

Social Inclusion within the Framework of the Multidimensional Measurement of Poverty in Mexico¹

Ricardo Aparicio
Director, Poverty Analysis. CONEVAL

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As a concept, the meaning of social inclusion has evolved somewhat beyond its initial theoretical origin and tends to be defined by opposition to the meaning of social exclusion. However, in any case, social inclusion alludes to individuals' access to essential elements related with their wellbeing and the development of their capabilities and functionalities. Broadly speaking, social inclusion represents people's capabilities to exercise their human rights and a set of civil liberties that enable them to participate in society and to reinforce their individual and collective identity.

According to the United Nations Educational, Scientific and Cultural Organization (UNESCO), an inclusive society is defined "as a society for everyone, in whom every individual has an active role to play. That society is built on the fundamental values of fairness, equality, social justice, human rights and freedoms, as well as on the principles of tolerance and recognition of the diversity." According to UNESCO, any society with these characteristics should incorporate mechanisms that enable citizens to participate in decisions that affect their lives and ultimately, their common future (UNESCO, 2012).

This definition is consistent with the basic elements that Sen (2000) identifies for an inclusive society, which he defines as the one where there is a widespread sense of shared life experiences, active social participation, equal opportunities and universal enjoyment of basic levels of wellbeing.

According to Cobigo *et al.* (2012), we can say that the concept of social inclusion is closely related to the "full and fair access to collective resources and activities; the maintenance of social relationships with the family, friends and acquaintances, and the developing of the sense of group belongingness."

¹ This document was prepared to be presented at the international workshop on "Measuring Social Public Policies: Inclusiveness and Impact" to be held at UNESCO in Paris, France on March 25th and 26th, 2013.

So defined, social inclusion is a natural enemy of poverty, which hinders the satisfaction of basic needs, prevents exercising human rights and limits the horizon of people's participation in society, either as an individual or as social group.

In this sense, an agenda for social inclusion should include an aim to poverty reduction that, in compliance with the obligations of the State, ensures access to all people, at any time, to at least, some minimal resources for the exercise of rights. Not taking into account those components implies limitations in the participation of individuals and backwardness communities in the procurement of daily subsistence limiting the possibilities to display her/his personal and collective capacities.

Regarding the Mexican experience, particularly the contribution of the Consejo Nacional de Evaluación de la Política de Desarrollo Social (National Council for Evaluation of Social Development Policy), CONEVAL, it is relevant to mention the efforts to consolidate a social inclusion agenda in the country and the generation of valuable information for the design, implementation and evaluation of the strategies aimed to reduce poverty and inequality.

CONEVAL was created by the General Law of Social Development (LGDS) in 2004. It has two substantive functions: 1) to generate the criteria and guidelines for the definition, identification and measurement of poverty, and 2) to evaluate the social development policy for the country (DOF, 2004).

The LGDS states that the measurement of poverty must take into account a multidimensional approach that includes at least the following elements: i) income, ii) educational gap, iii) access to health services, iv) access to social security, v) quality and living spaces in the dwelling, vi) housing access to basic services; vii) access to food, and viii) the degree of social cohesion (DOF, 2004).

These considerations acknowledge that in any economy based primarily on monetary exchanges, income is a key element for acquiring basic goods and services. Moreover, it also recognizes other equally important aspects associated with the individuals' ability to exercise social rights. As such, its fulfillment does not rely only on individual responsibilities, but also the State's capability to promote and guarantee them.

The methodology for measurement poverty developed by CONEVAL was officially approved in 2009 (CONEVAL, 2010). Being multidimensional, it has some attributes, for instance: it links two areas of development, the space of economic wellbeing - through income- and the space of social rights, represented by six of the dimensions afore mentioned. Additionally, a third space, the territorial dimension, allows exploring social cohesion within and between states or municipalities.²

Taking into account the relevance of the exercise of human rights in the social inclusion processes, the methodology for measuring multidimensional poverty uses a human rights approach and adheres to its principles, particularly universality, interdependence, indivisibility and progressiveness.

The principle of universality refers to entitlements of rights for every individual under permanent conditions of equality and non discrimination; indivisibility is related to the achievement of a full set of rights without the exception of any of them; interdependence is defined as the impossibility to separate, prioritize or positioned in a hierarchical order one right with respect to any other. Finally, the progressivity principle indicates that the exercise of rights must always be in constant improvement; it means that we are not dealing with a once and for all process that finishes simply with the setting of an specific goal, but that we should keep working continuously to move gradually towards the full and universal exercise of human rights.

The human rights approach in the methodology of measurement poverty in Mexico reflects a trend that has been gaining strength in the country. It is already contained in the Mexican Constitution in its Article 1°, which was reformed in 2011 to establish that all public authorities have the obligation to respect, promote, protect and fulfill human rights, in accordance with the principles of universality, interdependence, indivisibility and progressiveness (DOF, 1917).

Both spaces used in the methodology to identify people with deprivation hold specific criteria. On the one hand, the economic wellbeing space sets two thresholds: the economic wellbeing line,

² Social cohesion is not used in Mexico to identify population in poverty. It allows characterizing the territories based on various approaches to the concept.

equivalent to the value of the income required to meet food -through the cost of the basic food basket- as well as non food basic needs, and the minimum wellbeing line, which equals the cost of the basket food only. This last line identifies people that, even using all their income, would not be able to satisfy their nutritional requirements (CONEVAL, 2010).

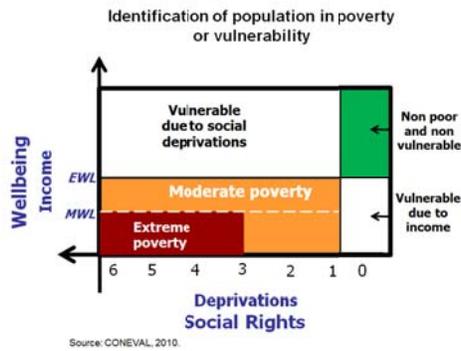
The space of social rights is composed of six dimensions or social deprivations: educational gap, access to health services, social security, quality living spaces in the dwelling, housing access to basic services and access to food. In this space all dimensions are, conceptually, equally important and, therefore, the same weighted is assigned to them due to the principle of the indivisibility of human rights. That is the reason why deprivation in at least one of these indicators makes evident a precarious situation in the exercise of social rights.

Intersection of economic and social space deprivation defines a person in poverty. The methodology developed by CONEVAL considers a person as poor if his/her income is insufficient to meet their food and non-food needs and, simultaneously, if he or she presents one or more deprivations in the social space. Likewise, an extreme poor person is the one who has an insufficient income to pay for the cost of the food basket and suffers from three or more social deprivations (see Figure 1).

The methodology also allows the identification of other groups who are not necessary poor but have characteristics that puts them in vulnerable situations. Thus, it is possible to distinguish population with enough income but one or more social deprivations (vulnerable by deprivations) and population with no deprivations in the space of social rights, but with an insufficient income to meet their basic needs (vulnerable by income).

Finally, in Figure 1, the methodology also distinguishes a segment of population without social deprivations neither income problems (non-poor and non vulnerable). Directing people to that quadrant must be one of the central objectives of social policies because it is exactly there where people have sufficient and equitable access to economic and social resources and where social inclusion processes can be strengthened.

Figure 1.



However, as seen in Figure 2, only one in five people in Mexico (19.3 out of 112.6 million inhabitants) was in that situation in 2010. In contrast, almost half the population (46.2%, 52 million) is poor; 28.7% (32.3 million) are vulnerable due to social deprivation and 6% (6.5 million) are vulnerable due to income.

Between 2008 and 2010 Mexico showed significant progress in reducing the percentage of population with different deprivation as consequence of the increase in the coverage of various basic social services. However, given the financial and food crises that characterized this period, the percent of the population with insufficient income increased. During this time, and as a consequence, the lack of access to food indicator also increased (Figure 3).

Figure 2

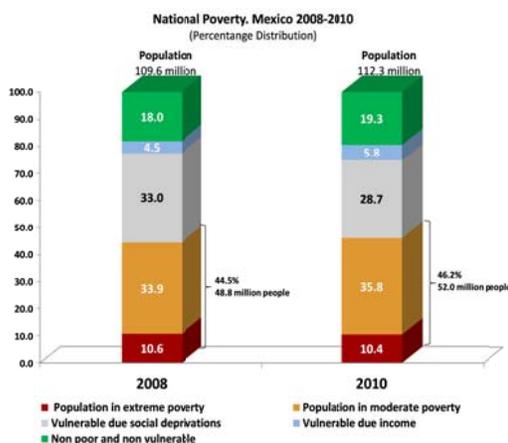
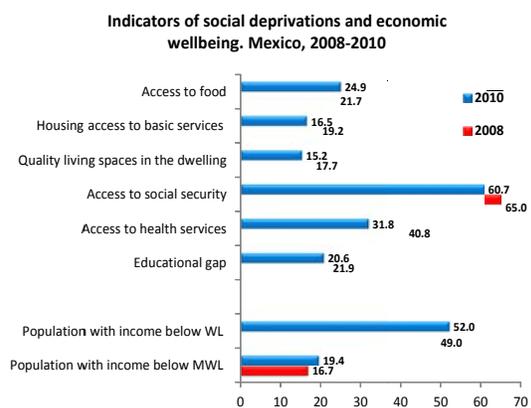


Figure 3



Source: estimations of CONEVAL based on the MCS-ENIGH 2008-2010.

As it can be seen, the methodology for measuring multidimensional poverty identifies population living in precarious scenarios and conditions of vulnerability. The results presented highlight not only the population objective for public social development policies, but also the dimensions on which public action should intervene and what policies should be implemented -economic or social, universal or targeted- for specific dimensions.

Another contribution of the measurement of poverty in Mexico for the analysis of social inclusion is the measurement of social cohesion. Both concepts share some contents and applications, particularly in the field of social policy. Although the methodology developed by CONEVAL does not incorporate this dimension for the identification of the population in poverty or vulnerability,³ it does allow characterizing population living conditions in relational terms.

The approximation that the methodology for measuring poverty proposes for the analysis of social cohesion considers the following four indicators: the Gini index (based on income distribution), the ratio of income among the richest with regards to the poorest people, as an approximation of economic inequality, a social polarization index, and an index of social networks (CONEVAL, 2010).

Our poverty estimates show segmentation of the population across different economic and social deprivations, which all together can be seen as reflecting an unequal access to resources and wellbeing conditions among the population. Those seem to be important obstacles to progressively build an inclusive society.

The social inclusiveness framework presented here aims that everybody in Mexico has enough income to satisfy their basic needs and does not experience any social deprivation. However, we should take into account that nowadays only one fifth of the population locates is in that situation. This reflects the great challenge Mexico faces for the improvement of quality livings conditions.

³ This is so for two reasons: social cohesion is an attribute of communities, not individuals; so it breaks the principle of universality in the measurement. Because of that, it cannot be attributed to any particular person. On the other hand, it is assumed that the relationship between poverty and social cohesion has mutual impacts, so that some degree of social cohesion cannot be associated uniquely with higher or lower poverty levels.

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