niblo 1999: 85). Thus, the most powerful capitalists had been brought back into the fold of the PRM, leaving Almazán without a powerful support base. The withdrawal of or lukewarm support for right-leaning groups and capital ultimately undermined Almazán's candidacy and facilitated the PRM's fraudulent capture of the 1940 presidential elections.

The 1940 presidential elections were the most violent in the recent history of Mexico. The morning of the elections, the CTM and PRM affiliates occupied the polling sites, and the violence and fraud that ensued went beyond the "traditional" violence that had come to accompany election day in Mexico (Garrido 1982: 293-5; Niblo 1999: 87-8). The same day as the elections, the PRM candidate, Ávila Camacho, was declared the winner with 93.9% of the official votes. Opposition candidate Almazán, with only 5.7% of the official vote and not able to find backing either among the Mexican elite or in the United States, went into exile

17. Business leaders in Nuevo León were probably anxious to secure such a bargain given the political conflict following the 1936 gubernatorial election when Cárdenas imposed the PRM candidate against the wishes of local political and business leaders. For a discussion of the Nuevo León conflict, see Niblo (1999).

in Cuba shortly after the elections (Garrido 1982: 294–295). Almazán was the first major challenger to the PRM's hegemony, and the extent to which the PRM resorted to fraud and violence reflects the real threat posed by his candidacy and highlights the authoritarian means to which the regime's leaders would resort to maintain control of the state. The opportunity for Mexico to become democratic was forgone as a result of the 1940 elections.

The Ávila Camacho Administration

The succession struggle within the PRM and the highly contested presidential election of 1940 became the backdrop for the initiation of the process that would lead to the adoption of the *Ley de Seguro Social* in January 1943. The *Segundo Plan Sexenal*, which would become the PRM and Ávila Camacho's electoral platform in 1940, was originally drafted by the CTM in 1939 and reflected the labor confederation's commitment to the principles of Cardenismo.¹⁸ However, some members of the PRM felt the Plan and many of its proposed policies and reforms were too leftist and might further alienate the capital interests that still supported the PRM after the oil nationalization. The CTM had to revise the Plan, cutting many of its reform proposals. However, the Plan's commitment to pass a social security law within the first year of the new administration was not compromised (Garrido 1982: 273, 281, and 285; Pozas Horcasitas 1990: 120), suggesting that social security was an important demand of the organized labor sector of the party.

With regard to the adoption of social security legislation, the final version of the Plan resembles early demands for social security incorporated into the statutes of the CTM in 1936. Article 20 of the *Segundo Plan Sexenal* states:

Durante el primer año de vigencia de este plan se expedirá la Ley del Seguro Social, que debe cubrir los riesgos profesionales y sociales más importantes, debiendo aportar el capital necesario para ello la clases patronal y el Estado y en cuya organización y administración debe intervenir las clases obrera organizada. (Quoted in García Cruz 1972: 69)

During his speech at the *Segunda Convención Nacional* of the PRM in November 1939 where the plan was adopted, Lombardo Toledano reiterated labor's demand for social security and claimed that the PRM was

18. According to CTMista Francisco Macín, the CTM participated in the formulation of the *Segundo Plan Sexenal* (1961: 7). Others have suggested that Lombardo Toledano himself drafted the plan (Niblo 1999: 80). The CTM also actively participated in determining the electoral content of Ávila Camacho's campaign (Acedo Angulo 1990: 92).

the only party that would provide protection for workers (“Discurso pronunciado . . .” [1939] 1986: 596).

In comparison, the statutes of the CTM at its foundation in 1936 stated that the CTM “Luchará por la implantación del seguro social, en todos sus aspectos, por cuenta de los patrones y del estado” (CTM [1936] 1986: 114). Common to both statements was the principle that the state and employers, not workers, should pay for social security. In addition, the CTM had also wanted organized labor to have a role in the organization and administration of social security (Macín 1961: 9). In February 1941, the CTM reiterated its support for a new social security law at its national congress (CTM [1941] 1982: 1126).

During his inaugural speech, Ávila Camacho reaffirmed his party’s pledge to pass social security legislation. On June 2, 1941, just over six months after taking office, Ávila Camacho created a technical commission consisting of representatives of labor, employers, and various state ministries to formulate a proposal for a social insurance law to be submitted to Congress (“Acuerdo presidencial . . .” [1941] 1943: 11–13). The commission included seven representatives from each sector: labor, employers, and the state (García Cruz 1972: 73–4). In reality, however, the CTM enjoyed a strong position in the commission because five of the seven labor representatives were from the CTM or unions formally affiliated with the CTM (and a sixth represented a federation, the FSTSE, that had been previously affiliated with the CTM), and the two congressmen officially representing the government (as part of the seven government delegates) were in fact CTM representatives.¹⁹ Thus, seven of the twenty-one members were officially affiliated with the CTM and an eighth was from a sympathetic union. According to one CTM delegate, the commission’s discussions were often long and almost always “*acaloradas*,” heated, by the different points of view between the labor and employer representatives (Macín 1961: 9).

19. The labor organizations represented were the CTM, Sindicato Mexicano de Electricistas (SME, also of the CTM), Sindicato de Trabajadores Mineros y Metalúrgicos y Similares de la República Mexicana (STMMSRM), Sindicato de Trabajadores Petroleros (also of the CTM), Sindicato de Trabajadores Ferrocarrileros (STFRM, also of the CTM), Sindicato de la Industria Textil y Similares (also of the CTM), and Federación de Trabajadores al Servicio del Estado (which had belonged to the CTM until federal regulation in 1938 prohibited its membership). In addition, the Federal Deputy (Alberto Trueba Urbina) and Federal Senator (Alfonso Sánchez Madariaga) were also affiliated with the CTM. The employer organizations represented were Cámara Nacional de Electricistas, Confederación de Cámaras Nacionales de Comercio e Industria (CONCANACO), Confederación de Cámaras Industriales (CONCAMIN), Cámara Nacional de Transportes y Comunicaciones, Cámara Minera de México, Confederación Patronal de la República Mexicana (COPARMEX), and Asociación Nacional de Empresarios de la Industria Textil. The remaining representatives were Miguel García Cruz (of the Secretaría de Trabajo) and representatives of other ministries.

Around the same time that Ávila Camacho created the technical commission charged with drafting the new social insurance legislation, other events took place that directly affected labor's relationship with the state and may have contributed to the timing of the formation of the technical commission. In March 1941, the *Ley Federal del Trabajo* was reformed, formalizing the procedures that unions must follow prior to going on strike. The reforms also established sanctions against strikes that did not follow proper procedures, or illegal strikes. Overall, the reforms increased the state's regulatory control over the labor movement (Medina 1979: 290; López Villegas 1990: 163-4; Middlebrook 1995: 70).²⁰ The creation of the technical commission to study social insurance a few months after the regulatory reforms to the labor code has been interpreted as a compensatory offer to labor in exchange for the heightened state regulation of strikes (Medina 1979: 290, 293).

A preliminary draft of the law was presented to employers who, according to *Secretario de Trabajo Ignacio García Téllez*, were concerned about the actuarial calculations and how much the legislation would cost them ("Una entrevista . . ." 1965: 8). The law was thus delayed because Mexico lacked actuaries specialized in public social insurance. García Téllez called *Osvald Stein* (director of the Social Insurance Section of the ILO) to ask for his assistance in executing the necessary calculations. Soon after, Stein's colleagues *Paul A. Tixier* (vice president of the ILO) and *Emilio Shoenbaum* (co-author of several European social insurance systems) joined him in Mexico to help prepare the actuarial calculations ("Una entrevista . . ." 1965: 8; "Como nació . . ." 1966: 2). Given the need for actuarial studies, the technical commission did not finish its study and proposal until late 1942, delaying the passage of the law by over a year (Pozas Horcasitas 1986: 121; Medina 1979: 293, fn. 139). Once the document was completed, nearly all of the labor unions and employers and industry organizations that had participated in the *Comisión Técnica* formally approved it (López Villegas 1990: 166).

While business and industry leaders publicly supported the legislation, some business leaders were privately urging President Ávila Camacho to abandon the social security project. According to García Téllez, "Todo parecía bien, pero los patrones se habían alarmado, por ignorancia . . ." and one night in 1942 the president of the *Cámara de Diputados*, *Federico Medrano*, called to tell him that the proposal would fail because there were millions of pesos available to prevent its adoption ("Como nació . . ." 1966: 2). Alarmed by the opposition, García Téllez spoke with President Ávila Camacho, who assured him that the law

20. Other constitutional reforms in late 1941 were designed to increase the state's capacity to intervene in labor conflicts (Medina 1979: 290-3).

would be passed. As García Téllez recounted the discussion with the president, Ávila Camacho also saw the social insurance legislation as a means to repudiate his popular reputation as a conservative and leave a social legacy for his administration (“Como nació . . .” 1966: 2).

In 1942, in response to employer opposition, Fidel Velásquez issued another pronouncement in support of the proposed social security legislation at the CTM’s national congress and pledged to fight for its adoption, despite opposition from employers and insurance companies. He also urged Ávila Camacho to use his extraordinary powers as president to implement the legislation (Macín 1961: 9). In late October 1942, the Consejo Obrero Nacional, a group uniting the largest labor confederations that had formed earlier that year, issued a formal statement in support of the proposed Ley del Seguro Social (García Cruz 1972: 75–6).²¹ According to García Téllez, they were at the point of “posponer [la ley] y desmembrarla y aún enterrarla” were it not for the “empuje de las más poderosas organizaciones obreras y al decidido apoyo del Señor Presidente de la República Don Manuel Ávila Camacho” and guarantees of efficiency from the bureaucrats who would enact the law (García Téllez 1972: n.p.).

The proposal of the technical commission was presented to the president in October 1942, and a series of conferences were held in November 1942 to introduce the new law to the broader labor and employer community (Secretaría del Trabajo y Previsión Social 1941; *El Popular*, November 12–15, 1942). The law was later passed unanimously by both the Cámara de Diputados on December 23rd and the Cámara de Senadores on December 29, 1942 (*El Popular*, December 24 and 30, 1942); the final version of the law was published in the *Diario Oficial* on January 19, 1943. Two speeches were made in favor of the law in both the Cámara de Diputados and the Cámara del Senado by labor delegates, and no speeches were made in opposition.²²

The final law called for the creation of an autonomous, nonprofit,

21. Members of the Consejo Obrero Nacional that signed the declaration were the Confederación General de Trabajadores (CGT), CTM, CROM, Confederación Proletaria Nacional (CPN), Confederación de Obreros y Campesinos de México (COCM), SME, STMMSRM, and the Sindicato Independiente de Trabajadores Textiles de Fibras Duras (García Cruz 1972: 75–6).

22. During this period, congressional debates were halted after two speeches in favor and against. In this case, the speeches in favor were made by labor leaders, during which they cited capitalist opposition to the new law (“Discurso del C. Lic. y Dip. Alberto . . .” [1942] 1943: 210). The statement issued by the Senate Social Security Comisión in support of the legislation also mentioned that employers’ representatives “se presentaron a hacer objeciones a la ley, las que, escuchadas por la comisión, tuvieron que ser desechadas por estar fundadas en razones a todas luces improcedentes” (“Dictamen de las . . .” [1942] 1943: 214).

and decentralized Mexican Social Security Institute that would oversee the administration of workers' social insurance benefits. A commission consisting of representatives of labor, employers, and the state would oversee the Institute. The benefits provided by the Institute would be funded by a contribution of six percent of salaries by employers and another three percent each from employees and the state, with the exception of compensation for work-related illness and accident insurance, which would be funded entirely by employers. Fifty percent of the contributions would be used to provide medical care for workers and their families, and the other 50 percent was earmarked for disability and old age pensions and compensation for work-related accidents and illnesses. The final law did not include unemployment insurance. Benefits were originally obligatory for industrial workers, and the president would have the option of extending benefits to new groups or new regions as they were deemed suitable. Initially, only industrial workers of Mexico City were to be covered by benefits beginning on January 1, 1944.²³

Reactions to the New Legislation

Shortly after the law was adopted, several labor organizations demonstrated their support in statements made during their national congresses and in the press. In particular, the CTM, the CROM, the COCM (Confederación de Obreros y Campesinos de México), the CGT (Confederación General de Trabajadores), the CROC, the FSROC, railroad workers, petroleum workers, electricians, cinematographers, and members of the Federación de Trabajadores del Distrito Federal (FTDF) all officially supported the new Institute (Pozas Horcasitas 1990: 127, fn. 52; López Villegas 1990: 167). Although membership figures for all of these organizations are not available, it should be sufficient to point out that this list includes the major labor organizations of the time.²⁴

While employers were not publicly outspoken in their opposition to social security prior to its adoption, employers' organizations became extremely vocal in their opposition to the law once contributions began being collected in June 1943. Various employer organizations expressed their dissatisfaction with the law, asking that its implementation be delayed until after the conclusion of World War II due to the economic hardships of wartime (López Villegas 1990: 168). According to a confi-

23. The next year benefits were extended to Puebla and Monterrey and to Guadalajara in 1946 (Sánchez Vargas 1963: 121-2).

24. The CTM reported 145,471 members, the CROM 17,471, the COCM 10,170, and the CGT 5,506 (Medina 1979: 287, fn. 29).

dential memo sent by García Téllez to President Ávila Camacho in November 1944, the CONCAMIN, CONACINTRA, and the Cámara Nacional Cinematográfica had all written to the president to express their opposition to the expansion of coverage to additional regions and workers and to complain about the quality of services and the IMSS's interpretation of benefits prescribed by collective contracts.²⁵

Furthermore, private insurance companies opposed the state's monopoly of work injury and illness insurance, but the state argued that it could not allow private companies to insure the profitable cases, leaving the poor risks to the state (Pozas Horcasitas 1986: 131-4).²⁶ Various physicians' groups also opposed the implementation of the law because they were not represented in the commissions overseeing the Institute's administration (Pozas Horcasitas 1986: 122-3). Some newspapers, especially *La Prensa* and *Excelsior*, were opposed to the new social security law because they were organized as cooperatives and felt their legal status under the new law was ambiguous.²⁷ In particular, they feared the members of the cooperatives would have to pay both the employer's and the employee's contribution to receive benefits from the new Institute; their dispute was later resolved with a private "gentlemen's agreement" with the IMSS administration (Pozas Horcasitas 1986: 126-8).²⁸

In addition to these groups, a working-class movement opposing the implementation of the new law formed the Frente Nacional Proletario (FNP) on January 24, 1944.²⁹ The FNP grew out of the declining Con-

25. The IMSS interpreted the provisions of existing collective contracts to determine employer and worker responsibilities with regard to IMSS contributions and benefits. Employers complained that too often the IMSS determined that the employer was required to provide benefits in excess of the requirements of the Ley del Seguro Social. The memo sent by García Téllez to President Ávila Camacho was a response to letters sent in October and November by those employer organizations. García Téllez responds to twelve such complaints. The original memo does not include a date, but references and the content of the memo suggest that it was sent in late 1944. Letter in Archivo Incorporado Ignacio García Téllez, El Colegio de México, caja 15, carpeta 15.

26. The Ley Federal de Trabajo had allowed employers to contract with private companies for the provision of workers' compensation insurance.

27. According to Niblo, *Excelsior* was considered the mouthpiece of COPARMEX (1999: 83).

28. Due to their *own* bias *against* social security, many of the accounts of protests against the new law in the contemporary press must be weighed with caution. In response, *El Popular*, a leftist paper associated with the CTM, and *El Nacional*, the official paper of the PRM, published editorials and accounts in support of the law, which must be considered with similar wariness (Pozas Horcasitas 1986: 127).

29. The FNP claimed to represent 125,000 workers in 1944 (Spalding 1978). By 1946 the CPN (parent organization of the FNP) claimed to represent only 61,180 members (Medina 1979: 287, fn. 24).

federación Proletaria Nacional (CPN).³⁰ The CPN had left the CTM in 1942 because of political differences between its leaders and the leadership of Lombardo Toledano (Niblo 1999: 195), and it was one of the labor organizations that had signed the Consejo Obrero Nacional's declaration in support of the Ley del Seguro Social in October 1942. Though the FNP stated that it supported the idea of social security in general, the group's main goal was to stop the implementation of the new social security law if it was not reformed. In particular, the group's complaints with the law included the following: employers interpreted the law to mean they did not have to honor contracts stipulating higher benefits than those required by the new law;³¹ workers should not have to contribute toward benefits; and the CTM should not have a privileged position in the IMSS advisory commissions.³² The first two points were policy positions that the CTM had consistently sustained; the CTM recognized the need to compromise, however, to get the legislation adopted. In addition to dialogue with the government regarding their concerns, the FNP also attacked an IMSS clinic on March 26, 1944, and staged a larger protest on July 20, 1944, which ended in bloodshed. The movement dissipated soon after the demonstration of July 20 when many of its leaders were imprisoned for their participation (Pozas Horcasitas 1986: 129-30).

The exact nature of this working-class opposition movement against the implementation of the social security law remains unclear. The movement and the FNP in particular are never mentioned without some cautionary remarks regarding either the motives of the movement's leadership or its possible ties to capital interests or to the UNS. The animosity between the FNP and the CTM is obvious, and it is likely that the conflicts over social security were really about struggle for power between the dissident labor leaders of the FNP and the dominant CTM that had been simmering since the final years of Cárdenas's government (Pozas Horcasitas 1996: 130-1).³³ It has also been argued that the FNP's goal was re-

30. The CPN distanced itself from the FNP at the end of March 1944 (Spalding 1978: 163).

31. The IMSS often sided with labor unions in its resolution of these disputes. See discussion above of employers' perceptions of this process and fn. 25.

32. This is based upon letters from the FNP to the president and to the director of the IMSS, dated February 18, 1944, and March 13, 1944, respectively (Archivo General de la Nación 1980: 32-9, 44-9). See also Pozas Horcasitas (1986: 130) and López Villegas (1990: 167).

33. See the FNP's February 18, 1944, letter to the president regarding the excessive influence of the CTM in the IMSS (Archivo General de la Nación 1980) or the CTM's claim that the FNP leadership and a related organization were trying to divide the labor movement (López Villegas 1990: 153).

ally to demonstrate opposition to the Ávila Camacho government and that social security was the policy that it manipulated to achieve that end (López Villegas 1990: 168). Further, according to Luis Medina (1979: 323), the organizations leading the protests, including the FPN, were “letterhead organizations” led by outcasts from the organized labor movement who were seeking a personal following and a public audience and to compete with more established unions, especially the CTM. Despite declarations by the FPN to the contrary, several authors, including Ignacio García Téllez (then head of the IMSS), suggest right-wing capitalists or the fascist UNS were associated with the movement and were partly responsible for its activities.³⁴ While it is possible that the reputation of the opposition movement has been clouded by the “official” position of the CTM against it, the various allegations nevertheless call into question the origins and motivations of the movement.³⁵

It could be argued that the increase in strikes during 1943 and 1944 reflects labor unrest due to opposition to the adoption of social security legislation. Indeed, the official strike data for 1943 and 1944 reveal a steep increase in the number of legal strikes compared with the figures for the late 1930s and early 1940s (see Table 1). However, the strike data for 1942 are likely to be artificially low due to an agreement among the main labor organizations to temporarily renounce their right to strike for the duration of the war.³⁶ The agreement was conditional calling for an agreement with employers to submit labor conflicts to arbitration. When owners refused to enter into such an agreement, labor began to demonstrate its power by calling a number of strikes, some of which were politically motivated (Medina 1979: 307, 311-2). Furthermore, during World War II, real wages declined, and the wave of strikes in 1943 and 1944 are generally interpreted as demands for salary increases, including the large strikes by petroleum and mining workers (Roxborough 1984: 20-1; Semionov 1972: 129-31). For example, workers’ real salaries in 1941 were only 72 percent of those in 1939; real salaries in 1943 and 1944 were 76 percent and 66 percent of 1939 salaries, respectively. In addition, during 1941 through 1943, prices in Mexico City increased by 60 percent

34. See López Villegas (1990) and a letter from Francisco Urrutia López to the director general of the IMSS, March 30, 1944 (Archivo General de la Nación 1980: 16-18). See also “Como nació . . .” (1966: 2-3) and García Téllez (1968).

35. For a more detailed discussion of this opposition movement, see Spalding (1978: 158-68).

36. On June 5, 1942, the five largest labor confederations and the electricians’ union signed the Pacto de Unidad Obrera in which they temporarily agreed that during the war they would renounce their right to strike and submit labor disputes to arbitration. The pact also called for the unification of the labor movement into the Consejo Nacional Obrero (*Tiempo*, June 12, 1943, 4-5; Medina 1979: 302-5; López Villegas 1990: 158).

Table 1. *Federal and Local Jurisdiction Strikes, 1938-1947*

<i>Year</i>	<i>Strikes</i>	<i>Workers Involved</i>
1939	303	14,486
1940	357	19,784
1941	142	12,685
1942	98	13,643
1943	766	81,557
1944	887	165,744
1945	220	48,055
1946	207	10,202

Spalding 1978, Appendix.

while workers' salaries increased by only 20 percent (Semionov 1972: 129-31). Prices in the Federal District (Mexico City) went up another 29 percent between 1943 and 1944 while the minimum wage there was constant from 1938 through 1943 (INEGI).³⁷ Given the evidence of economic hardship faced by the working class in the early 1940s, it is unlikely that the drastic increase in strike activity in 1943 and 1944 reflects opposition to the adoption and implementation of social security.

The creation of the Mexican Social Security Institute in 1943 has been interpreted as the product of the "relatively independent and entrepreneurial role played by the state," guided particularly by President Ávila Camacho and a small group of technocrats (Spalding 1980). Furthermore, socioeconomic development and international diffusion have been credited with establishing a context conducive to the adoption of social insurance (Spalding 1978, 1980). However, as shown in the following section, such an explanation overlooks the dynamic relationship between organized labor and the Mexican state and the broader political context in which social insurance was adopted. Comparing the failure to adopt social insurance under President Cárdenas with the success of his successor, explains why the adoption of social insurance in 1943 should be viewed as the outcome of an implicit bargain between labor and the state in which labor accepted increased control of its activities in exchange for guaranteed social insurance benefits. Furthermore, this bargain consolidated a cross-class alliance between labor and a narrow segment of the industrialist class in support of the ruling regime. Again, such comparisons can serve to isolate the key factors that explain social phenomenon.

37. These official government figures are likely to underestimate the decline in real wages in the early 1940s (Niblo 1999: 4).

Table 2. *Mexican GNP, 1932-1944*

<i>Year</i>	<i>GNP (Millions of 1980 Pesos)</i>	<i>% Increase</i>
1932	230,346	
1933	257,259	11.68
1934	275,040	6.91
1935	293,225	6.61
1936	317,139	8.15
1937	327,320	3.21
1938	334,671	2.24
1939	351,504	5.02
1940	356,659	1.46
1941	392,534	10.05
1942	412,832	5.17
1943	429,075	3.93
1944	463,403	8.00

Brachet 1994: 200.

Explaining Social Insurance in Mexico

Based upon the experiences of advanced industrialized democracies in Europe and North America, a possible explanation for the success of Ávila Camacho's social insurance proposal in 1943 would be the process of socioeconomic development preceding the 1940s. It is true that the Mexican economy grew throughout the 1930s and early 1940s (see Table 2). However, President Ávila Camacho adopted the first phase of a strong state-led push for import substitution industrialization growth (Valdés Ugalde 1997: 126). For example, the first legislation offering new and dynamic sectors of Mexican industry tax relief and protectionist barriers for a period of five years, (Ley de Industrias de Transformación) was implemented in May 1941 (López Villegas 1990).

Furthermore, other measures of industrialization typically used in studies of welfare state development in advanced industrialized economies, such as the rate of urbanization or the economically active population employed in the secondary sector, do not suggest dynamic changes during either the presidencies of Cárdenas or Ávila Camacho. The spectacular growth of Mexican cities began after World War II (see Table 3). The difference in the percentage of the population living in cities did not change dramatically between the late 1930s and early 1940s. Further, the percentage of the economically active population employed in the secondary sector actually declined between 1930 and 1940 (see Table 4). Together, the data suggest that while Mexico's eco-

Table 3. *Urbanization, 1910–1980*

<i>Year</i>	<i>% of Population Living in Urban Areas</i>	<i>Urbanization Index</i>
1921	31.2	10.7
1930	33.5	13.7
1940	35.1	16.3
1950	42.6	23.7
1960	50.7	31.8

INEGI 1994. For calculation of index, see Unikel, et al. 1976.

conomic takeoff certainly might have begun with the Ávila Camacho administration, it could not have been either substantial or early enough to explain why social insurance legislation failed in 1938 but was initiated again in 1941 and successfully adopted the first month in 1943. Thus, while Spalding (1978, 1980) may be correct in suggesting that economic development provided a favorable context for establishing social insurance programs in Mexico, it would be incorrect to suggest (as some welfare state theorists have) that socioeconomic development alone produces social insurance legislation.

Mexico adopted three of the five core social security programs at a lower level of urbanization and industrialization than all the countries of Europe, which might suggest that international diffusion of policies rather than industrialization explains why the Mexican Social Security Institute was created in 1943. Mexico had joined the ILO in 1931 (Spalding 1978: 172), and the Secretario de Gobernación during the Cárdenas administration, García Téllez, had researched social insurance legislation in foreign contexts while preparing the draft law (“Una entrevista . . .” 1965: 6). The content of the Ley del Seguro Social was thus influenced by studies of policies in other countries and standards set by international institutions, such as the ILO. For instance, though the CTM had originally wanted social insurance to be the financial responsibility of employers and the state, the CTM ultimately had to accept tripartite funding due to international precedents and ILO agreements and recommendations (Macín 1961: 9).

Though the design of the IMSS may have been influenced by international policy diffusion, the implementation of social insurance in 1943 has its roots in domestic politics. Formal connections with international actors or institutions occurred later in the policy-making process. For instance, foreign actuaries recommended by the ILO were not asked to help with actuarial calculations until the Technical Commission had already completed a first draft of the legislation. Further, formal approval of the proposal did not come from the ILO until August 1942 (“Opinion

Table 4. *Percentage of Economically Active Population Employed in the Primary, Secondary and Tertiary Sectors, 1895-1950 %*

<i>Year</i>	<i>Primary Sector</i>	<i>Secondary Sector</i>	<i>Tertiary Sector</i>
1900	61.93	15.66	16.33
1910	67.15	15.05	16.57
1921	71.43	11.49	9.30
1930	70.20	14.39	11.36
1940	65.39	12.73	19.07
1950	58.32	15.95	21.45

INEGI 1994.

de la . . . " [1942] 1943: 23-7). There is no evidence of formal contact between ILO and Mexican officials before social insurance appeared on the Mexican national policy agenda. The international context may have influenced the content of social insurance legislation in Mexico, but its influence was not enough to lead to its adoption without the confluence of domestic political factors.

State capacity could have influenced the adoption of social insurance in Mexico. While the state was becoming increasingly centralized under Cárdenas, it is still not clear that it had the capacity to initiate a policy as ambitious as the IMSS. Insufficient state capacity, in terms of medical infrastructure and resources, in the 1940s limited the extension of social insurance to workers in Mexico City in 1944 and other industrial centers later in 1945 and 1946, even though the law would ultimately be extended to cover all workers. In the first two decades of the IMSS's existence, it subcontracted services and facilities with private physicians and clinics because the Institute did not yet have either the staff or infrastructure necessary to provide the legally mandated health services. The centralization of state resources and industrial activity in Mexico City influenced the decision to cover those workers first, and subsequent expansions were guided by similar criteria (García Téllez 1972: n.p.). Limited state capacity may have restricted the implementation of social insurance to the urban centers of industrial productions initially, but it did not prevent the state from responding to the demands of organized workers (highly concentrated in those urban areas) and providing them with social insurance coverage.

The centralization of decision-making within the state can also facilitate the foundation of welfare regimes. While President Calles (1924-1928) strove to consolidate the Mexican state and strengthen the dominant party's control over it, the political instability of the Maximato

precluded the completion of these processes. With the reorganization of the PRM in 1938, Cárdenas had centralized decision-making. The president's ability to influence the outcome of legislation in Mexico improved under both Cárdenas and Ávila Camacho due to a confluence of institutional factors. Both presidents enjoyed a unified government where the PRM dominated the legislature. Despite institutional factors that favored Cárdenas's legislative success, such as party control of the legislature, high level of party discipline, and the unity of the national presidency with the party presidency (Weldon 2000), he was still unwilling to push his social security legislation through congress in late 1938 in light of the petroleum expropriation.

Like Cárdenas, Ávila Camacho had the benefit of a unified government and a legislature dominated by PRM delegates. In the 1940 elections, the PRM again won monopoly control in the legislature by winning all senate seats and all but one seat in the Chamber of Deputies, marking the first time that the opposition had been represented in the lower chamber since the creation of the PRM. Nevertheless, this representation did not constitute a significant opposition since *all* of the presidential proposals sent to the legislature were approved unanimously. It was not until 1943 that only 92 percent of such proposals were passed with less than a unanimous vote (González Casanova [1965] 1967: 30-1). In contrast, President Cárdenas did not even have a minimal opposition to face in congress before 1940.

Ávila Camacho had the slight advantage of having additional CTM labor representatives in both the senate and the Chamber of Deputies to support his social security proposal, though this slight difference is unlikely to explain the distinct outcomes of social security legislation under Cárdenas and Ávila Camacho (see Tables 5 and 6). What the composition of the legislature does demonstrate, however, is that by 1940 the CTM, which clearly favored social security legislation, had almost completely replaced the CROM as the most politically important union organization in Mexico. As one of the main proponents of social insurance legislation, the CTM was guaranteed greater voice in its adoption than other minority labor organizations that might have been opposed. This increased the likelihood but did not assure that such legislation would be passed without significant criticism. In any case, both Cárdenas and Ávila Camacho enjoyed a high degree of centralization of power and policy-making in the office of the president.

The type of political regime at the time of the foundation of Mexico's welfare state could have played a decisive role. The welfare state literature suggests that transitions to and the consolidation of democracy usually lead to welfare state creation. However, in Mexico's case, the late 1930s and early 1940s were more like a period of transition to

Table 5. *Labor Representation in the Senate, 1936-1952*

<i>Term</i>	<i>Labor Senators</i>	<i>Labor Percentage of Total</i>
1936-1940 <i>(CTM 1, National Industrial Unions 2)</i>	3	5.2
1940-1946 <i>(CTM 6, Unknown 1)</i>	7	12.1
1946-1952 <i>(CTM 1, National Industrial Unions 3, Unknown 1)</i>	5	8.8

Middlebrook 1995: 104. See also Rodríguez Araujo (1975: 162-3).

and consolidation of authoritarianism. That is, politics were becoming increasingly authoritarian during this period, as suggested by the violence and fraud that accompanied the 1940 presidential elections. Though the Maximato and Cárdenas administrations were far from democratic, there had still been hope in 1940 of a democratic transition and fair outcome in the 1940 presidential elections. While Cárdenas did reorganize the PRM in 1938 to increase the party's control over the organized masses and thereby strengthen the party's authoritarian control of the state, its control of subordinate groups was not yet consolidated. Had the party's control of the regime been ironclad before 1940, several labor organizations might not have been able to withdraw or threaten to withdraw their support from the regime, and the presidential succession struggles of that year might not have been so severe. The extent to which the PRM had to rely upon fraud to win the presidential election reflected its political vulnerability. Often political scientists point to certain elections as the beginning of a transition to democracy, which then must be consolidated. In Mexico, the 1940 presidential elections could be called a point in the transition to authoritarianism, which was later consolidated by the administrations of the late 1940s and 1950s.

When welfare states have been created in authoritarian contexts, such as that in Bismarck's Germany or Vargas's Brazil, political scientists have argued that the initiative of political leaders explains the adoption of social insurance. Spalding (1978 and 1980) thus explained the creation of the IMSS in 1943 as the result of enterprising executive and high-level bureaucrats. However, the comparison of policy-making during the Cárdenas and Ávila Camacho administrations suggests that executive initiative alone did not produce social insurance legislation. Both presidents supported social insurance and had hoped for its adoption. Both asked Ignacio García Téllez to oversee the preparation of the legislation, and thus the same high-level bureaucrat supervised the legislative proposal under both administrations. Furthermore, in 1943 the authoritarian

Table 6. *Labor Representation in the Chamber of Deputies, 1937-1946*

<i>Term</i>	<i>Labor Deputies</i>	<i>Labor Percentage of Total</i>
1937-1940 <i>(CTM 6, Unknown 1)</i>	7	4.1
1940-1943 <i>(CTM 7, CROM 1, Unknown 1)</i>	9	5.2
1943-1946 <i>(CTM 8, National Industrial Unions 1, Unknown 1)</i>	10	6.8
1946-1949 <i>(CTM 7, National Industrial Unions 1)</i>	8	5.4

Middlebrook 1995: 103. See also Rodríguez Araujo (1975: 180-5).

regime had not yet been consolidated nor did the ruling party yet command control of subordinate groups, such as organized labor. Or, in the words of historian Stephen Niblo referring to the 1940-1941 period, "Whereas today we tend to learn first lessons about the PRI and its component parts—the CTM, the CNC, and the CNOP—as though these groups were naturally and always had been the agents of the state, that was not the case. The government of the day was involved in a massive effort to tame the labor movement" (1999: 98).

It is within this antidemocratic context that demands for policies from organized societal actors must be understood, making pluralist explanations of policy-making more difficult to sustain. While organized labor had formal organizations with direct access to political leaders within the PRM, most social movements or interest groups did not. Mexican women had mobilized and held national congresses throughout the 1930s and 1940s, but these meetings suffered due to strong differences between Catholic, middle-class women and leftist, working-class women.³⁸ Though some of the leftist feminists involved in the women's movement supported the principle of social insurance, these women were also those who were likely to favor women's mobilization within the labor and political organizations to which they belonged as opposed to a broad-based organization for women's interests. Furthermore, the struggle for women's suffrage dominated the demands of women's organizations in the late 1930s and early 1940s, including those organized

38. For a discussion of these divisions in congresses of the mid-1920s, see Soto (1990: 107) and congresses in the early 1930s, see Macías (1982: 128-37) and Soto (1990: 109). These divisions in the early 1930s led Communist women to found the Frente Unico Pro Derechos de la Mujer (FUPDM).

by leftist feminists.³⁹ Thus, the lack of formal access to policy-makers, divisions within the women's movement, and the preoccupation with women's suffrage make it unlikely that social insurance legislation was a response to demands from the women's movement.

In contrast, workers' compensation, health care, and old-age and disability pensions had been demands of the organized labor movement in Mexico since the Revolution. The roots of organized labor's support for social security can be traced through the policy statements of successive labor organizations. The CROM in the mid-1920s, the CGOCM of the early 1930s, at the foundation of the CTM in 1936, the first two six-year plans of the PRM, and the policy pronouncements of Lombardo Toledano and Fidel Velázquez in the late 1930s and early 1940s all reflect organized labor's consistent support for the adoption of national social insurance. Furthermore, organized labor has consistently argued that social insurance should not end the "lucha de clases," which is to say that social insurance should be a minimum baseline and that labor unions should be able to negotiate superior benefits in their labor contracts if they are able to do so.

Employers' organizations usually opposed legislation that would require them to contribute toward health care and pension benefits for workers and their families. Indeed, the COPARMEX had been founded to oppose labor legislation, which at the time included social insurance provisions. Employers' organizations consistently argued that social insurance should end the "lucha de clases" and instead lead to "paz social." In this case, the catch phrase "paz social" represents the policy position consistently maintained by the largest employers' organizations (CONCAMIN, CONCANACO, and COPARMEX) and by the Christian democratic opposition party, the Acción Nacional (PAN), with regard to social insurance—that social insurance should replace the negotiation of labor contracts and that social insurance benefits provided through IMSS should be the maximum required by law.⁴⁰ According to the CONCAMIN, "El Instituto Mexicano del Seguro Social debe ser un instrumento de paz social, elimi-

39. The FUPDM tended to privilege women's vote above other demands of the movement (Soto 1990: 128–30; Macías 1982: 137, 142; Tuñón 1992: 164). The FUPDM's political platform did include a commitment to social insurance (Tuñón 1992: 68–69), using language similar to that found in the CTM statutes ("seguro social a costo del gobierno y las empresas"). However, the only hint from nonfeminist sources of gender issues related to the Ley del Seguro Social was a reference by CTMista Alejandro Carrillo to the benefits that working mothers will receive due to the legislation during his address to the Cámara de Diputados ("Discurso del Lic . . . y Dip." [1942] 1943: 201–2).

40. See CONCAMIN, "Actividades" (1949) and CONCANACO (1943). The PAN's policy position regarding social insurance was that typical of Christian democratic parties in Western Europe: social insurance should protect the weakest members of society; the state

nado de la discusión entre las partes de todas aquellas materiales ya la Ley rige y estableciendo que es ella el único conducto para otorgar prestaciones [sic] de orden social" (CONCAMIN 1949). While these organizations claimed to support social insurance, it was only under the assumption that social insurance would liberate them from negotiating with powerful unions that were able to demand more extensive benefits. However, the 1943 Ley del Seguro Social granted organized labor the protections it demanded and ensured that employers who had entered contracts with unions with more generous benefits would be forced to comply with the existing contract. Further, the IMSS took out ads in not only national daily newspapers but also in the *Confederación* (the newsletter of the CONCAMIN) to remind employers and workers that labor contracts would remain in effect.⁴¹ Thus, employers became even more steadfast in their opposition to social insurance once it became clear that the IMSS would not replace the negotiation of benefits in labor contracts and that the IMSS would interpret the existing contracts to favor labor.

While most employers' organizations opposed the Ley del Seguro Social, there was one possible exception. The Cámara Nacional de la Industria de Transformación (CONACINTRA) was formed in December 1941 by 93 industrial companies (Alcazar 1970: 35-6). Though neither the CONCAMIN nor the CONCANACO mention social insurance either in their objectives or statutes, the CONACINTRA statutes include an article stating that they will study and promote systems of social security most adequate for industry.⁴² The CONACINTRA was formed by small and medium-sized members of the industrial bourgeoisie who produced for the national market and favored import substitution and state intervention in the economy for that purpose (Alcazar 1970: 35-6). Therefore, the CONACINTRA often differed from the other employers' confederations, which advocated private initiative and opposed state intervention.⁴³ The CONACINTRA considered itself a response to the

should not directly provide health care benefits; and benefits should vary according to need (PAN 1939 and "El Seguro Social . . .," 1949).

41. The CONCAMIN (1943) also printed a copy of the law with explanations of employer responsibilities. They worried that employers would be alarmed by the "demasiado fuertes" financial obligations that social insurance would entail and wanted to assure their members that they had fought against implementation.

42. See CONACINTRA (no date), Chapter 2, Article XX. See also CONCAMIN (1950), Congreso Nacional de Comerciantes (1917, the volume of the congress at which the CONCANACO was formed).

43. The CONCANACO and ninety-six industrial enterprises challenged the legality of the CONACINTRA to stop its organization. The dispute was not resolved by the Mexican courts until 1943 (Alcazar 1970: 46-47). In 1963 more than fifty percent of CONACINTRA's membership was concentrated in the Federal District, and it had no Monterrey nor Nuevo León delegation (Alcazar 1970: 107).

policy positions of previous employers' organizations, which "consistía principalmente en obstruccionar toda la legislación que proyectaba los gobiernos de la Revolución, labor que fué muy notoria en el caso de la ley que instituyó el Seguro Social" (1953: 11). At the same time, however, in late 1944 the CONACINTRA sent a letter to President Ávila Camacho to complain about the implementation of the Ley del Seguro Social,⁴⁴ and by the late 1940s even the CONACINTRA had come to oppose the further expansion of social security benefits to new economic sectors or geographic regions (Niblo 1999: 221–2). While this small segment of the industrial bourgeoisie may have supported social insurance initially and in principle, that support waned once the realities of social insurance became clear in practice.

Ultimately, Cárdenas's failure and Ávila Camacho's success with regard to social security legislation appears most closely tied to the changes in the coalitional bases of their administrations and attempts by the state to mobilize and incorporate labor into national politics. That is, social insurance legislation was not politically feasible at the end of the Cárdenas administration due to his loss of support among the domestic industrial and financial bourgeoisie and foreign capital. The oil nationalization, the result of a labor dispute between unions and foreign-owned enterprises, finally undermined the precarious coalition of bourgeois and popular interests that had supported his government. The schism caused by the nationalization of petroleum was only mended with the nomination and election of a more moderate PRM candidate. Once in office, Ávila Camacho promoted "safer" policies, including legislation that protected and promoted domestic industry.

While Ávila Camacho had to satisfy some of the demands of the labor movement, such as social security, to regain the support of labor that was undermined during the 1939–1940 electoral period, the social security concession came on the heels of legislation that further increased the state's control over organized labor's right to strike. This tradeoff reflects the give-and-take process of coalition building in Mexico under the PRI-dominated authoritarian regime; it also reflects the combination of inducements and constraints that David Collier and Ruth Berins Collier (1979) argue characterize corporatism in Latin America. Overall, the adoption and implementation of social insurance in Mexico can be explained as the product of shifting class coalitions and the need for the regime to incorporate the support of the organized working class into an institutionalized relationship with the regime.

44. The CONACINTRA was the only employer organization that sent letters to Ávila Camacho; it is not possible to distinguish the arguments made by each organization in the response.

This comparison of policy-making efforts during the Cárdenas and Ávila Camacho administrations demonstrates that the most likely explanation of the timing of the enactment of social insurance lies in the shifting coalitional bases of the regime. Though both administrations proposed similar legislation, only Ávila Camacho's administration was able to negotiate its promulgation. Other factors often hypothesized to play a role in the development of welfare policies may have provided a propitious context in which social insurance could be enacted. Industrialization, the consolidation and centralization of the Mexican state, and technical assistance from the ILO all shaped the context in which social security was adopted. The structure and capacity of the state and the recommendations of the ILO were also likely to have influenced the initial design of social insurance once it was adopted, including the regions and sectors to be offered benefits and the structure of contributions. However, these background factors do not offer a causal explanation of why social security was created during the Ávila Camacho and not the Cárdenas administration. They may have been necessary factors, but they were not sufficient. Instead, the final decision to lay the foundation of a broader social security system was a political one, in response to labor demands and as an attempt to bring organized labor back into the regime's cross-class coalition.

Understanding Social Policy-making in Mexico

By situating the foundation of Mexico's welfare regime in the theoretical debates about the creation of welfare states, this discussion helps draw parallels and distinctions between the welfare policy processes of developed and developing economies. The argument presented here should be understood as distinct from those that claim cross-class coalitions propelled social insurance legislation into existence. While the ruling party sought a cross-class alliance to support its regime, social insurance was purely a response to an outstanding demand of organized labor and an inducement to secure the support of organized labor for the government. The PRM regime used other inducements (e.g., trade protection and development loans) to secure the support of the industrial class.

The preceding explanation of social policy-making in Mexico is not an obvious one given the recent emphasis on the subordination of Mexican labor to the state. This discussion reminds us that during the late 1930s and early 1940s (especially before the *charrismo* of the late 1940s), Mexican labor organizations were important political allies that the state sought to placate and secure. During this period, the Mexican labor movement was more powerful and influential than those in many other

Latin American countries (Collier 1993). In particular, organized labor was still fairly autonomous and capable of making demands upon the state in exchange for labor's political support. The early power and influence of organized labor in Mexico stands in stark contrast to the subordinate role attributed to labor during the second half of the twentieth century. While the state was later able to subvert the autonomy of organized labor and co-opt its leadership, especially during the administration of Miguel Alemán, these later events should not be allowed to color our understanding of the bargaining that took place between labor and the state in the late 1930s and early 1940s. From the standpoint of labor leaders at that time, the potential outcomes of bargaining with the state were neither obvious nor guaranteed.

This discussion of social security policy in Mexico also highlights the dynamic relationship that labor has had with the state and emphasizes the ongoing nature of such bargaining between the state and societal groups. In this case, the defection of both organized labor and segments of the capitalist class during an electoral season gave both groups increased leverage over the state. Organized labor was able to negotiate the implementation of social insurance in exchange for its support of the regime and acceptance of regulation of the right to strike. Labor's relationship with the state was not static, however, and later administrations were able to further subordinate organized labor and co-opt its leadership. Furthermore, social policies that directly benefit organized labor should also be considered an inducement to mobilize labor support for the regime; inducements and constraints are not legislated through labor law alone. The complexity of the relationship between labor and the state calls for longitudinal studies that can explain changes over time and that consider a wide range of policies in addition to traditional labor law.

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