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**POVERTY AND MARGINALIZATION IN A GLOBALIZED WORLD
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**MEXICO: IMPOVERISHMENT AND THE CONDITIONAL
CASH TRANSFER PROGRAMMES OF THE WORLD BANK**

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Abstract

Poverty reproduces into the system, which generates it. The system creates conditions to prevail and to secure functionality. The erosion of the possibilities of intergenerational social mobility, associated with the reproduction or poverty, is not a big deal to the system as long as it allows the State legitimation.

In Mexico, at the present time, policies aimed at alleviating poverty, in terms of such legitimation, play a very important role as a means to redistribute income. These policies are linked to other programmes which correspond to the so called structural reforms of neoclassical style, but have nothing to do with the real structural conditions which produce the economics slumps, inflation, concentration of income and other restrictive policies. Programmes like these are known as programmes of Conditional Cash Transfers (CCT).

Our paper focuses on analysing the official results of poverty measurement and the evolution of the factors which affect the impoverishment process in order to demonstrate that the official programme to fight against poverty constitutes in fact an instrument to regulate it quantitatively, without improving the social conditions for the reproduction of the social forces.

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This paper intends to draw elements in order to consider the evolution of poverty itself and the impoverishment of people and their conditions of restrictive perspective growth, based on the official records of poverty.

The CCT programmes based their policies on income-consumption, and these obey only to a particular conception of poverty. Consequently, these programmes try to raise the income, in order to raise consumption. Although it is important for people to receive money to purchase consume goods, and this is a short-term aid, in the long run, it does not eradicate poverty. In fact, the CCT programmes try to invest in people as a human capital in order to secure the reproduction of the labour force. In these terms, programmes aim at people being trained or having better salaries, but do not necessarily create a better life for them.

Key words: poverty; neo-liberalism; conditional cash transfers programmes; human capital.

MEXICO: IMPOVERISHMENT AND THE CONDITIONAL CASH TRANSFER PROGRAMMES OF THE WORLD BANK

1. The approach of contemporary programmes to fight poverty

The development of capitalism has required the effective reproduction of labour force by means of a given salary, a productive environment and some social cohesion in such a way that the process of accumulation of capital is not interrupted, thus guaranteeing the continuity of a certain process where the production of wealth evolves into the production of poverty and vice versa. This means two processes, the same origin but a different nature and trajectories whose causes and effects turn them into detached beings, causing the processes to being observed and characterized in different ways through institutional paths that affect one or the other independently even if the results must be kept within certain limits in consistency with the performance of the existing socio economical reproduction regime.

The problem of poverty has existed through almost five centuries as well as the concern for poverty relief and what to do with the poor. The analysis has focused especially on the definition of its characteristics, its manifestations and its measuring more than in establishing the main determinants. The phenomenon of poverty has multiple and interrelated determinants with ample and unfavourable economic and

political effects on the society that suffers it. Poverty has existed throughout centuries, however its conception and contents have changed according to the processes and mechanisms of social cohesion that operate in accordance with the social development and consequently, with the actions undertaken to deal with it.

Poverty problems have been attended to without the acknowledgement of the dual behaviour of the economic regime in which “the production of wealth needs the production of poverty and vice versa...” (Soria: 2000). Hence, the attention given to poverty leaves aside the deactivation of poverty determinants; although the contents and application of programmes appear to be successful in fighting poverty. On the other hand, these strategies must be consistent with the essential guidelines of the hegemonic economic policy according to which the State must limit its field of action only to the deprived, those with an income below the line of poverty to help them incorporate into the economy.

2. Focusing and rationalizing. Key elements in anti poverty programmes

The suggestion of a double strategy to ensure the maximum success regarding the efforts to reduce poverty is found in the *World Development Report 1990* and is also found in the *1991 Annual Report of the World Bank*²:

“The first part of this strategy entails the inducement of an economic growth of ample base. The policies tending to the productive oriented use of the major asset of the poor – their work- favour fast growth and poverty cutback. The second part of the strategy demands obligatory social services – especially primary education, basic health services, birth control and nourishment – aiming at improving the life conditions of the underprivileged groups and widening their ability to profit from the opportunities of an income that will bring about the economic growth...[Although] even when the economic growth generates income opportunities for the poor, many of them are not able to profit from them because of bad health, lack of education, illiteracy or malnutrition. Therefore, it is twice as important to secure the access of

² See World Bank (1992), *Annual Report 1991*, Washington, D. C., especially what regards the strategies to reduce poverty, pp. 51-56.

these people to basic social services, this being the means to alleviate the immediate consequences of poverty whilst attacking one of its main causes”³.

The proposals made by Economic Commission for Latin America and the Caribbean (ECLAC or CEPAL acronym in Spanish) regarding this matter in the 1990’s, are limited to the revision of the general system of subsidies and of the instruments of social policy with the subsequent purpose of rationalizing the social expense⁴. In this way, the axis around which the programmes against poverty should spin will be: focusing as a necessary condition to rationalize, evaluation the relation cost-impact of each programme, incorporation into various social actors, (non-governmental organisms, municipalities, communities, beneficiaries and private businesses) as executors and if possible, sponsors of the programmes, giving precedence to the demand of services to catalyse the relation between the social policy of the State and the civil society⁵.

Focusing works both ways, at the same time including and excluding as it is based on the segmentation of the market, its main political objectives aiming at returning the credibility of the State and scoring mechanisms to reduce customizing. Thus, it is stated that the selection of priorities in social politics is related to the preferential dealings with problems identified by a government without discarding their being politically assessed. This implies that the government chooses to develop physical, productive or social works selecting which heading or headings will orient the investment (education, health or housing) and the various forms in which certain groups of the population are involved, to be focused on or appointed as objectives of the social policy, while others are left aside.

“Statistically, one cannot avoid the presence of errors on focusing and those responsible of implementing the social policy must decide whether to incur on an inclusion error or and exclusion one when choosing a method. An inclusion error ‘wastes’ the recourses of the programme or renders them less efficient upon including those beneficiaries

³ *Ibidem*, pp. 51-52.

⁴ See CEPAL (1995:13-28).

⁵ CEPAL (1992).

with an income above the line of poverty while an exclusion error limits the fulfilment of the objective of reducing poverty, as it does not incorporate the individuals who really need it. When comparing methods, those with a good performance regarding sub covering rates, are usually not as good in terms of reducing the leakage rate”⁶.

The population considered as the “non beneficiary target” of the program integrates the leakage rate, while the sub-coverage rate includes the “target” population that has not been reached by the programme.

The focusing programme also bears certain difficulties that ECLAC acknowledges: the expenses will grow according to how precisely it is intended to mark out the benefits and the need to have the administrative capacity to elaborate and execute the programmes.⁷ In other words, for the focusing criteria to work, the state policy must be modernized. The social expense must be oriented towards a rational demand, thus facilitating the management and execution capacity of the social apparatus of the State.

Focusing will be indispensable as long as it allows the concentration of available recourses within the population of potential beneficiaries that will be identified to attend specific problems or needs. The population will be divided to raise the impact or potential benefit *per capita*, while in the homogeneous focusing the differences and peculiarities of the beneficiaries to be are not taken into account. Nevertheless, we do not consider that such is the “modernity” of the focusing criteria, as in social politics there have always been determinations on the so called target-population: in the XVII and XVIII centuries, the idle and ill beggars that were unable to work even had they wanted to, were forced to enter the homes-workshops, the elderly were taken to homes and shelters, the orphan children and foundlings to charity homes, the widows to convents and so on.

⁶ See Hernández, Orozco y Vázquez (2005: 56) and Villatoro (May 2004: 13-27).

⁷ See Villarespe (2000:434-439) and CEPAL (1995: 13-28)

3. Measuring Poverty: background

The research carried out by Charles Booth (1891)⁸ was the first to analyse the life conditions and to classify the poor. He inter-related six variables: overcrowding, birth rates, early marriages (men and women separately) income and occupation. The eight classes in which he divided the society of his time were⁹:

1. Lower classes of occasional workers, slacks and semi criminals (society waste): very poor.
2. People who very seldom received an income: very poor.
3. People whose income was not permanent: poor.
4. People with irregular low income: poor.
5. People with average regular income: above poverty line.
6. High working class
7. Medium low class
8. Medium high class.

Later on, Benjamin Seebohm Rowntree (1901)¹⁰ distinguished between the characteristics of the poor and their behaviour and so, he divided poverty into primary and secondary, and he accepted that both were immersed in determined social and cultural conditions. He related primary poverty to an insufficient income to cover the cost of caloric foods needed by a person to keep his labour strength active. He estimated the minimum cost of the diet in York, England, over the price of food in 1899 and added a minimum cost for clothing, fuel, lesser needs and rent. He identified secondary poverty with enough income to cover the expenses of what was thought of as the essential diet but which was nevertheless insufficient as it was spent on futile things, especially drinks, thus associating it to vice¹¹.

⁸ See Freíd and Elman (1968: xi-xxxix)

⁹ See, op. cit, p. 9. The original source is Booth (1889: 33-61). It must also be considered that for Booth, the higher classes are made up by the relation of domestic employees-family members: therefore, the highest stratum is composed by the families with over eight servants, where the family members are less than the number of servants employed: Cfr. Booth (December 1893:559).

¹⁰ *Poverty: A Study of Town Life*, This book was published in London by Macmillan and Co. Limited.

¹¹ Families living in poverty may be divided into two sections: 1) those with insufficient total income to obtain the minimum of needed goods for physical efficiency only. Poverty which falls into this category may

Booth (1889) was the first to try to give an answer to the question about who the poor are. Rowntree (1901) estimated for the first time the poverty line¹² according to the relation income-consumption. Their work greatly influenced the British public opinion and the debate on the Poor Laws, upon re conceptualising poverty: poverty was structural and not only a behavioural problem. This influence marked the beginning of the XX century. Both authors showed that poverty involves assumptions of an objective character, susceptible of being measured, while the others are subjective (such as vices). Upon measuring poverty, especially Rowntree's work is still present in what regards the conception of poverty based on the monetary amount that is received and the expenditure on real state and services, that is, on the relation income-consumption.

It is quite common to measure the income of certain individuals in comparison to others, and derive from there the level of life they have and the one they would like to have through suitable policies or programmes. Therefore, in the dominant contemporary conception of poverty, being poor means lacking the recourses and services to satisfy basic needs and fully participate in society¹³. As has been expressed by the director of ECLAC Review, Oscar Altimir, poverty is often defined by norms that only cover critical situations of deprivation or else a certain percentage of the population at the base of the income pyramid. Consequently, the helping style of the programmes against poverty involve certain actions oriented towards increasing the income of the poor and the access to key services but do not imply a reorientation regarding the styles of development¹⁴. If the purpose is to satisfy basic needs and not to reform or transform the model of development, poverty will not be eradicated but, at the most, alleviated.

be described as 'primary poverty'; 2) families with a total income that would satisfy physical efficiency, this not being really so, as some part of the income is absorbed by other expenses, whether useful or useless". This kind of poverty is described as "secondary". Cfr. Rowntree, B. Seebohm (1901: 36).

¹² The fact that Booth invented the line of poverty and Rowntree perfected it "has darkened the history of the concept brilliantly used by both". See Gillie (November 1996: 729).

¹³ See Dréze, Jean, Sen, and Hussein (1995: v-vi)

¹⁴ See Altimir (March, 1982:21-23).

4. Mexico: impoverishment and controlling mechanisms

Mexico underwent a long period of economic growth. As of 1934, there began a 22-year period of average annual growth of GDI of 5.6% and then a 14-year period of an average annual growth of 6.5%, followed, until 1982 by a more modest and unstable growth. Despite this increase on the economic activity, 27.5 million poor were registered in 1960, a figure that rose to 37 million in 1977, with a two million drop due to the rise of employment during the oil boom (See Table 1).

During that period of industrialization model based on substitution of imports the process of impoverishment was controlled through social policies linked to the well being state that leaned on a group of institutional forms that contributed to the regulation of relations between capital and labour that, on one hand, affected the efficient reproduction of labour force through the provision of an indirect salary or social salary and, on the other, helped establish a climate of productivity and social peace that favoured the accumulation of capital (Soria, 2000: 22).

Table 1								
Mexico: Incidence of poverty (1960-1990)								
(Millions of people and percentages)								
Concept	1960	1963	1968	1977	1981	1984	1988	1990
	<i>Millions of people</i>							
Poor	27.5	29.8	32.8	36.7	34.6	44.6	46.1	63.3
Extreme	20.4	26.7	25.6	21.5	18.6	22.8	22.0	55.5
Non extreme	7.1	3.1	7.2	15.2	16.0	21.7	24.1	7.8
	<i>Percentages</i>							
Poor	76.4	77.5	72.6	58.0	48.5	58.5	59.0	77.9
Extreme	56.7	69.4	56.7	34.0	26.1	29.9	28.2	68.3
Non extreme	19.7	8.1	15.9	24.0	22.4	28.8	30.8	9.6
The sum of extreme and non extreme poor totals the amount of poor.								

Source: Soria (2000: 126)

Among the explicative causes of poverty, there is the drastic drop of the minimum real wages and the increment in the prices of basic goods. "To counteract

the effects of inflation on the real salary, the government founds, in the 1940's a series of institutions that begin to influence the indirect salary incorporating most of the population into the domestic consumption, guaranteeing the profitability of the enterprises, promoting the raise of real salaries and establishing an increase in social benefits (education, social security, housing programmes and food subsidies)"¹⁵.

The exhaustion of the regime of accumulation by substitution of imports, and the crisis of the bureaucratic-corporative regulation, were reflected in the deterioration of the institutional forms of social protection.

The possibility of regulating the process of generation of poverty weakened upon allowing (intentionally) the "free market" institution to play a bigger role as a regulator of the economic activity and social life through its intervention in the relation capital-labour; at the same time, there was the flexibility of the salary relation and the sudden attack against the social protection institutions. The incidence of the State in the efficient reproduction of labour force diminished when it stopped intervening in the provision of an indirect salary (social salary); likewise, the institutional forms destined to generating a climate of productivity, changed, to be carried through by means of economic pressure. The result of all this had been forecasted and announced: greater impoverishment and decrease of the welfare levels, so drastic, that by the year 2000 there were 78 million people living in poor conditions (See Table 2).

¹⁵ Soria, 2000: 148.

<p style="text-align: center;">Table 2</p> <p style="text-align: center;">Mexico: Evolution of poverty and indigence (2000-2004)</p> <p style="text-align: center;">Thousands of people and percentages</p>				
	National	Urban major Over 15 thousand inhabitants	Urban minor From 2500 to less than 15 thousand inhabitants	Rural
Poor 2000	78,370	31,373	22,941	24,056
Poor 2004	84,723	35,730	25,288	23,704
Absolute change	6,353	4,357	2,347	-352
Percentage change	8.1	13.9	10.2	-1.5
Indigence 2000	40,066	8,906	11,627	19,533
Indigence 2004	40,888	10,814	13,313	16,761
Absolute Change	822	1,908	1,686	-2,772.0
Percentage change	2.1	21.4	14.5	-14.2
<p style="text-align: center;">Source: Boltvinik (2006) and Boltvinik and Hernández Laos (1999: 313-350)</p>				

5. Mexico: contemporary programmes against poverty

In the 1970's, the exhaustion of the so called Stabilizing Development forced the Mexican State to initiate programmes against poverty with the specific purposes of mitigating social inequalities and stopping the political explosiveness. Such programmes were: the Investment Programme for Rural Development (PIDER, 1973) and the General Coordination of the National Plan for Depressed Zones and Marginal Groups (COPLAMAR, 1977), both basically oriented towards the rural sector. Before 1970, poverty faced beneficence, assistance or public charity.

At the end of the 1980's, following the outline of international institutions, World Bank and ECLAC, the Programa Nacional de Solidaridad is created, (Pronasol or Solidaridad 1989-1994). Similar programmes to that of Solidaridad were established in most Latin American countries¹⁶ such as: the Programa Federal de Solidaridad in Argentina (1992); Fondo de Solidaridad para el Desarrollo in Guatemala (1993); Solidaridad y Fondo Social de Inversión in Chile (1990); and in Colombia, Solidaridad y Fondo de Emergencia Social (1993).

In Mexico, Solidaridad spun around regional development, carrying on infrastructure works, social development and productive projects, assuming that would establish the basis for the communities to access development. It also involved social leaders that usually organized the Comités de Solidaridad and watched over the development of the works¹⁷.

In the following decade, the proposals of the World Bank regarding the struggle against poverty, take a different turn and the new programmes are called Conditional Cash Transfers (CCT), which means conditioned monetary transferences (see Table 3). While specific details vary in the design of the programme (for example, the amounts of money transferred to the unemployed, known as Cash for Work), all these programmes transfer conditioned recourses to poor families so that their children may go to school and have frequent access to medical service as a basic preventative health care. That is the main reason why transferences are made to women as these transferences are supposed to accumulate human capital. Therefore, CCTs pursue two goals: a) provide poor families with a minimum flat for consumption and b) promote the accumulation of human capital to break up the vicious circle through which poverty reproduces generationally so that the transferred amounts are directed towards food, education and health.

¹⁶ See Villarespe (2000: 440-441, table 3)

¹⁷ This program was ruled by four main principles: 1) respect free will, initiatives as well as individual and community ways of organization; 2) full and effective participation and organization of the communities; 3) social co-responsibility and 4) transparency, honesty and efficiency in the handling of recourses. Cfr. *Programa Nacional de Solidaridad*: basic information on the execution and development of the Programme (August 1994), Mexico: Presidency of the Republic, Sedesol, Secogef and Mighel Angel Porrúa, p. 3

Table 3. INDEX OF WORLD PROGRAMMES

CASH TRANSFERS

Unconditional

Household Chile, China, Indonesia, Mozambique, Pakistan, Zambia.

Child and Family Allowances Mozambique, South Africa.

Social Pensions (Old Age and Disability) Argentina, Bangladesh, Bolivia, Brazil, Chile, Costa Rica, India, Lesotho, Namibia, Nepal, South Africa, Uruguay.

Conditional

Cash for Work Argentina, Ethiopia, India, Korea, Malawi, South Africa.

Cash for Human Development Bangladesh, Brazil, Colombia, Ecuador, Honduras, Jamaica, Mexico, Nicaragua.

FEE WAIVERS FOR HEALTH AND EDUCATION Cambodia, Indonesia, Thailand, Zimbabwe.

NEAR CASH TRANSFERS Gambia, India, Sri Lanka, Malawi.

FOOD BASED TRANSFERS Afghanistan, Bangladesh, Ethiopia, Gambia, Liberia, Malawi.

INPUT GRANTS Bangladesh, Malawi.

COMMUNITY FUNDS Chad.

Source: Armando Barrientos and Rebecca Holmes, "Social Assistance in Developing Countries Database", Version 2.0, March 2006, IDS, University of Sussex, U.K.

Continuing along this line, the Education, Health and Food Programme (Progresa) is implemented in Mexico in 1997, and renamed in 2002 Human Development Opportunities Programme (hence forward Progresa-Oportunidades).

The same as similar programmes that were implemented in several Latin American countries, the CCT Programmes were also established throughout the region: in Brazil, there was the Bolsa Escola programme (BE); in Honduras, the

Programa de Asignación Familiar (PRAF) and in Nicaragua the one known as the Red de Protección Social (RPS)¹⁸.

The CCT Programmes are inserted into the conception of Milton Friedman (1912-2006), representative of the Second School of Chicago that began in the 1960's. For Friedman, if the State supports the poor, it should be done in cash to clearly establish what that is costing society. According to his defence of "freedom", he establishes that the most convenient recourse for "eradicating" poverty is charity, as long as it is voluntary and not obligatory¹⁹. Even if it were possible to accept, he says, the action of the State in such elimination to set up a minimum level of life for each member of the society, the "how much and how to do it" would be open to argument: a) if the objective is alleviating poverty, there must be a programme aiming at helping the poor ("helping the poor people as people") and b) such programme "should not deform the market or stop it from working if it must be established through the market"²⁰. He also suggests graduating the scale of subsidies and exemption duties to fix a minimum income below which no member of society will be found, after including the subsidy. That minimum will be set in relation with the financing capacity of the society, to clearly establish the cost to society for helping the poor.

Progres-Oportunidades geographically locates and grants monetary recourses to the target-families as well as certain services assuming that as poverty is inherited, this would be the way to break up the vicious circle of poverty (see Figure 1), moving on to virtuous circles where poverty will not be reproduced by generations. Its main

¹⁸See Villatoro, (May 2004: 9); De Ferranti, David, Guillermo E. Perry, et. al. (2004: 34) and Rawlings, Laura B. and Gloria M. Rubio (August 2003). Rawlings and Rubio explain in their introduction: "monetary conditioned transfers (CCT) are part of a new generation of development programs that seek to foster the accumulation of human capital amongst the youth as a mechanism to break up the inter-generational circle of poverty. According to the name, "conditioned monetary transfers provide money to the poor families on condition that it is invested in human capital, such as sending the children to school or taking them to the health centres regularly." Cfr. Introduction, p. 1 (translation VV). See also Villarespe (2008), Progres-Oportunidades: Alleviate or Eradicate Poverty, chapter of the book Ten Years, Balance and Perspectives of the Opportunities Programme, Universidad Autónoma de Nuevo León, in Print.

¹⁹ See Sugden (June 1982: 341).

²⁰ See Friedman (1966: 242-243).

goals can be summed up as follows: 1) improving food, health and education conditions especially those of the children and their mothers that will impact school performance and drop-outs; 2) supporting the family economy “procuring enough recourses for the children to complete their basic education”; 3) making all the family members co-responsible, participating in social welfare activities and 4) promoting community backing up and participation in the actions undertaken for the education and health services to benefit most families²¹.

Facing the differences between Solidaridad and Progres-Oportunidades, there are some similarities: transparency in the management and operation of recourses, easily audited programmes and co-responsibility as well as community participation in Progres²² and the community promotion committees in Oportunidades²³, as social supervisor of the programmes. The existence of a social supervising organ is due, according to our opinion, to the claims of the civil society and the various parties that play roles in the political Mexican scenery.

As can be easily assessed from all of the above, Progres-Oportunidades falls right within the second part of the scheme suggested by the World Bank (as noted before): better nourishment, education and health so that the underprivileged may profit from all the possibilities brought about by the economic growth, encouraged by

²¹ Cfr. Programa de Educación, Salud y Alimentación, Progres. Main characteristics and strategic guidelines (2000) in <http://www.sedesol.gob.mx/progres/texto.htm>, p. 8 (recovered on 15/06/2000).

²² See: Ismail, Immink, Mazar y Nantel (2005). Especially Annex 4, Mexico. Case study. “Development of local capacities. The participation of the community in the identification of a local follow up system is applied only to the fulfilment of the tasks given to the promoter when the latter is assembly elected by her community. Many of these promoters have been volunteers since the programme began working in their communities.”

²³ See: Diario Oficial de la Federación (February 28th 2007, Mexico) the Agreement issuing the operation Norms for the Programa de Desarrollo Humano Oportunidades, for the fiscal year 2007, especially section 4.1.3.1. of the Annex of this Agreement: “Conformation of Community Promotion Committees. These committees are organization requests by the head beneficiaries of the families they represent, integrated by members of the committees appointed by the heads of the families they represent. Such committees contribute to the establishment of a closer bond between the beneficiary families and the staff of the health and education centres and the National Coordination, to channel their concerns and suggestions and to strengthen the actions regarding nourishment, social public spending and the transparency of the Programme hence preserving at all times the freedom of the beneficiary families of direct speech with the operative and normative instances” Cfr. In http://www.oportunidades.gob.mx/htmls/Reglas_de_Operación_Oportunidades_2007_%20links_mayo_9.pdf, p. 6. (Recovered on 3/10/2007).

the thought of increasing the abilities of the poor in accordance with what has been claimed by Amartya Kumar Sen (1933-), Nobel Prize in Economics 1998 for his contributions to welfare economics. He referred to welfare economics as the general field of his work and separated out three particular areas: social choice, distribution, and poverty. He explains poverty as a serious deprivation of certain basic capabilities²⁴.

Neither Solidaridad nor Progres-Oportunidades can be assessed according to their incidence on poverty as a whole but to self-relation only, this is in relation to the increase or decrease of their covering, their works or their target-population. This, which seems less relevant, turns out to be of the utmost importance especially in the case of Progres-Oportunidades that has as a reference a poverty lines established in monetary terms and that, besides overcoming poverty: one of them is considered from income level at which food energy intake is just sufficient to meet pre-determined food energy requirements (food component of poverty) and the other poverty line is setting from consumption or expenditure in non food component²⁵.

Therefore, whatever success might be attributed to the Programme, even in what regards the objectives of the Millennium for poverty reduction²⁶ it is definitely questionable as the reduction of food component of poverty has a lot to do with the poor who overstepped the poverty line²⁷ but does not contemplate the new poor who have entered or enter this category unless the Programme widens its target-population.

²⁴ See Sen's Nobel Lecture, The Possibility of Social Choice, *The American Economic Review*, Vol. 89, No. 3 (Jun., 1999), in particular chapter IX Poverty and Famine.

²⁵ Food component of poverty: homes with insufficient income to cover feeding needs, equivalent to 15.4 and 20.9 pesos per person per day in the year 2000 in rural and urban areas each. Non food component of poverty: homes with insufficient income to cover the needs concerning food, education and health equivalent to 18.9 and 24.7 pesos per person per day in the year 2000 in rural and urban areas; and: homes with insufficient income to cover the needs concerning food, education, health, clothing, housing costs and public transport equivalent to 28.1 and 41.8 pesos per person per day in the year 2000 in rural and urban areas respectively.

²⁶ See: United Nations and Government of the Republic (2006) especially the pictures on pp. 14-18.

²⁷ The proportion of the population with lower incomes *per cápita* than one dollar per day was 3.2 for the year 2005. See *ibidem*, p. 25.

On the other hand, overstepping the category of food component of poverty does not mean that one is not poor anymore but that one enters another type of poverty (non food component)²⁸.

6. Development of abilities: the Sen vision

Progres-a-Oportunidad sets off from an integral approach in which the better the level of education, the better the health services, favouring hygiene and prevention: child and youth health are strongly felt in a better school performance, and a better nutritional state helps develop the people's abilities. These factors overlap each other and, in the long term, the official hypothesis is the change from the vicious circle of poverty into the virtuous circles of struggle against poverty.

From a merely subjective and individualistic point of view, it is stated, "surmounting the factors that lead to and perpetuate the condition of poverty, depends basically on the active co-responsibility of the beneficiary families and their communities"²⁹. Moreover, it has been contended that the Program does not discourage self-support and the amount of the monthly transfers is established accordingly³⁰.

Deep down, we found here the old argument of the XVII and XVIII centuries in England over whether the help given to the poor discouraged them from working, as if having a position in a job depended on them and not on external conditions beyond their control. In this sense, the debate was centred on the help-deserving underprivileged and on the undeserving ones as well: punishment for the one who would not work and bread for the one who could not do it.

²⁸ See De la Vega (2006) especially: Programme facing a discrepancy.

²⁹ <http://www.sedesol.gob.mx/progres-a/texto.htm>, already mentioned web page, p. 8 (Recovered on 15/06/2000).

³⁰ See: Scott, (July 1999) especially Picture 1 Components, services and conditionings, section 3.2. For Oportunidades, see Human Development Programme Oportunidades, monthly amounts corresponding to the second semester 2007, in the web page http://www.oportunidades.gob.mx/informaci3n_general/Semestre_2_2007.pdf (Recovered on 22/08/2007).

On the other hand, Mexican government institutions such as the Ministry of Social Development (Sedesol) and the Presidency of the Republic have stated that Progresa-Oportunidades is not a helping programme but a social politics instrument of human capital investment.

Sen suggests substituting income and profit for the idea of capacity; such proposal has given a theoretical and political turn to the theory of collective election and social welfare: the capacity represents the alternate combinations a person can be or do and/or the different ways to function that can be achieved³¹.

Special importance, morally and politically speaking, has been given to the – extremely urgent- satisfaction of a certain type of basic needs. Sen has used the term “basic capacities” to separate the ability to satisfy certain ways of crucial functioning to certain levels adequately minimal. The identification of acceptable minimum levels of certain basic capacities below those considered as suffering from scandalous privations, provides a certain focus on poverty: identifying the minimum combination of basic capacities is a good way to put forward the problem of diagnosing and measuring poverty.

Sen’s foresight states that the quality of life must be evaluated in relation with the capacity to achieve valuable performances. At the same time, human capacities constitute an important part of the individual freedom. The current struggle against poverty passes through establishing and selecting specific groups of people that are characterized for: being low consumers, malnutrition, poor education levels, unhealthy sanitary conditions, unstable participation in productive systems, discouragement of anaemic attitudes, low participation in mechanisms of social integration and adhesion to a range of values different from that of the rest of society. These groups will be the subjects of the programmes against poverty.

³¹ See Nussbaum and Sen, (1998: 67-69)

In this way, the programmes against poverty in Mexico, supported by the World Bank and by ECLAC³², such as Progres-Oportunidades, derive their philosophy and ruling action into increasing the capacities of the poor: food, health care and education, which will give the poor the right performance for a better quality life.

Anyway, it is worth reflecting whether the concept of poverty should be related to the poor people's interests only, to only those who are not poor or to both. From a partial point of view where the determinant principles of poverty are not considered, only the suffering of the poor that affects the well being of the rich is observed:

“People should not be allowed to become so poor as to offend or cause pain to the society. It is not so much the misery or suffering of the poor but the discomfort and the cost to the community what is really important for this conception of poverty. Poverty is a problem in what regards the problems created by the low incomes for those who are not poor. Living in poverty is sad, but offending or causing pain to the society against poverty is really tragic”³³.

But, should these consequences be incorporated into what is conceived as poverty, or only figure as possible effects derived from it?

Following Sen, the improvement of human condition is more than a fair humanitarian proposition for the next decade, a need to survive for all those, dispossessed and not dispossessed. The danger lies in the fact that an unstable political order may be constructed on the basis of perturbed societies as a result from extreme poverty³⁴. Many an effort has been made –and is made- to face poverty nowadays with specific programmes. Nevertheless, the leading purpose has not been to affect its determinants but to mitigate and alleviate it, its main objective being of a

³² See Luna (2006) especially chapter 1: interest in poverty and its concept nowadays.

³³ Sen (April 1992:310) From the text of Rein, Problems in the Definition and Measurement of Poverty, included en Townsend (1971: 46)

³⁴ See Dréze, Sen,& Hussein (1995), *op. cit.*

socio-political character: validation of the institutions acting to maintain the continuity of the economic process.

This is the reason why social and economic differences between countries, classes and individuals are increasingly emphasized, with and in spite of the gigantic scientific achievements, the necessary technology, the knowledge concerning the sources and the transformation of raw materials, the abilities and skills to satisfy the essential needs. It could be thought then that food, for instance, should be enough for everyone, but not everybody has access to it. Sen acknowledges that we have never failed as we did before and the persistent mass of the poor is part of the life of the XXI century as, we add, it has been for several centuries

7. The notion of human capital

Theodore W. Schultz (1902-1998) and Gary S. Becker (1930-, both Nobel Prizes in Economics, the first (together with Arthur Lewis, 1915-1990) in 1979 and the second in 1992, have been the main contemporary exponents of the theory of human capital.

For Schultz, as the majority of the people in the World are poor due to the low income they receive, “the investment in improving the quality of the population may increase significantly the economic perspectives and the welfare of the poor”³⁵; especially investments in health, child care, education and incrementing job experience through the acquisition of skills and abilities.

Becker, following this line of thinking, defines investment in human capital as “...the activities that influence future real income through the imbedding of recourses in people”³⁶; those investments affect, although in a different way, the income and consume, the amount on yielding and return and the perception of the relation

³⁵ Schultz (1985), *Investing on People*, Editorial Ariel, pp. 17-19.

³⁶ Becker (1983), *Human Capital*, Madrid: Editorial Alianza Universidad .Textos, p. 21.

between investment and yielding. They all improve the capacity, the knowledge and the health and, hence raising the monetary or physical income³⁷.

Two methods have been used to estimate what human beings are worth: the cost of production and the proceedings of capitalized income. The first is based on estimating real costs, such as net cost of maintenance incurred into upon “producing” a human being. The second one estimates the present value of the future incomes of an individual, such as net or gross costs of maintenance. It is thought then that raising and educating human beings has a real cost and that the investment in these beings, upon increasing their capacity, skills and abilities, will also increase their productivity, what *ceteris paribus* will reflect on the increase of the national wealth³⁸.

A strategic point in current programmes to defeat poverty is education, understood as better schooling that will allow the acquisition of skills and abilities, although the social benefits of a better-prepared population are quite evident:

“Education itself is not enough for the individuals to overcome the conditions of poverty they live in, seeing that if the market is not able to absorb that population, the individual although educated, will stay in that same state of poverty since his income will be insufficient to overcome such condition. In other words, one is poor because of lack of education and poorly educated because one is poor. Educating people is not enough to overcome poverty if there is no guaranty of a favourable macroeconomic surrounding especially in terms of employment”³⁹.

One of the main points mentioned in the programmes is health care. Nevertheless, we consider that it is not enough to persuade poor people to have

³⁷ Becker (October 1962: 31) “The ‘real’ income is the sum of the income in cash and the monetary equivalent to the psychological income. Most of the people seem to believe that the term “investment in human capital’ must be restricted to the monetary cost and yields. Allow me to emphasize that in essence, my whole analysis becomes useful, independently of the real income being subtracted or not from its monetary and psychological components. Hence, the analysis is applicable on health investment, an activity with a large psychological component or on the formation or training at work, an activity with an important monetary component”. (Translation VV).

³⁸ See Kiker (October 1966: 481-485).

³⁹See Aguado, Girón and Salazar (June 2007) mainly the debate in the chapter: The theory of human capital, p. 449.

greater medical care or to condition them to attend health clinics for preventive practices. This is of course quite important but, if there are neither minimal sanitary conditions in their localities or homes nor the corresponding services –such as drinking water or drainage-, keeping healthy is practically impossible. The same occurs with food: for example, Progres-Oportunidades gives to poor babies nutrient envelopes will never be enough if when growing up; their families lack enough income and the necessary information on the issue of the right diet.

Defining the skills and/or their acquisition as a capital is not relatively important; however, the distinction between the skills and the people is what really matters⁴⁰. Consequently, we consider that deeming a human being as the capital of what is invested in him and the expected return, is just considering him as one more factor in production, omitting the surroundings and the real conditions in which he lives.

The first sphere corresponds to the individual range and the second one to the social range. The theory of human capital is inserted within the neo liberal model that privileges the economic value of the individual in the market and his “free choice” to participate in the market law. On the contrary, conceiving the human being as a social being involves privileging the social outline where he lives and grows and that necessarily has an impact on the future. Besides, it implies the responsibility of the State as regards society cohesion and as the planner of the economic policy to conduct the society through including ways setting bounds to the supremacy of the market.

Therefore, in relation with the past, in the purest neo-liberal language, there is a substantial difference that does not look very significant in form but it is so in contents: the poor are not poor anymore, they are now human capital. Human capital

⁴⁰ Kiker (October 1966), “The historical roots of the concept of human capital”, op. cit.. p. 496. In this article, the author puts forward an interesting question: “...are the value of the skills and useful abilities and the value of the individual who possesses them worth the same? The skills and acquired abilities found in human beings are supposed to increase their quality as a production unity. Since those acquired skills and abilities are not transferable, talking about them only as a capital would be questionable. It has been suggested that the answer to the former question depends on the definition of the value”. Cfr. p. 488.

is classified as an asset the same as the physical (private and public) capital and social capital. In this case, human capital is a “movable asset”⁴¹. Assets, -current and fixed-, generate incomes and welfare according to the markets.

Epilogue

Despite being too obvious, we consider that the current programmes against poverty are institutionalised charity as the monetary help granted does not transform the conditions where poverty is originated and developed but they do show society the cost of such struggle.

Poverty is inherited and the vicious circle cannot turn into a virtuous one because poverty reproduces within the same system that generates it. Gary Becker himself, theorist of the human capital remarks that: “...for example, a person’s human capital is the sum of the inherited amount and the amount obtained through investments, moreover, the invested amount is particularly determined by the inheritance”⁴². The underprivileged usually come from poor families most of whom look down on education, in their hurry to have their children generating immediate income for the sustenance of the home. This means curbing the intergenerational social mobility, eliminating the possibility of their children joining the labour market with better salaries. Because of all of the above, it is necessary that the economic policy promote an effective and efficient inclusion in the labour market⁴³.

One last issue but nonetheless important, is the political use of the terms poverty cutback and exclusion. In the case of Mexico, Progres-Oportunidades is an income transfer programme that aims at eliminating or reducing the interchange (*trade off*) between income transfers for current consume and transfers that will allow

⁴¹ Levy & Rodríguez (2005). Without poverty inheritance: the Programme Progres-Oportunidades de México, México, Banco Interamericano de Desarrollo y Editorial Planeta, p. 138. See also p. 25 note 13: “On the other hand, the constant migration of a great part of the poor population, especially rural, also suggests the convenience to transfer incomes to strengthen their human capital which is a movable asset, instead of conditioning the transference to the possession of the fixed asset”.

⁴² Becker (November-December 1974: 1070).

⁴³ See Aguado, Girón & Salazar (June 2007: 452-460).

investments for larger consume in the future⁴⁴. The income transfers are considered as re-distributive instruments and consequently, needing economic-juridical guidelines that will support the redistribution⁴⁵.

Every argument to carry on the fiscal reform, the social security reform and the energetic reform as well, headed by the privatisation oil, spins around the transfers axis of income-redistribution. Progres-Oportunidades, it says the fight against poverty, becomes then the centre that unites the great neo liberal programme.

Actually, the Mexican government programme, Programa Nacional de Desarrollo (2007-2012), exposes like a main goal “a significant reduction in the number of Mexicans under scarce conditions with policies that will overcome the aid approach so that the people may acquire capacities and generate job opportunities”⁴⁶. Although in this objective it is explained that the aiding approach must be overcome with public policies (remember that even focalisation is conceived as public policy), it does not mean structural changes. Moreover, the reading we bear is that those policies are still related to income transfers via reforms, and the concept of the investment in human capital. Therefore, we think that the programme Oportunidades will remain in force.

⁴⁴ See Levy & Rodríguez (2005: 9-10 y 136-137).

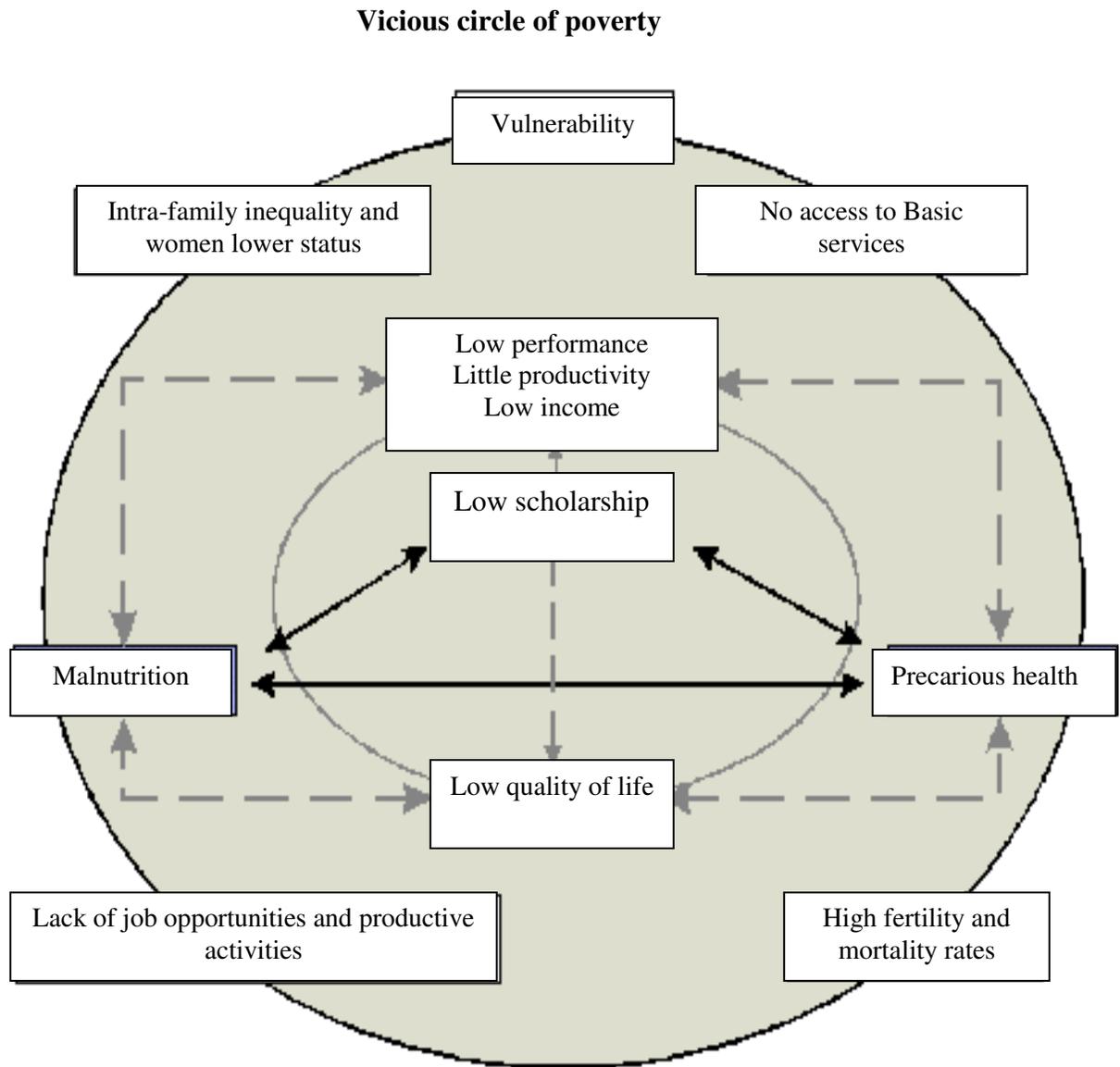
⁴⁵ See Secretaría de Hacienda y Crédito Público, in www.aplicaciones.hacienda.gob.mx/ucs/reformahacendaria/index.html (Recovered on 1/10/2007). Whereas in the initiatives of the Reform of the Tax System (for example, new fiscal federalism and quality of expenditure and profitability report) is marked to be necessary for the fight against poverty and exclusion. On the Social Security Reform, Levy in *Without Poverty Inheritance* (op. cit., pp. 11-12, note 8, chapter 1) declares “in December 1995, the Congress approved a law for the Social Security, in force since July 1st 1997. This Law reduced the contributions to social security of workers and businesses, increased those of the federal government and established public subsidies for some branches of social security offered by the Instituto Mexicano del Seguro Social (IMSS) and for individual saving accounts for the retirement of workers created in the same law. In other words, the law established income transferences to increase the current and future consume of the workers of the formal sector. For more detail, see op. cit., pp. 11-12, chapter 1, note 8.

⁴⁶ In the Programa Nacional de Desarrollo (2007-2012), in the chapter referring to Equal Basis of Opportunities, numeral 3.1 Overcoming Poverty, other objectives are pointed out: a) support to the most underprivileged helping raise their incomes and improve their life conditions encouraging and backing up the generation of family productive projects and b) reach to national territorial model that will stop the chaotic expansion of the cities, provide the adequate soil for urban development and facilitate the access to services and equipment in both, urban and rural communities. See page: <http://www.presidencia.gob.mx> (Recovered on 14/10/2007).

We reiterate then that the main issue, from our point of view, is that the programmes based on the income transfers, as the CCT Programmes do not transform the structures from which poverty is originated and reproduced. The programmes against poverty keep emerging alien to other spheres of the economic policy. The underprivileged are treated as if they were outside the production, distribution, interchange and consume, that is as if the poor were isolated from the system that procreates them instead of being immersed and living in it, the way they do. That is why the elaboration and execution of programmes against poverty within this system cannot get rid of it although they might significantly alleviate or diminish it. Poverty is functional to the system; hence poverty has not been nor can it be eradicated by any programme.

Figure 1

From a vicious circle of poverty to virtuous circles of struggles against poverty



Source: <http://www.sedesol.gob.mx/progresatexto.htm> (Recovered on 15-06-2000).

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