

Social Rights and Poverty Measurement: The Experience in Mexico.

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**Curso internacional: Teorías y métodos contemporáneos
para la medición de pobreza multidimensional
26 de noviembre de 2021**

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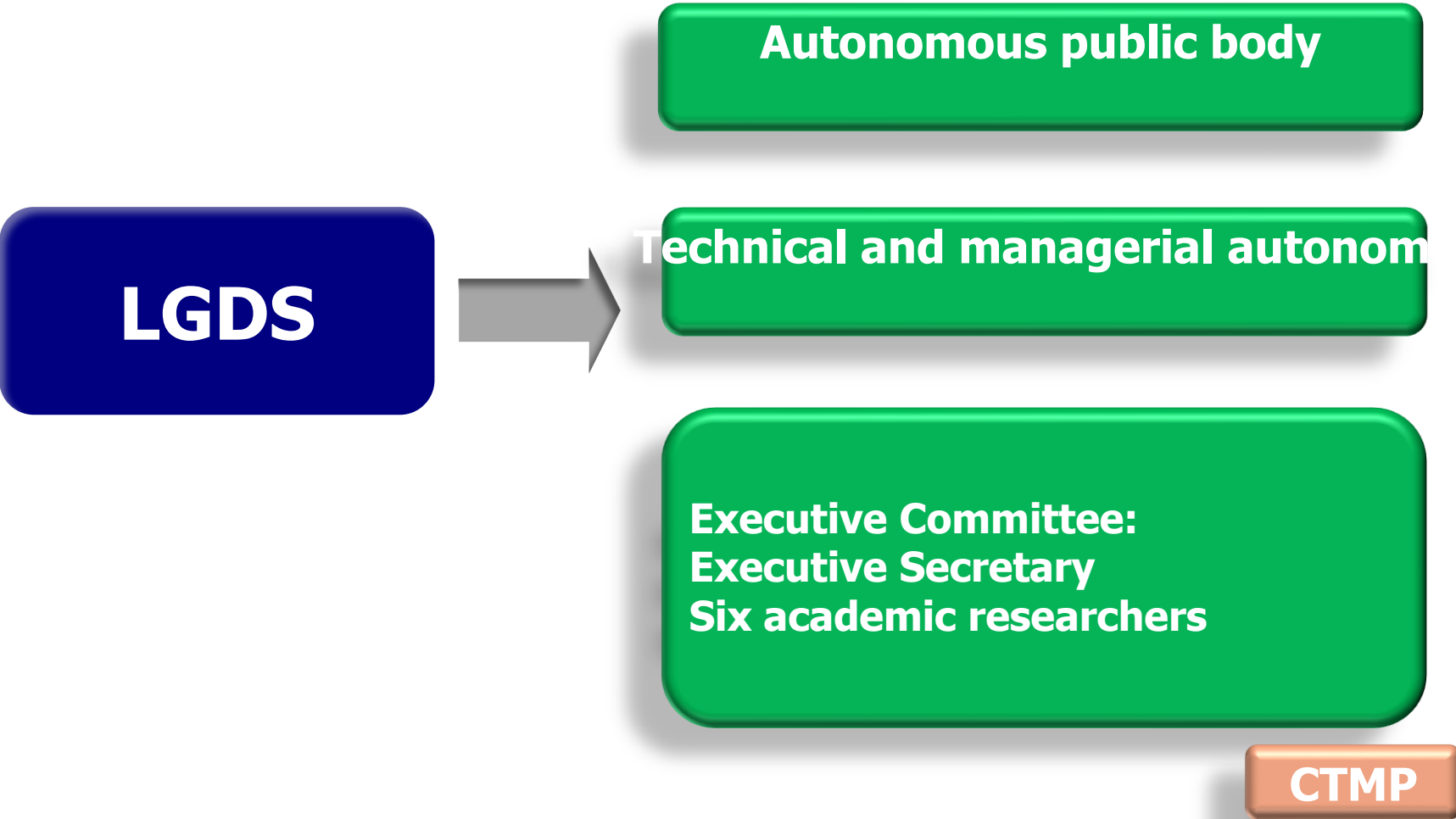
I.- The National Council for the Evaluation of Social Development Policy (CONEVAL) and the General Law on Social Development (LGDS)

II.- The process of building the multidimensional measurement of poverty in Mexico

III.- Multidimensional measurement of poverty, the Mexican experience

I.-CONEVAL AND THE GENERAL LAW OF SOCIAL DEVELOPMENT (LGDS)

Creation of CONEVAL



Elección de los investigadores

Be or have
been a member
of the SNI

Have
experience in
the field

Collaborate
with a higher
education or
research
institution*

*Inscritas en el Padrón de excelencia del CONACYT

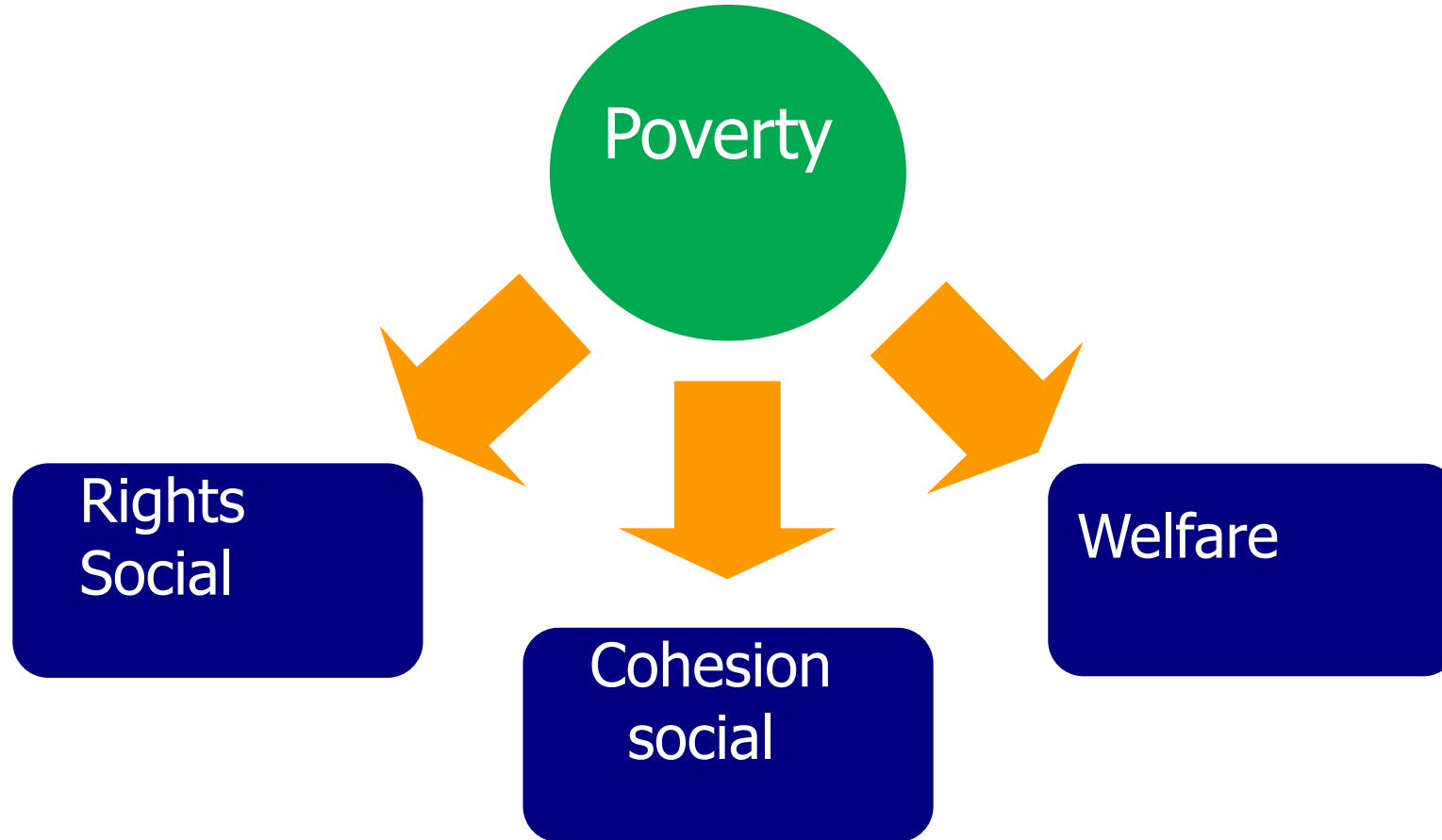
Purpose of CONEVAL



Functions of CONEVAL in this area of poverty

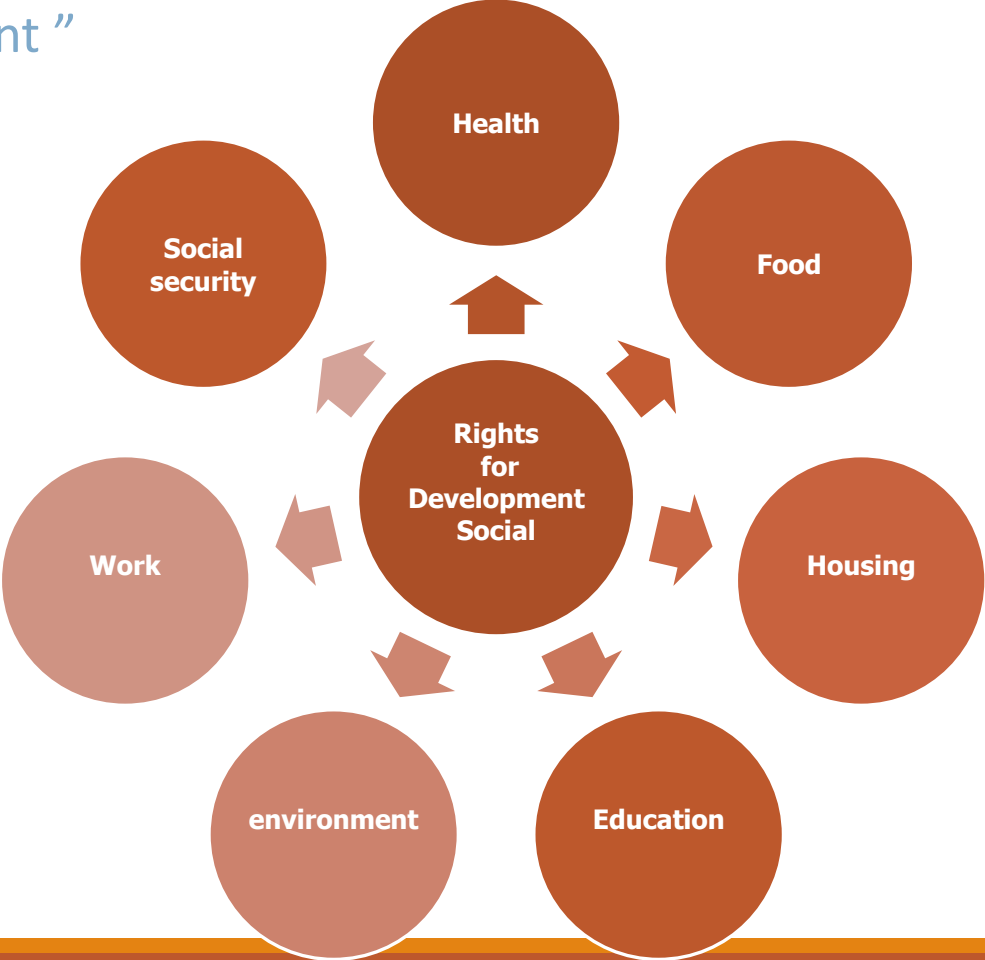
- Provide guidelines and criteria for the multidimensional measurement of poverty
- Provide guidelines and criteria to determine Priority Attention Zones
- Coordinate poverty measurement and analysis studies
- Issue public policy recommendations

The concept of poverty in the LGDS



Ley General de Desarrollo Social

"Guarantee the full exercise of the social rights enshrined in the Constitution, ensuring the access of the entire population to social development "



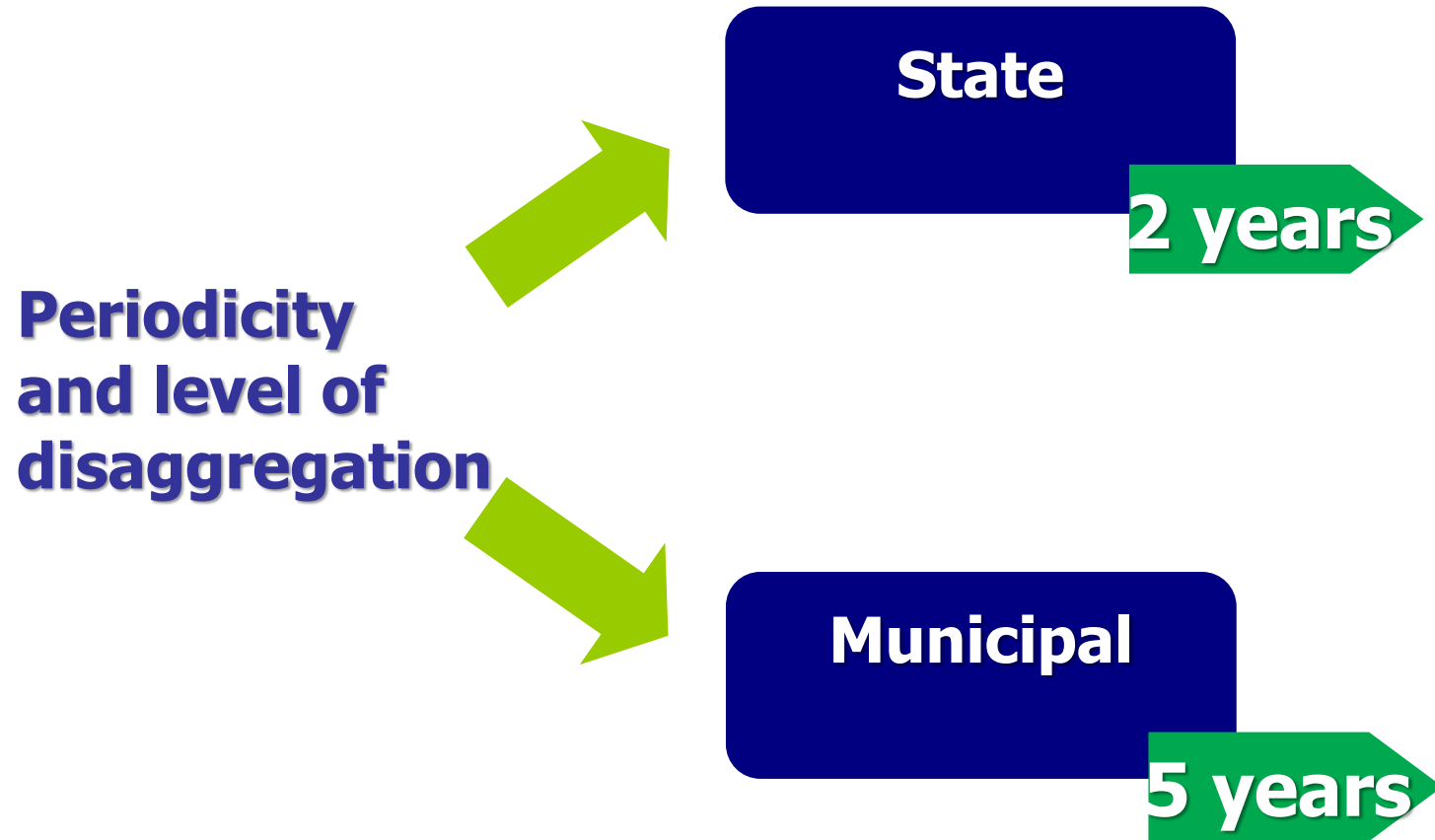
Multidimensionalidad.

LGDS, artículo 36

- CONEVAL will use the information generated by INEGI in,
- at least the following indicators:
-



Periodicidad. LGDS, artículo 37



II.- MULTIDIMENSIONAL MEASUREMENT: THE PROCESS

Methodology

INTENSE
CONSTRUCTION
PROCESS 2006-
2009

Permanent consultation
National researchers
International researchers

Consultation with the population
to determine the level of well-being
necessary for the population

The Socioeconomic Conditions Module was added to the ENIGH survey, which was designed in collaboration with INEGI, between 2007 and 2008.

Methodological proposals

Satya Chakravarty

James Foster

David Gordon

Julio Boltvinik

Rubén Hernández
y Humberto Soto

- Incorporate Article 36 indicators of the LGDS.
- Clearly identify the population in a situation of poverty.
- Allow measurement and disaggregation of poverty at the state and municipal levels.
- Allow the comparison in time of the proposed indicators.
- Report the results of an empirical application.

Identification of the population in poverty

- The process of identifying the population in a situation of poverty consisted of four stages:

Selection of relevant dimensions

Identification of poverty by income

Creation of the deprivation index (education, health, social security, housing and food)

Combination of income and deprivation rates

Determinación de umbrales para las carencias

CRITERIOS

Legal

From experts

Statistical

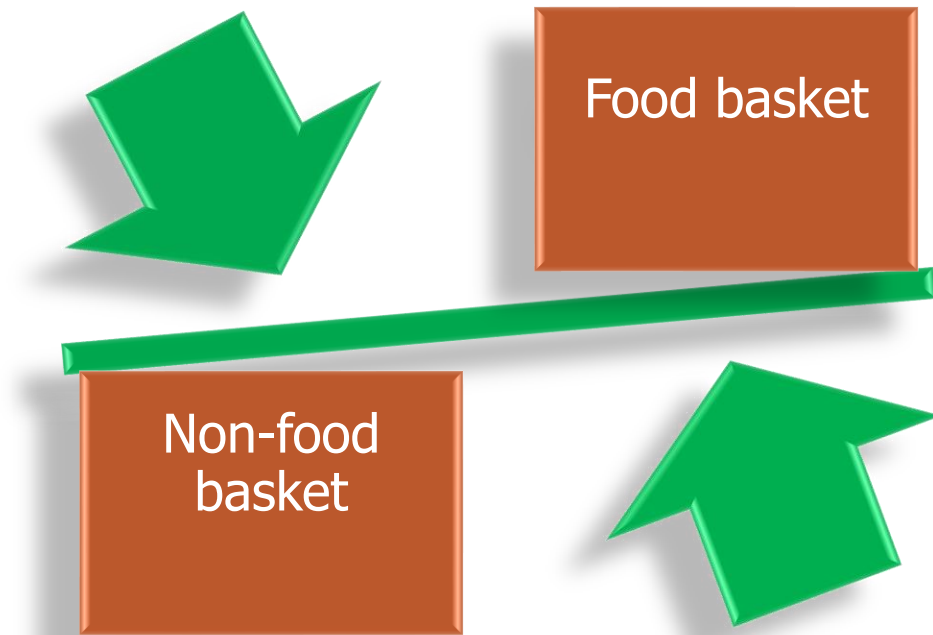
Exogenous

- How many deprivations make a household poor? All? At least one? An intermediate value? Statistical methods.
- Whether or not to grant weights other than dimensions is also related to the measurement from a conceptual scheme of rights or well-being.

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And as for the thresholds for income:

Elaboración de canastas



Canasta alimentaria

INEGI-CEPAL

- Elaborada en 1992
- Requerimientos calóricos en zonas rurales y urbanas

CONEVAL

- Elaborada en 2006
- Requerimientos calóricos y micronutrientes en
- zonas rurales y urbanas

Canasta no alimentaria



Rural y urbana

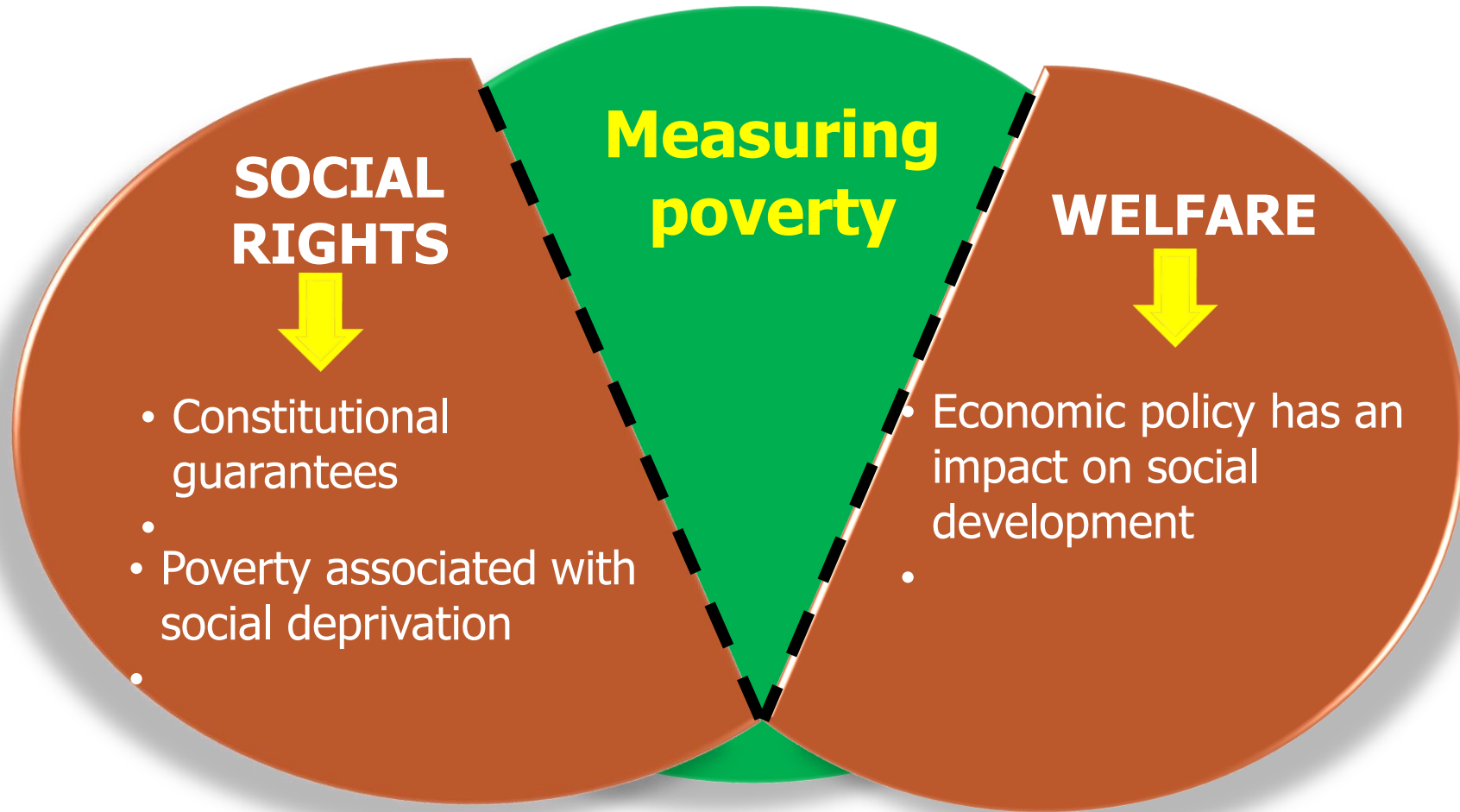
Patrones de gasto no alimentarios

Criterios:

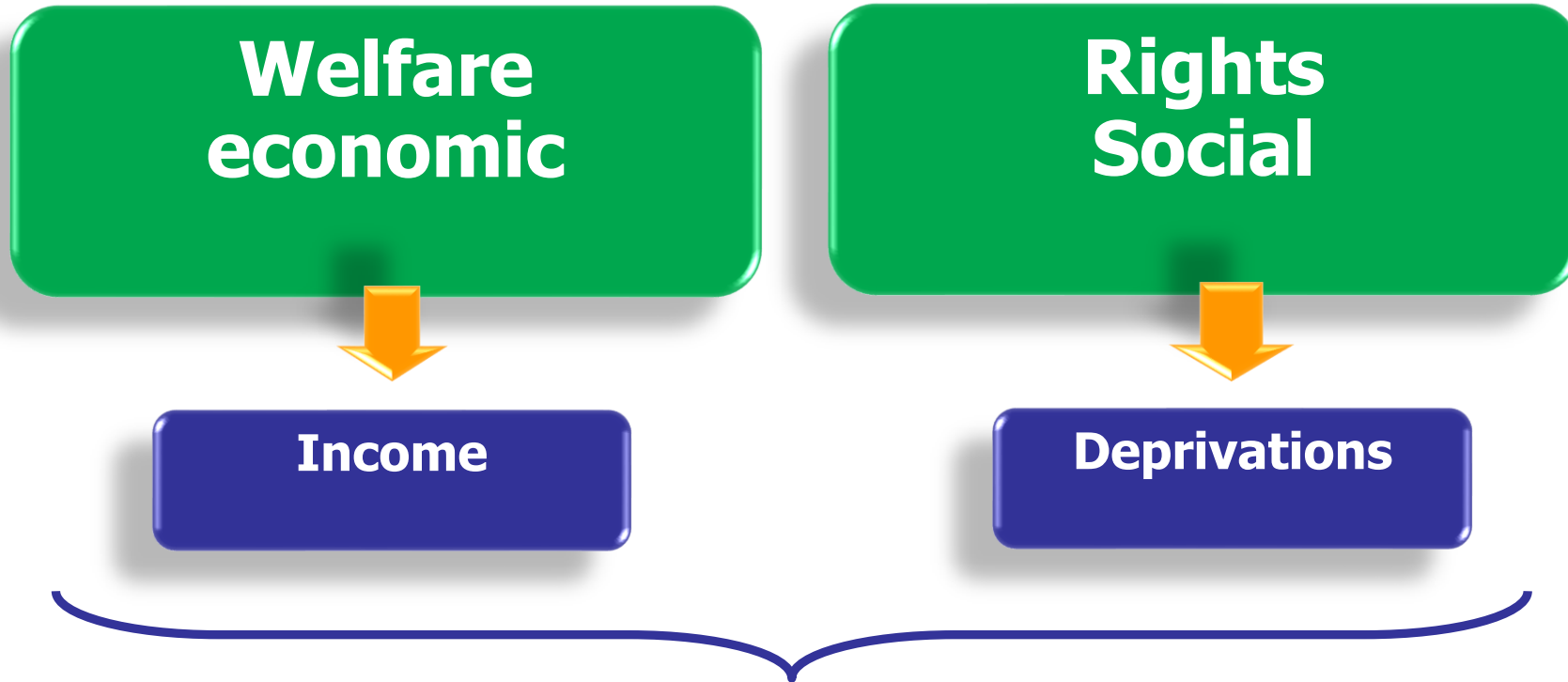
- Bienes con elasticidad-ingreso < 1
- Que más del 50% de los hogares perciban el bien o servicio como necesario.
- Que la participación $GBS/GT > .16$
- Que más del 20% de los hogares del EPR consuman el bien o servicio.

III.- MULTIDIMENSIONAL MEASUREMENT: THE MEXICAN EXPERIENCE

Measurement approach



Dimensions



Spaces of different nature

That are put into a two-dimensional measurement

Thresholds

Welfare –income- has are two thresholds. The minimum welfare line whose value is equal to the value of the food basket and the welfare line that includes, in addition to food, the value of the non-food basket

In the rights' domain, it should be taken into account that social rights are:

Derechos sociales

Inherent
Universal
Absolute
Inalienable
Inviolable
Imprescriptible
Indissoluble
Indivisible
Irreversible
Progressive

Indissoluble
Inseparable set of

Indivisible
They have no hierarchy
with each other

entire human race
at all times and
places.

Índice de privación social

Social rights are inherent in human beings and apply at all times and places (they are universal)

Social rights are indivisible (they have no hierarchy) they are also indissoluble, it is an inseparable set of rights, which means that they are satisfied if they are all satisfied.

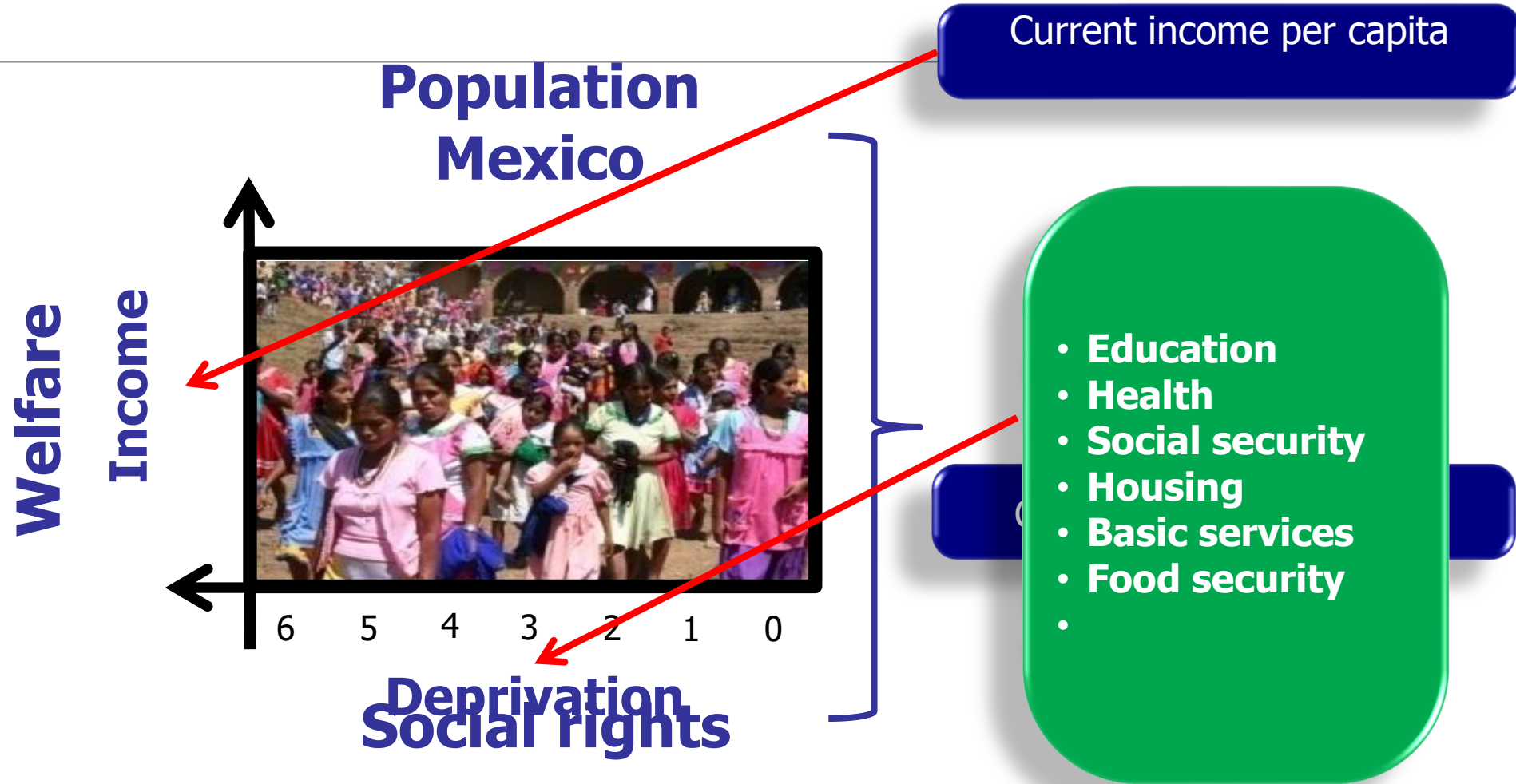
As rights apply equally to all people and are satisfied or not, they can be represented by dichotomous variables (lacking or not lacking) and because they are not hierarchical, it is not possible to weigh.

Based on these properties, the dichotomous variables representing rights can be combined linearly in the index of social deprivation.

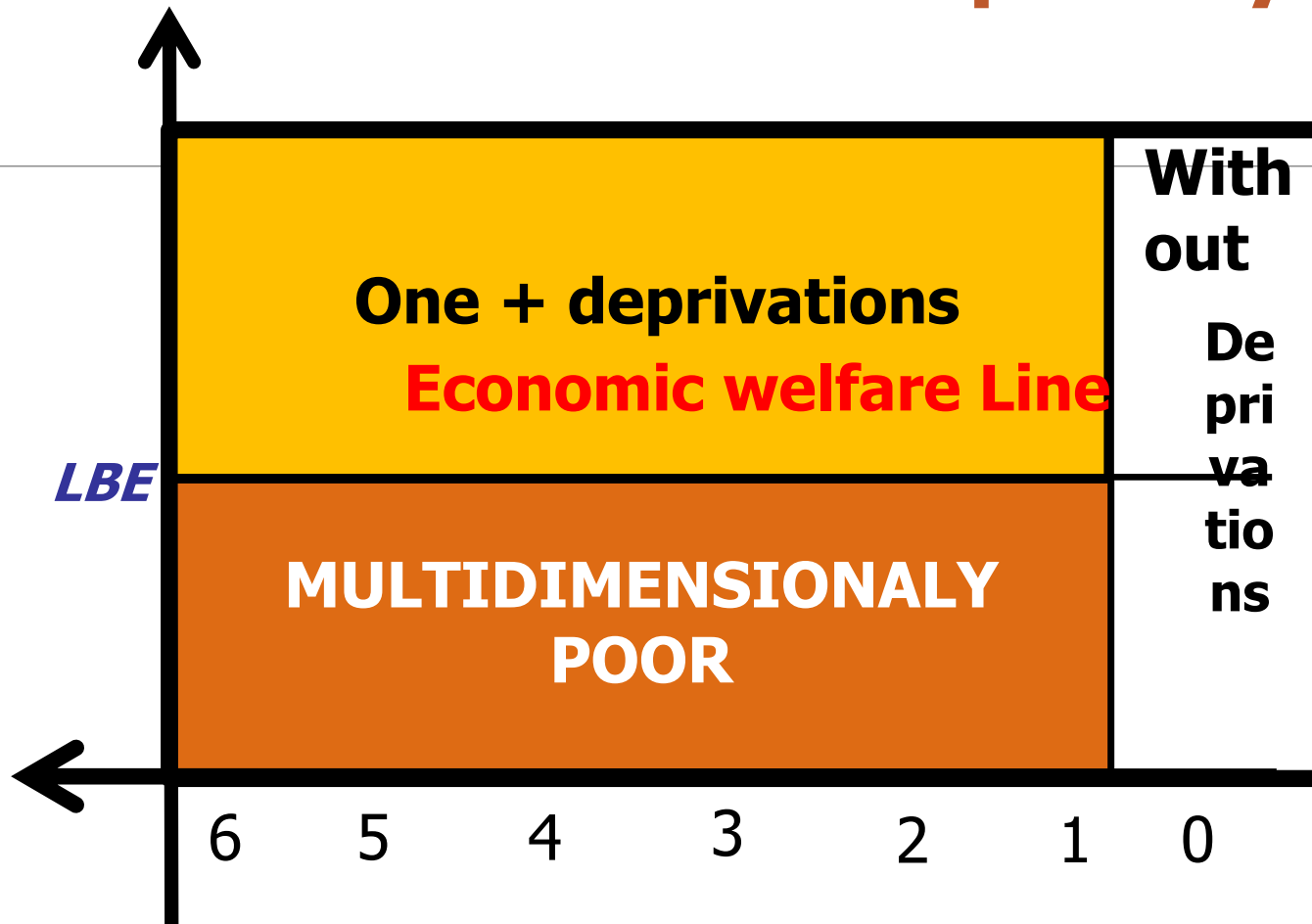
$$I = x_1 + x_2 + x_3 + x_4 + x_5 + x_6$$

Rights are satisfied only if $I=0$, since they are indissoluble. The threshold is 1.

How is the methodology?



Identification of poverty



Deprivations
Social rights

Definition of multidimensional poverty

"A person is in a situation of multidimensional poverty when: he has at least one social deprivation and does not have a sufficient income to meet his needs."

Poverty and social policy

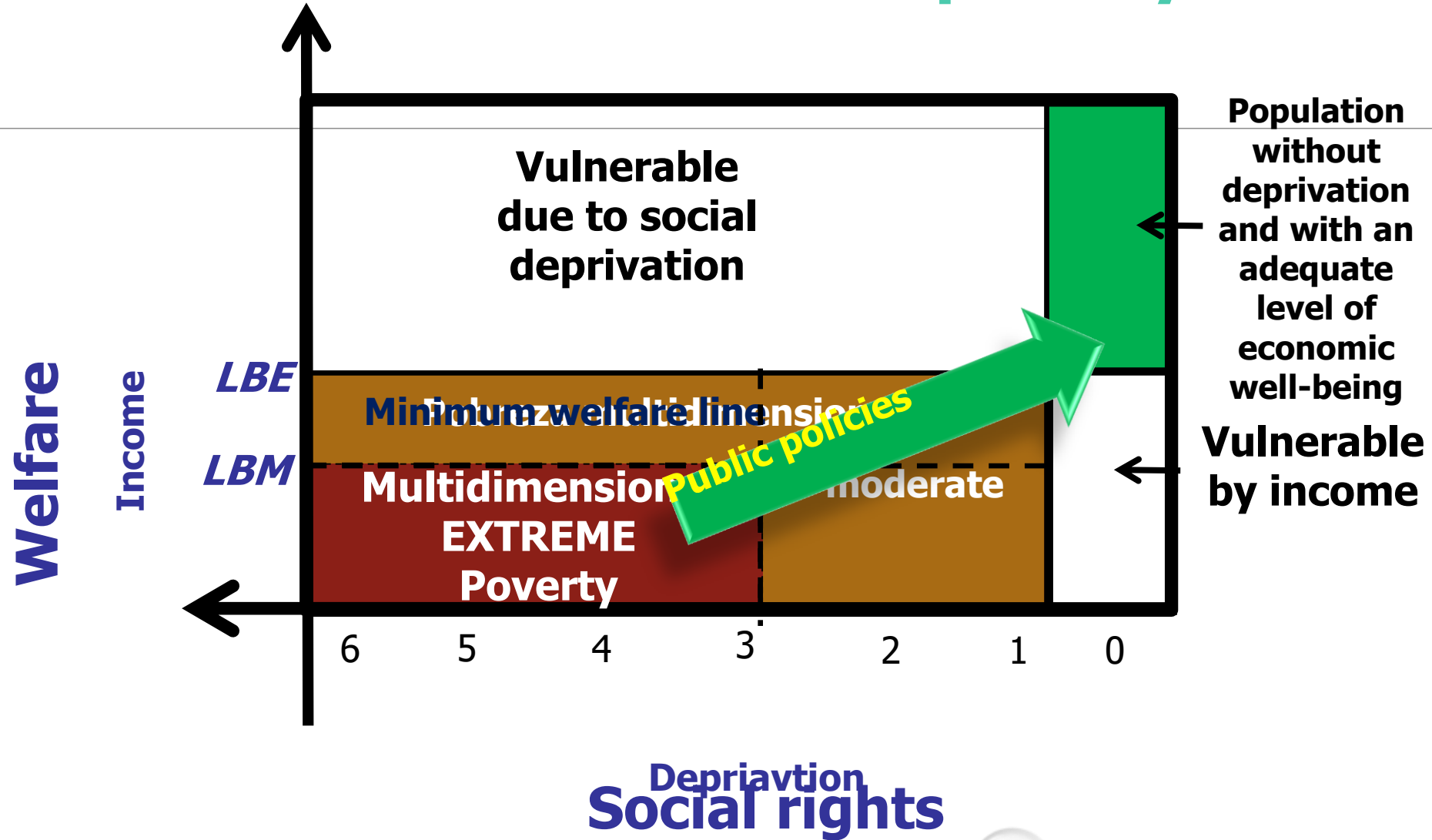
Taking into account that CONEVAL has the function of measuring poverty and evaluating social policy, it was considered necessary to have a measurement of the depth of poverty: that identifies the poorest among the poor

This is how the situation of extreme multidimensional poverty was defined. In the field of welfare, the value of the food basket was used as a threshold and in the area of rights it was identified by means of statistical analysis (DG).

Definition of extreme multidimensional poverty

"A person is in a situation of extreme multidimensional poverty when: he has three or more social deprivations and does not have a sufficient income to acquire the goods of the food basket."

Identification of poverty



Examples

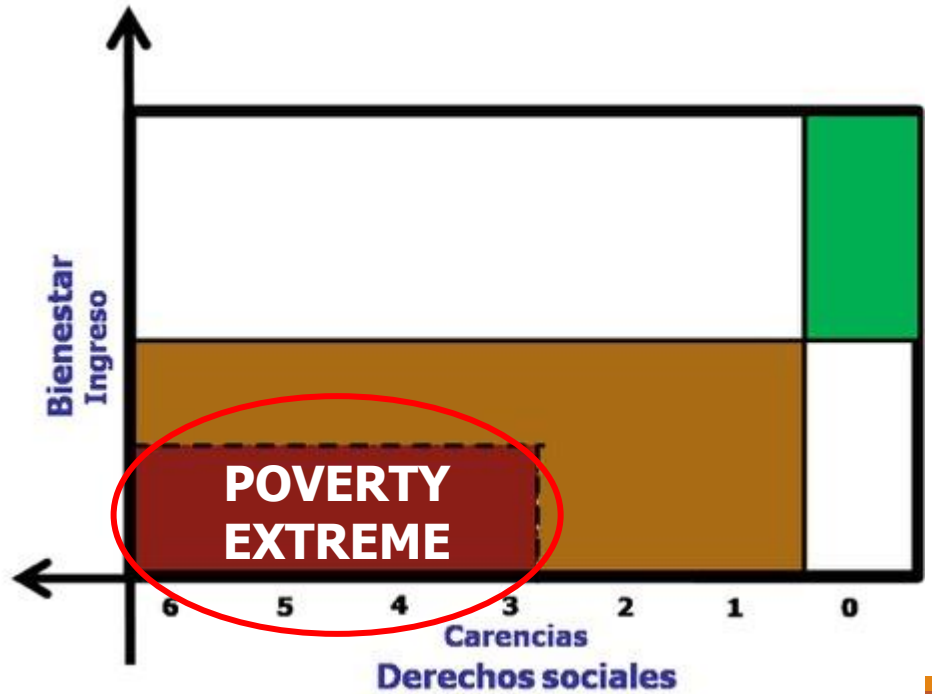


He is 15 years old.
He stopped studying to help his family

Lives in a house with a bedroom where 8 sleep

He made it to first grade in high school and doesn't have social security.

Sometimes they eat once a day due to lack of resources



Examples

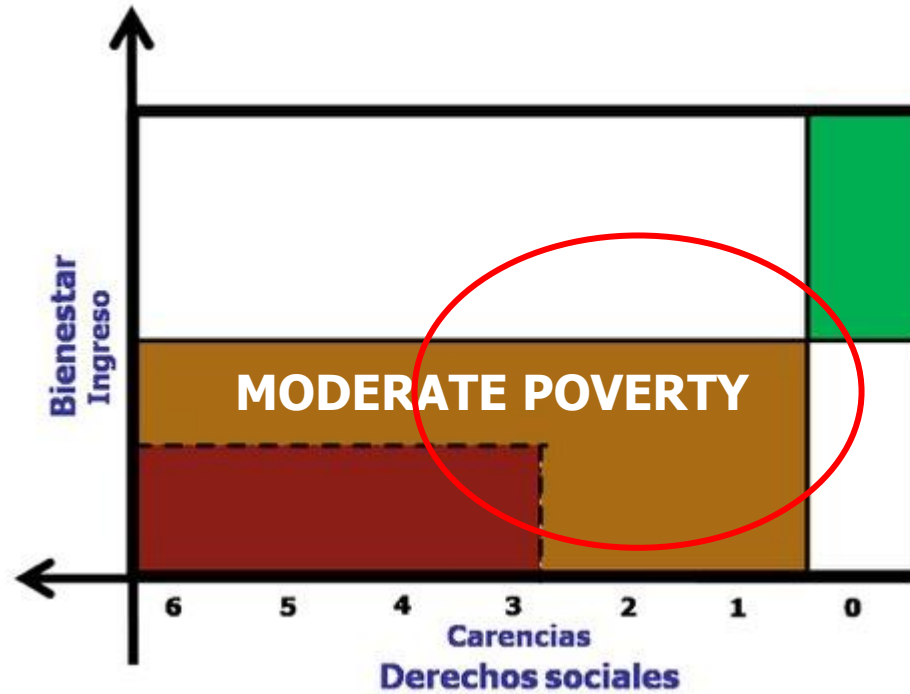


Work as
and
irregular
worker

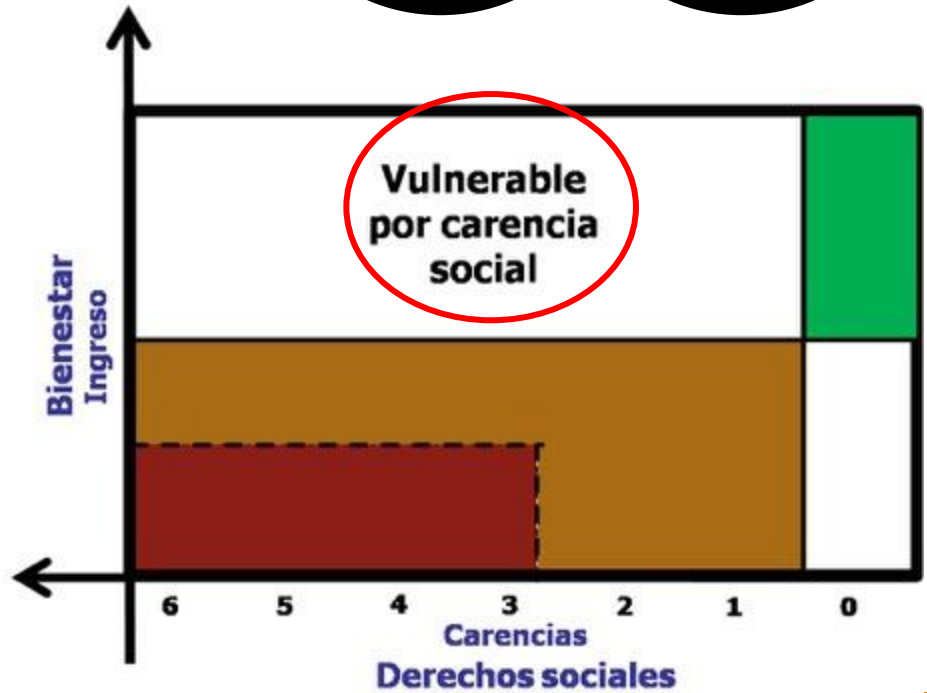
His home
does not
have piped
water

His income
is below
the welfare
line

Did not
finish
elementary
school



Ejemplos



Ejemplos

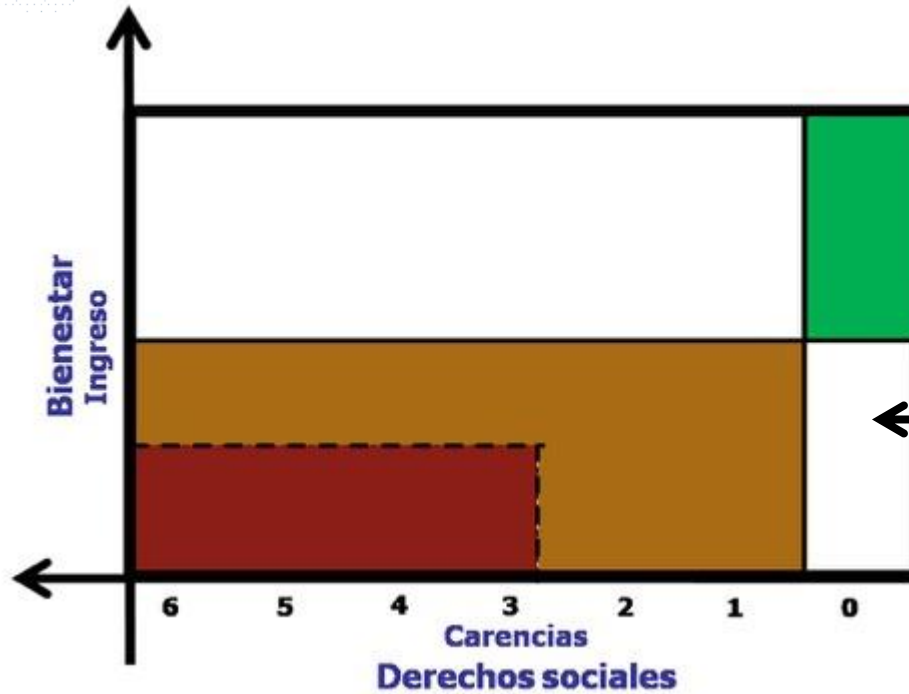


Bajaron sus ventas

Tiene casa propia, con todos los servicios

Paga seguridad social voluntaria, terminó la preparatoria

Hace cuatro meses los costos de su empresa son mayores que sus ingresos



Vulnerable por ingreso

Advantages

- The methodology has a focus on Social Rights

- You can see the interaction of economic policy and social policy

- Different sub-populations can be analyzed

Indigeno
us

Gender

Old people

Children

States

Municipalities (2010)

Advantages

- Poverty is visible, but also the vulnerable population that has problems of income or social deprivation.

-

- The methodology makes clearer the policies that must be applied jointly to improve social development:

- Economic and social policies
- Universal and targeted policies
- Complementary rather than isolated actions

-

Medición de la pobreza, Estados Unidos Mexicanos, serie 2008-2020																			
Porcentaje, número de personas y carencias promedio por indicador de pobreza, 2008-2020																			
Indicadores	Legislación 2010													Legislación 2018					
	Porcentaje						Millones de personas						Porcentaje			Millones de personas			
	2008	2010	2012	2014	2016	2018	2008	2010	2012	2014	2016	2018	2016	2018	2020	2016	2018	2020	
Pobreza																			
Población en situación de pobreza	44.4	46.1	45.5	46.2	43.6	41.9	49.5	52.8	53.3	55.3	53.4	52.4	43.2	41.9	43.9	52.2	51.9	55.7	
Población en situación de pobreza moderada	33.3	34.8	35.7	36.6	35.9	34.5	37.2	39.8	41.8	43.9	44.0	43.1	36.0	34.9	35.4	43.5	43.2	44.9	
Población en situación de pobreza extrema	11.0	11.3	9.8	9.5	7.6	7.4	12.3	13.0	11.5	11.4	9.4	9.3	7.2	7.0	8.5	8.7	8.7	10.8	
Población vulnerable por carencias sociales	32.3	28.1	28.6	26.3	26.8	29.3	36.0	32.1	33.5	31.5	32.9	36.7	25.3	26.4	23.7	30.5	32.7	30.0	
Población vulnerable por ingresos	4.7	5.9	6.2	7.1	7.0	6.9	5.2	6.7	7.2	8.5	8.6	8.6	7.6	8.0	8.9	9.1	9.9	11.2	
Población no pobre y no vulnerable	18.7	19.9	19.8	20.5	22.6	21.9	20.9	22.8	23.2	24.6	27.8	27.4	24.0	23.7	23.5	28.9	29.3	29.8	
Privación social																			
Población con al menos una carencia social	76.6	74.2	74.1	72.4	70.4	71.2	85.5	85.0	86.9	86.8	86.3	89.1	68.5	68.3	67.6	82.7	84.6	85.7	
Población con al menos tres carencias sociales	31.7	28.2	23.9	22.1	18.7	18.8	35.4	32.4	28.1	26.5	23.0	23.5	20.0	20.2	23.0	24.1	25.0	29.2	
Indicadores de carencia social																			
Rezago educativo	21.9	20.7	19.2	18.7	17.4	16.9	24.5	23.7	22.6	22.4	21.3	21.1	18.5	19.0	19.2	22.3	23.5	24.4	
Carencia por acceso a los servicios de salud	38.4	29.2	21.5	18.2	15.5	16.2	42.8	33.5	25.3	21.8	19.1	20.2	15.6	16.2	28.2	18.8	20.1	35.7	
Carencia por acceso a la seguridad social	65.0	60.7	61.2	58.5	55.8	57.3	72.5	69.6	71.8	70.1	68.4	71.7	54.1	53.5	52.0	65.4	66.2	66.0	
Carencia por calidad y espacios de la vivienda	17.7	15.2	13.6	12.3	12.0	11.1	19.7	17.4	15.9	14.8	14.8	13.8	12.0	11.0	9.3	14.5	13.6	11.8	
Carencia por acceso a los servicios básicos en la vivienda	22.9	22.9	21.2	21.2	19.3	19.8	25.5	26.3	24.9	25.4	23.7	24.7	19.2	19.6	17.9	23.1	24.3	22.7	
Carencia por acceso a la alimentación	21.7	24.8	23.3	23.4	20.1	20.4	24.3	28.4	27.4	28.0	24.6	25.5	21.9	22.2	22.5	26.5	27.5	28.6	
Bienestar																			
Población con ingreso inferior a la línea de pobreza extrema por ingresos	16.8	19.4	20.0	20.6	17.5	16.8	18.7	22.2	23.5	24.6	21.4	21.0	14.9	14.0	17.2	18.0	17.3	21.9	
Población con ingreso inferior a la línea de pobreza por ingresos	49.0	52.0	51.6	53.2	50.6	48.8	54.7	59.6	60.6	63.8	62.0	61.1	50.8	49.9	52.8	61.3	61.8	66.9	

Fuente: estimaciones del CONEVAL con base en el MCS-ENIGH 2008, 2010, 2012, 2014 y el MEC del MCS-ENIGH 2016 y 2018.

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THANK YOU FOR YOUR PATIENCE