

Chapter 24

Mexico: Poverty as Politics and Academic Disciplines

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This chapter refers to some of the major contributions to poverty research in Mexico in the period 1982–94. As elsewhere in the Third World, poverty research in Mexico has developed in close, sometimes conflicting relation to various forms of state action. As such, most efforts in the field attempt not only to gauge the changing nature and extent of poverty, but also to evaluate state action and to propose policy reform. Research interacts in multiple ways with government policy. Researchers have developed their analyses in a field in which sides are always to some extent political but not always clear cut. There is a multiplicity of positions both within and without the public sector, and collaboration has at times involved opposing theoretical positions. There are some fundamental agreements as well as large differences in the particular biases, sources, methods, and conclusions of the major studies undertaken since 1982. Their common concern, however, is with the process of restructuring affecting Mexico since 1982, and its interaction with poverty.

This common concern is subject, however, to diverse approaches. During the 1980s and early 1990s, national-oriented research based on official figures was usually more prominent than micro-social studies. The first incorporated international quantitative indexes, assessed national trends, and developed original indexes for the measurement of poverty. Micro-social studies, on the other hand, have typically been based on their own regional or local data sets and tend to view the organization, agency, and strategies of the poor, their households, and small-scale enterprises as responding, even modifying, to some extent, the outcome of adjustment and restructuring. For the first type of research, these responses, if at all significant, represent a form of adaptation to existing, given circumstances. For the second, the

actions and reactions of the poor are significant in making their livelihood possible, and may impact on the national economic structure. In this sense, the forms in which the poor adapt are not fatal outcomes of macroeconomic developments, but creative solutions to hardship (Escobar and González 1995). Whereas macro-studies lack some of the necessary data to evaluate people's actions and responses, the second often face difficulties of generalization or comparability. There are, however, more meeting points to these approaches than is usually recognized, and bridges have begun to form between them (Cortés forthcoming; García and Oliveira 1994). Both have at times led to simplistic readings and exaggeration: micro-sociological and anthropological studies have been used by policy makers to assert that the poor will make do during restructuring, because there is a "culture of poverty" that teaches them to do so. To some economists engaged in national studies, on the other hand, the focus is on paid employment, which serves to gauge the capacity of the economy to absorb the population in gainful occupations. Clearly, the poor cannot always "get by". If they did there would be no need for a social policy towards the poor. On the other hand, self-employment and unpaid employment matter for a sociological analysis of work, employment, and poverty.

Concepts

The political nature of poverty research is partly responsible for the definition of concepts and measurements developed in the literature. There is a growing number of macro-social studies attempting to provide adequate measurements of poverty (poverty lines, enumeration and aggregation of the poor, income gaps and inequality among the poor). The general aspects of these studies are coined in the mould of internationally accepted concepts of poverty, the most salient of which is the definition of a "poverty line" or, most commonly (Boltvinik 1994; ECLAC-INEGI 1993a,b; COPLAMAR 1983, 1985; Levy 1992) two poverty lines, one defining extreme poverty and another defining absolute, moderate, or relative poverty. But some of these and other analyses (Cortés 1994; Hernández Laos 1992; Levy 1992) calculate other indices developed in the international literature (Sen's various indices, Foster-Greer-Thorbecke's index, Gini's index). Lastly, there are new conceptual and analytical proposals, based on original measurements and indices, most notably Boltvinik's (1992) Integral Measurement of Poverty.

Micro-social studies of poverty define their subject on the basis of a seemingly less strict definition of the poor: there are studies of low-income households that may at times lie above a "poverty line" (González de la Rocha 1986, 1994; Tuirán 1993). There are studies of female-headed households, which are particularly prone to poverty (Chant 1991). Some authors have focused on small enterprises as the basis of subsistence of a large number of poor families (Bueno 1990; Cortés and Rubalcava 1991; Escobar 1988, 1990). Others have devoted their attention to the interaction between families living in irregular settlements and various state programmes, forms of state action, and the political apparatus. These studies also attempt to establish varying levels of welfare for individuals, families, neighbourhoods, and enterprises and to explain their observed differences, but their common interest lies rather in exploring the mechanisms implemented by the poor that make their survival viable. To do so, they depict and explain various patterns of resource allocation and analyse the extent to which household divisions of labour and the various forms of work and work relations lead to some generation of wealth, income, and employment and they pinpoint social-structural factors that make them stay poor or prosper modestly. Some macro-social studies, such as the latest efforts by García and Oliveira (1994), Cortés (1994), and Gordillo (1994), also belong in this group. Although they use large-scale, primary or secondary national official data, they too focus mainly on the actions, reactions, and strategies of the poor in urban or rural settings during restructuring, and at times resort to a dual micro-macro approach.

The point of departure for large-scale studies of poverty during the 1980s and 1990s has been the project undertaken by COPLAMAR (Coordinación Nacional del Plan Nacional de Zonas Deprimidas y Grupos Marginados) at the beginning of the 1980s. This government-sponsored study involved a prominent team of researchers, and its basic aim was to define "social development" policies in the context of relative government affluence. To do so, large data sets were collected and most basic pertinent concepts were redefined or re-operationalized. Extreme poverty was defined as an *income level below the cost of a food basket containing a set level of calories*. After an examination of a number of alternative food baskets that provide this calorie intake, the researchers chose as reference the one based on the food consumption patterns of the seventh decile of the Mexican income distribution structure. Admittedly, it was not the cheapest possible, but it was "real", in the sense that it represented actual consumption patterns in rural and urban

Mexico. A relatively expensive food basket was thus defined, costing 36 per cent more than the minimum possible (Levy 1992). This obviously raised the extreme poverty line and the number of the extreme poor. Researchers justified their choice as one that represented actual consumption patterns and also because the population with incomes below the cost of this basket did not as a rule replace these items with suitable but cheaper food, but were instead undernourished. This was the fundamental object of the study, and this definition of extreme poverty became the key to another research task: the identification of regions within which large proportions of the population earned incomes below this extreme poverty line. These areas were called "marginalized zones", not poor zones, partly because extreme poverty was mostly found in isolated rural areas that lacked jobs and health and educational services. For two or three years, these regions did receive special attention from COPLAMAR. Although the programme subsisted formally, it was somewhat swiftly put into hibernation with the new government, which had to manage a major crisis. Nevertheless, COPLAMAR had a significant impact on federal expenditure. From 1982, states containing many or deeply marginalized zones were in fact privileged by federal expenditure: their participation in federal allotments (*participaciones*) rose faster than their participation in GNP, at times even more rapidly than that of states rapidly gaining population and production (Escobar 1995).

For COPLAMAR, the definition of moderate poverty was much less important, and not a prime object for policy. The demarcation of this line also turned out to be less useful. It also took as reference the patterns of consumption of the seventh decile of the Mexican income distribution, but it included in addition all non-food items of consumption and access to services. These consumption patterns served to construct a "normative basket satisfying essential needs" (CNSE), which comprised a considerable diversity of goods and services, notably housing expenses, domestic appliances, transport, clothes and shoes, education, health care, and recreation (Coplamar 1983; Boltvink, 1987). Although a diversity of goods and services should unquestionably form part of the definition of poverty, this particular "endogenous" approach to its definition represented a *petitio principii*. It provided neither an evaluation of welfare that accounted for the satisfaction or not of all basic needs, nor an indication of what the welfare shortfall would be when some of those goods and services were inadequate or absent, except via an equivalent income level, which in turn automatically defined 65 per cent of the Mexican population as below this line for the

baseline year (1977). Hernández Laos (1992) and others have noted this problem. "Moderate" poverty is conceived in this study as absolute (in terms of this given CNSE), but it also possesses a "relative" aspect: it should identify a segment of the population that receives roughly adequate food and most basic services, *but* does not have access to other goods and services deemed necessary to participate in the production of national development and in the enjoyment of its benefits. As Levy (1992) notes, the consumption patterns of the reference (seventh) decile included – in some of the households – washing and drying machines. It can easily be said that these households were under neither absolute nor relative deprivation, except in comparison with the unquestionably well-off. Later studies discarded this definition, and it had no major effect on policy. Later efforts, most notably Boltvinik's Integrated Measurement of Poverty (detailed below), currently attempt to overcome this concept's deficiencies by means of the provision of a composite index that incorporates a large number of needs whose non-satisfaction can be measured precisely in order to define a global household income gap in relation to a predefined poverty line, independently of a reference group.

During adjustment and restructuring, poverty as a concept gained in public and academic relevance. In 1982, a devaluation of the peso to one-quarter of its US dollar value, coupled with inflation and the stagnation of employment, led to a precipitous rise in poverty levels. In 1986, the sale of state-owned firms was stepped up, Mexico entered the General Agreement on Tariffs and Trade, and at the end of 1987 the first of a series of "pacts" was signed by representatives of major sectors of organized society. This entailed a shock programme of economic reform, which included a prices and incomes policy agreement between the government, employers, peasants, farmers, and worker confederations. In 1988, the government launched its *Solidarity* programme, heralded in Mexico and elsewhere as a model for the struggle against poverty. At the same time, the government's general economic policies adversely affected GNP and individual incomes.

The government carried out household income and expenditure surveys (ENIGH) in 1977, 1984, 1989, and 1992, and a number of analysts base their analyses on them, whether through published tabulations (Boltvinik 1994; Cortés and Rubalcava 1995, Hernández Laos 1992) or through analyses of the corresponding microdata sets (Cortés 1994; Levy 1992). A growing group of academics is interested in the evolution of poverty under restructuring. INEGI, the official census and statistical

agency, increases the variety and number of tabulations produced from the survey, and carries out its own analysis of the evolution of poverty, with the endorsement of the UN's Economic Commission for Latin America and the Caribbean (ECLAC; ECLAC/INEGI 1993a,b). Until 1992, however, only the 1984 household survey was available in microdata form to academics. This limited their analyses. Starting in 1993, the microdata from the 1989 and 1992 surveys became available, first very selectively and later to all interested. This unprecedented openness has allowed analysts to pinpoint the shortcomings and biases underlying the government's official position. Although this has naturally led to substantive criticism, it has also fostered a basic agreement on a conceptual groundwork for analysis. A number of analyses define both extreme and moderate poverty and the Gini index of the income distribution structure as a condition for various evaluations of the social implications of the economic crisis. Their research results, however, do not necessarily coincide, either for a given year or for a defined period (Boltvinik 1987; ECLAC/INEGI 1994; Cortés 1994).

Different and contradictory results stem from (a) differing assessments of minimum dietary components and the basic food basket, (b) the composition, size, and value of non-dietary goods and services defining poverty, (c) income adjustments due to inflation, to mismatches between ENIGH and national accounts, and to the monetary equivalent of non-monetary income, and, finally, (d) other indexes defining poverty. These differences are partly conceptual and partly technical and methodological.

The income level required to purchase a minimum food basket has been adjusted in Latin America as a consequence of new estimates of the level of calorie intake required by the population of each country. In Mexico, mean energy needs indexes, as defined by ECLAC/UNDP (1992: 340), fell between 1970 and 1980. In 1970, total energy requirements were set at 2,285 kcal daily and in 1980 at 2,139. High-quality protein needs have, on the contrary, risen from 28.6 to 34.8 grams daily. The drop in total energy requirements resulted from adjustments based on (a) the average national height for men and women, which had been calculated on the assumption of equal average heights throughout Latin America for 1970, and (b) lower energy needs for infants, children, and adolescents. This calorie requirement, however, is higher than that estimated by some authors, who have established minimum requirements closer to 2,000 kcal daily. ECLAC/INEGI (1993b) provides a detailed account of

calorie and protein requirements according to age, sex, and rural/urban status.

An income-defined food basket is useful but problematic. It cannot be assumed that people with earnings approaching that cost will in fact consume that basket. This problem may be greater in some regions and countries. In Mexico in 1979, the National Nutrition Institute estimated, on the basis of a nationwide health survey, that 19 million Mexicans, 13 million of whom lived in rural areas, were undernourished. This represented a larger proportion of the population (28.4 per cent) than in other Latin American countries with average incomes below those in Mexico (Lustig 1992). This means that, in order to identify the extreme poor in nutritional terms in Mexico, it is necessary to add a substantial amount to the cost of the food basket. This is in fact the approach used by some authors (Levy 1992), although they have been criticized and the size and method of estimation of this non-dietary component vary from one analyst to another (Hernández Laos 1992).

Internationally used indexes will not be dealt with in detail. Instead, particular attention will be given to Boltvinik's Integral Measurement of Poverty (1992). This index is currently being tested on a specially designed survey in Mexico City, and it is being adapted to analyse other databases. Its fundamental aim is to combine the advantages of the two complementary approaches for the enumeration and aggregation of poverty: those based on an income-based poverty line and those based on an estimation of the satisfaction of basic, or essential, needs. This is not the first attempt to provide such an index. But it is a new approach to an integrated index. Boltvinik proceeds by identifying and weighting aggregate need satisfaction in order to produce all of Sen's indexes. The components for a measurement of need satisfaction are: running water and sewerage, education level and school attendance, electricity, housing, household equipment, and free time. The components of the income-based poverty line are: food, dress, shoes and personal care items, hygiene, essential transport and communications. Among the latter, however, Boltvinik also incorporates the costs involved in the access or acquisition of services required for the satisfaction of essential needs. Health needs, for example, may be satisfied either through social programmes or through private institutions. In some cases, then, they should be identified basically among the first set of indexes, but in others they should be accounted for mostly through the second set. In both instances, however, the cost of accessing the institutions in order actually to

receive these services should also be accounted for. This involves both time and money, and Boltvinik pays particular attention to the incorporation of time as an aspect of general deprivation and poverty.

To obviate the limitations of need-non-satisfaction indexes in which non-satisfaction increases with the number of needs established, and deprivation is seen simply as 0 or 1, Boltvinik computes a continuous variable for each need, and estimates the satisfaction of each need into an index in which the distance separating the household from the satisfaction of each need is aggregated. The resulting index varies from +1 (complete deprivation of every need) to -1, after rescaling each need, in order to normalize the distribution and withdraw the effect of improvements that have negligible effects on need satisfaction, for example less than one person per room. Households at the norm (those whose average of satisfaction is equal to the norm) therefore have a value 0. Households can be classified into three groups: those with all their needs unsatisfied, those with all needs satisfied, and those with mixed satisfaction of needs. Boltvinik proposes to use a range of 0.1 to -0.1 to define mixed households on the *threshold* of poverty. Other mixed households, if their average departed more significantly from the norm, could be allotted less equivocally to groups above and below. The problem of the time necessary to fulfil some of the needs is met by adding another weighting factor, rather than by computing income lost in securing those services.

After weighting the importance of the non-satisfaction of each need *according to the general profile of need satisfaction of each country* (or region), Boltvinik arrives at a poverty line. He then proceeds to aggregate the distance to this line for every individual below it, which produces a measure of the intensity of poverty. From this, he computes what he calls a "Sen poverty index based on the non-satisfaction of basic needs", which is sensitive to inequality of need non-satisfaction among the poor.

Lastly, Boltvinik incorporates income and time availability (time worked beyond the norm, children's work-time, and time devoted to the satisfaction of non-income-related needs) into his index. This is important because the reason most poor households cannot satisfy their education, health, and other needs is the extra amount of time they have to devote to work and to the satisfaction of other more essential needs, such as clean water and fuel for the household. Therefore, households above the extreme poverty line that are forced to devote a large amount of extra working time to securing that income are classified as extreme poor according to his index, because, as is known, extra

work-time bars them from schooling their children or from overcoming the education gap of the adults. Boltvinik's method for an integral measurement of poverty calls for the improvement or development of new databases. A large local (Mexico City) survey especially designed to calculate these indexes has however been carried out, and its results are currently under preparation.

Other concepts that have been subject to considerable research and debate in Mexico have to do with the household and with individual and household cycles and their impact on well-being and poverty. A pioneering effort in this regard was carried out by García et al. (1982), who analysed the relevance of the household and the household cycle among the working class in Mexico City. Social anthropologists had traditionally based their analysis of the peasantry on the household. This explains why, once they turned their attention to the cities, they did a large amount of household-based research. This is the case of González de la Rocha's research in Guadalajara (1986, 1994), which stated that the basic social unit acting to ensure the survival of the poor is the household. Although official sources collect information on households, Selby et al. (1990), Chant (1991), and González de la Rocha (1986, 1994) place considerably more emphasis on the household as a crucial unit in individual and collective decision-making by the poor. According to them, household dynamics lie at the basis of the reproduction of urban poverty. González de la Rocha places special emphasis on the household cycle. Stratification of poor urban households according to their per capita income is closely related to the stage of the household cycle. As this cycle progresses, the number of household workers changes, and so do their occupations. Welfare and per capita incomes, therefore, vary quite substantially along this cycle, and the local working class cannot be divided into strata that remain above or below. This variation does not change poor households into middle-class or affluent households: at times their income may match or exceed that of non-manual workers, but their patterns of survival and reproduction usually entail the reproduction of their condition as an urban working class. González de la Rocha views the working class as a single social aggregate, with internal differences explained mostly by the availability of workers in the household.

Similarly, the work of Escobar (1986) showed that Guadalajara workers crossed the boundaries between formal and informal work and enterprises during their working lives, and that this crossing was patterned on their life cycles. This meant, according to him, that there were no separate formal and informal working

classes, but rather a single working class, moving from one type of workplace and work relations to another. The two concepts used (household and life cycles) matter for an evaluation of urban poverty, because jobs, income levels, and need satisfaction are dependent upon the individual and the household cycles. Although the use of these concepts has been criticized by academics using a life-course perspective, the notion that household stages and the phases of the life cycle matter for an analysis of poverty and well-being is now widespread in Mexico.

Hypotheses and theoretical frameworks

Whether from a critical or a "collaborative" standpoint, it is recognized that adjustment and restructuring are changing the levels of poverty and the pattern of income distribution. Debate in Mexico does not in general question the need for economic reform, although the direction of reform is the subject of wide discussion. It is centred instead on whether these changes are resulting in increased or lessened poverty and on whether "short-term" increases in poverty will be reversed in the medium to long term, when and if Mexican restructuring succeeds. The government's position can be summarized as follows: (a) although restructuring depresses wages, the poor find creative ways to counteract lessened employment and pay, with informal work compensating to some extent for the downfall; (b) the depression of incomes is short lived; (c) by 1992, incomes had increased, with poverty and inequality dropping. This position finds support in the official publication discussed above (ECLAC/INEGI 1993a, b). Most independent efforts do not explicitly reject this position by means of a contrary set of hypotheses. They tend instead to "deconstruct" official findings and to show contrary results. These can, however, be stated as a hypothetical construct stating that poverty has increased. This is due to a sharp short-term decline in GNP (1982-84) and a consistent, long-term fall in real wages and in the participation of wage income in the national economy, owing to falling salaries (main cause) and the stagnation of formal employment (secondary cause). Informal employment has led to a rise in household income from non-wage sources, mostly self-employment. This rise, however, by no means offsets the fall in wages. The falling participation of wage income is concomitant with a rise in profit and rent income, which has also led to an increase in socioeconomic inequality. The mediate cause of these changes lies, according to these analysts, in the specific policies of adjustment and restructuring implemented in Mexico.

Other hypothetical statements concern the role of added work or effort on the part of the working classes and the poor in general. A group of anthropologists, socio-demographers, and human geographers have focused on the household as the significant social unit defining the amount of extra work performed by individuals, as well as who, in a household, is "assigned" to paid work, market-oriented unpaid work, and housework (Chant 1991; González de la Rocha 1988, 1990, 1994; González de la Rocha and Escobar 1986; Selby et al. 1990). To some (González de la Rocha, Escobar, Tuirán, Cortés), additional work is countercyclical: the economically active population (EAP) tends to grow under crisis and restructuring. To others (Boltvinik), the EAP is procyclical: it grows and falls with the economy. Although support for either of these theses really depends on the definition of the EAP (on the inclusion of the underemployed, the self-employed, and unpaid workers) and on the data sources (censuses vs. employment surveys, which show contrary trends), what matters, in my opinion, is (1) whether or not increased effort on the part of the poor lessens poverty and inequality (see the Major Results section below) and (2) whether it creates wealth or merely redistributes a given GNP among underproductive, immiserated workers. This discussion attempts to establish the nature of informal work during restructuring, which is related to various approaches to informality. The approach closest to most Latin American governments since the mid-1970s is derived from the classic International Labour Organization (ILO) formulation, according to which most informal activities are easy entry, low capital, small scale, underproductive, and therefore providing low income. This approach does not see formal-informal exchanges as significant. According to De Soto (1987), the poor are economic actors who would generate wealth were it not for a repressive, "mercantilist" state. The emphasis here is on the political, not the economic, constraints. If the poor's shops and micro-businesses were allowed to operate freely, they would invest more, pay better wages, and become a pillar of development.

For others the informal economy is a product of the particular political economy of peripheral capitalism, and the wealth it generates is appropriated by the formal economy. In a crisis of the formal economy, the informal economy will suffer too, because demand from the formal economy drops (Portes et al. 1994). This is, admittedly, a simplification: these approaches could be compatible with different outcomes, depending on whether the state and the capitalist sector increase or decrease their exploitation of informal work with restructuring. For

example, capitalist firms may attempt to increase their market share and decrease their investment levels and labour costs by resorting to more subcontracting, which would lead to a growth of informality and informal work. Formal employers, also, may be happy to allow informal goods and services to form the basis of the subsistence of their workers if this results in lower wage demands in their own firms. As has been noted, this is counter-productive in a fairly closed economy (because it reduces aggregate demand for the goods of formal firms) but makes sense both for individual firms and for an open economy. But the opposite may also be true. Formal employers may try to maximize their use of existing capital stocks by increasing in-shop production. State action may also affect informal work: the government could become more lenient towards informal work for economic, political, and social reasons, or it may try to compensate for revenue problems by increasing or developing new forms of taxation reaching otherwise illegal enterprises.

These two theoretical frameworks are based on the *posited* relevance of the articulation of the state, the capitalist economy, and informal work. However, because both society and economy are undergoing restructuring, the nature of informality since 1982 in Mexico is open to question, since restructuring could affect precisely this articulation. In other words, a political economy approach could be consistent with a rise in a productive informal sector during restructuring and not only, as Portes et al. (1994) assert, with a decrease in this sector as a consequence of falling formal demand for their goods and services.

Studies of gender and poverty, lastly, explore two main problems: first, to what extent and in what ways gender segregation and discrimination in the labour market produce greater levels of poverty among women; second, the various interactions between women's household roles and power positions and poverty. Because gender has in fact been shown to make a very significant difference for poverty, whether through the inequality of poverty within a household or via labour market discrimination, it has become widely incorporated into the discussion, but mainly into the discussion most interested in the logic of the making and reproduction of poverty. Thus, analyses based mostly on aggregate, secondary data sources tend to complement gender analyses of those sources with in-depth interviews and case studies (García and Oliveira 1994), while micro-sociological studies likewise resort to aggregate figures to buttress their findings within households and workplaces (González de la Rocha, Chant). There is now general agreement on the existence of a particular approach that may be called a "gender

perspective", although what exactly constitutes this perspective is far from agreed.

Data sources

The large-scale studies depicted above have one major common source: the national household income and expenditure survey (ENIGH), which has been carried out at intervals of between three and seven years during the past forty years. This survey is national in scope. Although INEGI maintains that its validity is for the national level of aggregation only, it is carried out in every state (Mexico comprises thirty-two states and a Federal District), and currently it is being tested for consistency and fit with census data at the state level. This implies aggregating the forty categories of household expenditure into a smaller number, because the forty are valid only for the national sample. Micro-data analysis of the 1984 survey (Levy 1992), however, shows that, in spite of a relatively large sample size (19,000 households, 65 per cent urban and 35 per cent rural), rural sub-samples are extremely small and even nil in some states.¹ This implies that state-by-state analysis of the rural sub-samples is not always possible. In addition, the number of households in the survey has systematically dropped since 1984. The 1992 sample consisted 10,000 households, 57 per cent urban and 43 per cent rural (ECLAC/INEGI 1993b). The proportion of rural households in the latter sample is higher, and rural coverage seems to have improved. However, this raises comparability problems that may or may not be counteracted by weighting procedures (see the Major Results section below). The (long and detailed) questionnaire explores: dwelling and basic services; main and secondary occupations for those aged 12 and over; credit card use; actual consumption of food, alcohol, and tobacco, including consumption of self-produced food; gifts received and payment in kind of food; transport expenses; business income; agriculture, husbandry, and forestry expenses and production; housework; personal expenses; education; culture and recreation; communication and vehicle servicing; dwelling expenses; consumption of non-food items; gifts received and payment in kind (later translated into their income equivalent); clothing, shoes, and accessories; domestic equipment; health care; recreational goods; and capital increases, earnings, withdrawals, and losses.

Deriving national income from this survey is not automatic. Owing to differential under-reporting (capital earnings are particularly under-reported and such households under-sampled,

and non-monetary income is under-reported by poor households) its results do not match national accounts. A number of analysts (Boltvinik 1994; Cortés 1994; Hernández Laos 1992) correct for under-reporting in the survey by means of income/expenditure adjustments based on the "System of National Accounts". Other analysts do not carry out this adjustment, and this operation alone is responsible for some differences in their outcomes. Income and expenditure under-reporting in the ENIGH seems to be a major problem: even the 1990 population census, which asked only one income question, reported 1 per cent more GNP than ENIGH. The usual assumption (that under-reporting is not a major obstacle as long as it can be assumed to be roughly constant) does not hold, because households in Mexico have changed their income sources significantly during the past thirteen years.

Also, the fortunes of a small number of Mexican dollar billionaires have increased considerably (*Forbes magazine* reported twenty-four of them in 1994). Their aggregate income was estimated as equivalent to the income of the poorest 25 million Mexicans.² It is obvious that none of these families formed part of the survey, or, if they did, they grossly under-reported their income. If income concentration estimations could be based on a sample containing an adequate number of households in *pre-defined* income brackets, the survey would report a remarkable rise in the concentration of income (but only if it could be comparable to previous ENIGHS).

Additionally, the survey calculates a rent income equivalent to every owner-occupier household. Although this seems common sense, the scarcity and high cost of capital, together with high inflation rates in Mexico during the 1980s, meant that rental housing costs rose faster than inflation. Also, more than half of Mexico's poor are owner-occupiers. Adding a rent equivalent thus meant that the total income reported for the sample, and particularly for poor owner-occupied households, grew far more than money income. If the rent equivalent is subtracted or reduced to an index equal to the change in the real value of housing, *total income drops perceptibly for Mexico's poor*, and income concentration grows simultaneously (Boltvinik 1994).

Lastly, the survey pays close attention to gifts received. During prolonged economic hardship, some of the poor increase their gift exchanges. Because the survey reports only gifts received, this results in a net non-monetary income increase for Mexican households. But, because the survey does not report gifts given to others, it is impossible to estimate expenditures thus incurred. This produces an optimistic bias in income

assessments *as restructuring progresses* (Boltvinik 1994). Some analysts typically subtract gift income from their studies of *trends in poverty* (ibid. Cortés 1994). If analysis disregards gifts received, the incidence and intensity of Mexican poverty, as well as income concentration, rise.

A number of other data sources are regularly employed by macro-poverty analysts. These include national population censuses, employment surveys (ENEU, ENE, Encuesta Industrial Mensual), and economic surveys of production and employment. The last two are regularly included in the government's "System of National Accounts", whose main concern is providing adequate economic information. The first source, the national population censuses of 1980 and 1990, provides a good basis on which to evaluate the findings of ENIGH and the employment surveys. The censuses are subject, however, to mutually inconsistent biases that make changes very hard to establish. Most census-using scholars agree that the 1980 census significantly over-enumerated the economically active population and that the 1990 census significantly under-enumerated the EAP – particularly women's work. Matching census results to the quarterly employment survey (ENEU) is impossible, except in one regard: the number of *waged* occupations. Whereas the surveys report large increases in the numbers and proportions of self-employed and unpaid family workers, the 1990 census reports a relative drop in both, compared with 1980. For this reason, some analysts prefer to use the results of national employment surveys as a basis for studying trends in work-derived income during the 1980s. An obstacle to this is that quarterly surveys are carried out only in the main thirty-seven cities, with national (rural-inclusive) surveys carried out at variable intervals of two to four years. Others have decided to use census results at their face value (Boltvinik 1994) in view of the match just described. This has consequences for their results.

Micro-sociological analysts use a variety of other sources for their analyses. Individual and household histories, migration, values and attitudes, internal power arrangements and organization are all integrated into questionnaires and case studies, which can therefore relate employment, income, poverty, and interaction to government programmes. In 1982, González de la Rocha carried out fourteen family case studies that served to define the issues and categories for a survey of 100 poor families. In 1985 she re-interviewed sixty-eight households in her initial sample and replaced those not found with households containing main workers in the same industries as those lost, only younger, to compensate for the sample's ageing. She followed the same

strategy again in 1987. Chant (1991) has also systematically returned to the households she studied during the 1980s in three Mexican cities. The National Consumer Institute, on the other hand, began a panel survey of household structure, income, and expenditure in 1985 in Mexico City and later extended it to other cities.

Major results

Most analysts agree that poverty and extreme poverty dropped as a percentage of total households and total population during 1957–77. Those analysing income inequality, however, point out that the lowest decile of the Mexican income structure consistently lost ground, relatively speaking, during the period. Whereas in 1957 it captured 2.4 per cent of GNP, in 1977 it received only 1.1 per cent of GNP. This is nevertheless consistent with a systematic improvement in their income levels, granted that economic growth was high and constant throughout the period (Escobar and González de la Rocha 1995; Reyes Heróles 1985; Tello 1991). More significant differences appear when restructuring is analysed, however.

Analysts of the 1977 and 1984 ENIGH, as well as other data from that time, agree on several major points. There is virtually no disagreement on rural poverty. Both COPLAMAR, using 1977 data, and Levy, using 1984 data, agree. Levy (1992: 44–48) characterizes the major traits of poverty in Mexico in 1984 as follows:

- between 10.0 per cent and 19.5 per cent of the Mexican population can be considered as extremely poor;
- they are mostly located in rural areas
- the poorest among these are even more heavily rural;
- the extreme poor have large families, a greater proportion of children in the household, greater dependency ratios, and lower schooling;
- not even the extreme poor devote more than 60 per cent of their income to food;
- most of them work in agriculture; and
- those in urban areas are better off independently of income, in spite of similarities regarding household composition, expenditure, and schooling levels.

The results from several major studies of the 1984 ENIGH are summarized in Table 24.1. As mentioned before, differences result from (a) the definition of dietary intakes, (b) the amount

Table 24.1 Mexico: absolute rates of poverty according to various sources, 1984 (% of population)

	ECLAC1	ECLAC2	SPP/ILO/ UNDP ^a	Hernández Laos	Levy
<i>Extreme poverty</i>					
Rural	30.0	24.0	19.5	52.9	37.2
Urban	19.0	8.0	4.9	20.0	10.0
National	22.0	13.0	8.7	29.9	19.5
<i>Poverty^b</i>					
Rural	61.0	51.0	54.2	76.1	96.7
Urban	47.0	30.0	15.2	49.6	72.8
National	51.0	37.0	24.7	58.5	81.2

Source: Hernández Laos (1992), abridged by the author. ECLAC2 was adjusted to match national accounts.

Notes:

^aJoint research by the Ministry of the Budget and Planning, the International Labour Organization, and the United Nations Development Programme.

^bIncludes extreme and moderate or absolute poverty.

and nature of non-dietary goods and services and their income equivalent, and (c) adjustments made, whether for inflation or to correct mismatches with national accounts. All use income levels to estimate the population's ability to purchase a given food basket, and some add certain amounts to this basket to allow for other basic goods and services. Relative to the lowest estimate of a poverty line (SPP/ILO/UNDP), the others apply income levels 70 per cent above this mark (ECLAC), 319 per cent above (Hernández Laos), and 43 per cent above (Levy 1992). These differences are then compounded or lessened by adjustment to national accounts (Hernández Laos 1992).³

As can be seen, there are large differences among the studies, although they agree on the rural nature of poverty for 1984. Most of them could be used as a basis for a poverty alleviation programme, except perhaps for the lowest estimation, which would leave out of the programme a large number of undernourished, unschooled children and adults. COPLAMAR and other sources have produced reliable figures that indicate that the proportions of undernourished, unschooled children and adults are considerably larger than the number of extreme poor estimated by SPP/ILO/UNDP.

Differences among the studies widen during the period of crisis and restructuring. The studies differ not only on the definition of levels of poverty but also on the nature of the trends found.

Table 24.2 Mexico: Official estimates of the evolution of poverty, 1984-92

	1984		1989		1992	
	Million	%	Million	%	Million	%
Individuals in extreme poverty	11.0	15.4	14.9	18.8	13.6	18.1
Households in extreme poverty	1.6	11.4	2.3	14.1	2.1	11.8
Poor individuals ^a	30.4	42.5	37.8	47.7	37.2	44.0
Poor households ^a	4.7	34.2	6.3	39.4	6.4	35.9

Source: ECLAC/INEGI (1993b: 110-11).

Note:

^aPoor = extreme poor + "intermediate poor".

Official estimates on the basis of ENIGH on the extent of extreme and "intermediate" poverty for 1984, 1989, and 1992 point to a rapid increase in the incidence of both kinds of poverty from 1984 to 1989 and a later slight decline (Table 24.2).

Boltvinik, Cortés, Rubalcava, and others challenge these findings. Boltvinik (1994) provides the most thorough macro-sociological analysis of poverty. He first uses national economic statistics to conclude that wages and waged employment dropped systematically from 1980 to 1990. This agrees with most other studies (Rendón and Salas 1993).⁴ Boltvinik then deflates rent equivalent income from their 1992 levels to 1989 values according to *rent price indexes*, and not *general price indexes*. This results in a larger amount of deflation of rent income than the official one. In addition, he subtracts gift income, because the survey does not account for gifts given. As a result, total household income in deciles 5, 6, and 7 *dropped* by 3.1, 2.7, and 1.6 per cent between 1989 and 1992. Since households in lower deciles remain poor, poverty should have increased, albeit moderately, from 64 per cent to 66 per cent during the period (Boltvinik 1994: 126).

Boltvinik also provides assessments of changes in schooling, overcrowding, public services and access to health care and social security (ibid: 126-43). These assessments are based on censuses and sources other than ENIGH. He concludes that, during the decade of crisis (1980-90), adjustment and restructuring policies brought about a *significant slowdown in the rate of improvement of all these goods and services*. At the same time, however, he adds that the provision of these services seems to have had a significant impact on the alleviation of poverty. The

services may be inefficient, but their coverage and actual delivery have improved. The obvious risk here is that the proposed privatization of these services may withdraw their benefits from large segments of the poor. His conclusion is consistent with analyses dealing with the evolution of infant and child mortality rates from 1980 to 1987–8, which on the whole *slowed their rate of improvement of the 1970s but did not worsen* (Langer et al. 1991). This latter analysis also concludes that the gap in mortality rates widened during the period between the poorer and the richer states of Mexico, and that some poverty-related infant and child diseases account for a growing number of deaths (tuberculosis, gastrointestinal diseases, and other malnutrition- and poverty-related illnesses such as pneumonia).

There are reasons to believe that this increase in poverty – during a period in which the government claims general income improvement – may be still larger. According to Cortés (1994), 1992 income levels may have been overestimated by *increasing the proportion of households reportedly living in “low density” or rural areas*. The survey referred to assigns a lower cost to the food basket in rural areas. As explained in the previous section, the rural sub-sample of ENIGH has increased as a proportion of the total sample. Apparently, this was done by reclassifying households in semi-urban areas as “rural” and therefore as able to survive on lower incomes. The result is that Mexico, according to the survey, is more rural now than in 1984, and Mexico’s low-income households are therefore able to buy more food on lower incomes than before. This is contrary to reality. Mexico is becoming still more urban. If these households were reassigned, as seems natural, to urban areas and to urban costs of living, the results would show that their ability to purchase the food basket has dropped, and the resulting poverty levels are greater for 1992. But it seems this adjustment cannot be done on the basis of the existing microdata sets, except by a case-by-case evaluation, which is very time-consuming.

A further difference between official and other analyses lies in the year taken as a baseline. Average wages and salaries fell by 19.2 per cent from 1982 to 1984. This latter year is therefore a *low* reference point for 1989 and 1992, and one that can easily provide optimistic evaluations of later dates. Both Cortés and Boltvinik use 1977 as a baseline, because this corresponds to the last survey before the 1982 crisis. This is then a *high* point of reference, but not as high as 1981, when average pay set record levels.

The evolution of poverty in Mexico during restructuring cannot be explained on the basis of GNP performance alone. A large

number of analyses have shown that wages fell in Mexico during 1989–92 in spite of moderate economic growth, and that income concentration rose. Unemployment was not considered a major factor in Mexican restructuring up to 1994. Although it rose significantly in 1983, it has never reached 10 per cent in any major city. This is due to the fact that adjustment with inflation meant that the public and private sectors enjoyed a rapidly falling wage bill and had no need to resort to massive lay-offs (Lustig 1992), to the inability of the poor to remain unemployed, because there are no unemployment benefits in Mexico, and to the relative openness and acceptable incomes provided by work in the informal economy. Income inequality therefore is related not to unemployment levels, but rather to the rewards of people who work.

Cortés and Rubalcava (1991) provided the first evaluation of changes in the income structure from 1977 to 1984. In their words, during this period Mexico underwent “equalization through impoverishment”. The Gini index dropped from 1977 to 1984, but since economic performance was negative this meant that the number and proportion of the poor rose. Cortés (1994) carried out an analysis of income inequality from 1977 to 1992 that controls for number of earners in the household and for changes in the number of households. According to him, from 1977 to 1984, the households most affected by adjustments were those in the cities. This brought about a fall in their income, and a relative “equalization” of their income to rural incomes, which make up the lowest three deciles. Per worker income in deciles 6 to 10 fell during this period. This produced less inequality. From 1984 to 1989, however, 70 per cent of the gains in the national economy were captured by the tenth decile. Other gains were explained by an expansion in the number of earners per household. This produced more inequality, because most gains went to the top. During the last period (1989–92), there was a further gain of the top deciles, explained mostly by a rise in earnings per worker in the tenth decile and a rise in the number of workers per household in the middle deciles. This again increases inequality, because most gains go to the top.

In summary, from 1977 to 1992 there was growing income inequality explained by increasing incomes per worker for the tenth decile and increasing numbers of workers for the “middle” deciles (deciles 6–9, which comprise a part of the poor). The latter finding coincides with previous micro-sociological analyses (Cortés 1994: 15). On the basis of a simulated income structure in which the number of household workers remains fixed, Cortés also concluded, again in agreement with micro-sociological ana-

lyses (González de la Rocha 1986), that *inequality – and poverty – would have been considerably greater in Mexico in 1992 if households had not increased their number of workers.*

Cortés's and Boltvinik's analyses are complementary in most respects, and they do not contradict official results for 1977–84 and 1984–9. They do contradict, however, the official results concerning 1989–92: poverty and inequality increased in Mexico at a time of moderate but constant growth. A “comprehensive” approach to the understanding of poverty should also stress that the components *partially* alleviating this worsening of poverty came from the satisfaction of other, mostly non-income, needs, such as education, health, less overcrowding and some additional public services provided to poor households. The main difference between Cortés and Boltvinik lies in their appreciation of the changes in the size of the labour force, and in the sociological significance of this change.

There are no recent analyses of the question posed above, i.e. whether the growing workload of the poor produces some actual wealth among them or merely redistributes existing GNP. This is obviously related to the role of the informal economy and its changes with restructuring. Lustig (1987, 1992) has provided two analyses of this question. Simply put, she showed that most of the added labour producing non-wage returns after 1977 did not produce much added income to wage-based households; in other words, although labour participation is countercyclical, non-wage earnings (including earnings from self-employment) are procyclical. This would modify Cortés's findings to some extent, because this would mean that the poor have had to place more and more members in a race that is increasingly competitive and whose total rewards are mostly fixed. Those not entering the race may in fact lose income, but those “winning” the race are only taking what is available, not generating any more wealth. In my opinion, this must be increasingly the case, as the informal economy becomes saturated, formal demand for goods and labour stagnates after 1994, and capital is no easier to get (which would improve the productivity of the labour of the poor in small economic units). In other words, increased labour invested in non-formal work may have been very useful to the household up to approximately 1987, but it is less and less so.

Another aspect of the results of the above analyses has to do with the rural/urban divide. As said, there is agreement that most extreme poverty and the poorest among the poor were found in rural areas at the onset of adjustment and restructuring. But these policies affected, initially, mostly urban workers. This meant that the urban component of poverty rose from 1977 to

1984. Official results (ECLAC/INEGI 1993b) indicate that the number of extremely poor individuals in rural areas rose from 6.7 to 8.4 million from 1984 to 1989, and still increased slightly to 8.8 in 1992. Those in urban areas rose from 4.3 to 6.5 million and then dropped to 4.8. But comparative trends in rural and urban poverty and inequality resulting from this analysis may not be entirely reliable, owing to the above-described changes in the rural/urban allocation of a part of the sample and for the other reasons noted by Boltvinik and Cortés.

Gender, as said in the previous section, is increasingly salient, although so far this has meant mostly that women's studies have become increasingly relevant. There are no specific studies of male unemployment or of the marginalization of middle-aged men from formal employment in gender terms, although this phenomenon is increasingly important. Studies on gender and poverty develop in two main areas: (a) whether women's increasing participation in the labour market has produced less or more discrimination and segregation in the market and an improvement or not in their position in the household; (b) the interaction between women's household roles and poverty, which itself may be divided into two main areas of discussion – first, whether female-headed households are poorer or not, and whether they tend to change or reproduce societal gender roles; second, whether women's positions in the household require poverty to be defined on an intra-household basis (as said before, intra-household divisions of labour and differential consumption may lead to greater deprivation among women).

García and Oliveira (1994) found that increased female participation in the labour market, before restructuring, was due to the increasing participation of young, educated, childless women (whether married or not). This was a period of steady but slow rise in their participation rates. The longer-term analysis of trends, which included the period 1982–7, however, showed that increased participation was due to the incorporation of women in their thirties, with little or no schooling, with a marriage history, and with small children. *The factors that had inhibited the participation of these women in the labour market before 1982 (low schooling, young children) were no longer important.* In other words, falling domestic incomes forced poor women to seek employment or other money-making activities, and their added income was the key element in cushioning the household from the worst impact of restructuring (González de la Rocha 1988, 1990). However, González de la Rocha, García and Oliveira (1994), and Escobar (1992) also found that these women were mainly working informally, via domestic employment or

other personal services. This meant that their incomes were low, and that their incomes worsened as more and more of these women entered the market. The rise in *maquiladora* or in-bond export production, which still employs mostly women (approximately 360,000 in 1992), does not seem to have altered this situation substantially. This is still a very small fraction of national employment, and wages in these plants are lower than average in Mexican manufacturing, which does not significantly improve the total income of these women's households.

Roberts (1992) found women earned, on average, 23.6 per cent less than men in the border cities and 27.0 per cent less in the principal Mexican cities in 1987–8. In the border area, women who owned small firms equalled men's earnings, while in the main cities they were still at a disadvantage of 32.4 per cent in relation to men's earnings. Discrimination in the labour market is important for analyses exploring the impact of women's income-producing work on their households and their ability to overcome intra-household authoritarianism and inequality. González de la Rocha (1994) asserts that labour market discrimination makes for the reproduction of authoritarianism, because women's incomes are below those necessary to threaten men's economic dominance in the household, in spite of the fact that women's income may be used up entirely in securing household basics. In summary, women are participating much more in the labour force now than at the onset of restructuring. This, however, has not yet improved their household position.

González de la Rocha (1988) has asserted that female-headed households, which have increased as a proportion of total households in Mexico, show lower total and per capita income levels than male-headed households. This is due, in her view, to labour market discrimination against and segregation of the main household earner (a woman) and to a lower availability of other household members for money-earning work. This entails higher dependency ratios. Lower availability results from the age structure of the household (female-headed households are overwhelmingly made up of women in their thirties and young children) and the need for one of the other members to replace the household head in housework. Chant (1988, 1990) countered that, although total and per capita consumption levels are lower, female-headed households produce greater well-being among their members for two reasons – the absence of male violence and authoritarianism, and a more egalitarian division of work and consumption. In more recent research (1994), González de la Rocha has found that female-headed households allot a greater proportion of total expenditure to items fundamental for

well-being, such as food and education, and therefore less to alcohol and high-cost items that in other households are given preferably to men (tobacco, meat). Per capita food consumption in female-headed households is in fact higher than in comparable working-class male-headed households (*ibid.*).

The question of women's intra-household deprivation is a crucial one, because it calls for special kinds of targeted programmes as opposed to general price or "family" subsidies. It also means that women may be extremely poor in households that do not seem to be so, which has long-term consequences for these women and their offspring (who would show the effects of extreme poverty even though the household income may lie above that line). This finding, which is often repeated in the literature, calls for a redefinition of vulnerable groups and the policies directed at them. Although gender researchers' results agree on this point, it would be necessary to explore whether differential food consumption affects the household by creating a gender barrier to nourishment, as they assert, or whether the expensive and prestigious items reserved for men affect them by creating other health problems, associated with meat, animal fats, and alcohol. If the second tends to be the case more often than the first this would not call for complacency, because it would mean that a sizeable portion of the household budget is devoted to items that could be better spent on basics, and that this bias is still responsible for some of the malnutrition and morbidity/mortality rates found.

However, it seems that the amounts of time worked and the income received are not the only changes resulting from restructuring in Mexican households. Several other occurrences are serving to turn households into units that more efficiently organize the survival of the poor. First, there is a rise in the number and proportion of non-nuclear households, explained by the inability of newly weds to afford a new house and the advantages they and their parents derive from their continued residence in the home. The same result (a complex household structure) is produced by the incorporation of persons who provide additional incomes or perform housework while others previously tied to house chores seek paid work. Second, results differ on the extension of mutual help and inter-household cooperation. Mexican research into the survival of the urban poor has always stressed inter-household cooperation (Lomnitz 1975, 1977). But whereas González de la Rocha has found that inter-household gift and help exchanges increase with restructuring, Selby et al. (1990), on the one hand, and Benería, on the other, found that co-operation tends to become internal to the household, with

inter-household exchanges losing importance or becoming less flexible. Less inter-household cooperation would seem to be at odds with the general finding from ENIGH discussed above, i.e. that gift income has increased significantly among Mexican households.

NOTES

1. It is understandable that no rural populations were interviewed in the Federal District in 1984; it is more than 99 per cent urban. The absence of rural households in the samples of partly rural states (Yucatán and Guerrero), however, is less easily understood.
2. This is an unadjusted estimate of this income equivalent and, since the fortunes of these billionaires and the incomes of the poor come from entirely different sources, they are not strictly comparable.
3. The line defining extreme poverty lies at a per capita monthly income of 1,803 pesos at (1st quarter) 1984 prices according to SPP/ILO/UNDP. ECLAC places it at 3,069, H. Laos at 7,560, and Levy at 2,580.
4. The only source stating that wages have risen since 1987–8 is the presidential state of the nation address, which is based on the Encuesta Industrial Mensual, a fairly small sample of large enterprises. A breakdown of these figures shows that income rose only for non-manual employees in these firms (Rendón and Salas 1993).

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