

TRENDS AND TRANSITIONS IN MEXICAN SOCIAL POLICY*

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The objectives of this paper are to discuss the way in which social policy studies have developed in Mexico from a perspective of social policy models and their institutions; and to define some problematical aspects of such focuses. Also, I present the diverse arguments on the main characteristics of present Mexican social policy, in contrast to that of the ISI period. This article especially highlights some of the most important problems in the research about the Mexican Social Policy the lack of knowledge about the "hybridization" phenomenon of trends, conflicts within the social institutions, the disdain to the social actors, the contempt for local-regional differences, and the simplification of continuity-discontinuity dynamics in the present social policies. In this paper, the transformation process of the Mexican social policies is revealed as a complex reality, far beyond binary conceptions.

INTRODUCTION

Social politics is under discussion in Mexico, and researchers are more and more concerned with investigating it. Public officials promote reforms, and civil social organizations get into the act more noticeably. Today, social policy is the field of debate on traditional models now in practice and proposals for reform from the different political and ideological viewpoints. The initiation of a typically-targeted project, the Education, Health and Nutrition Program (PROGRESA, for its title in Spanish), aimed at the extremely poor, raises questions and arguments. It could hardly be otherwise with a program that modifies the way that the government responds to extreme poverty, and that goes to more than three million households at the end of 2001.

In Mexico, as in other Latin American (L.A.) countries, the prevalent discourse on social policy had a universal leaning (never completely realized),

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that was expressed in different ways during the Import Substitution Industrialization (ISI) years. It now includes a new targeting proposition that has been imposed in the 90's, along with the social reforms driven forward by the State, within the new open-economy framework.

The social sciences are an expression of this debate. Researchers attempt to remodel their approaches to the social institutions' practices and to analyze the specifics of Mexican social policy. In Mexican social science literature, there are several different characterizations of social policy; however, we can highlight those of Duhau (1997), González de la Rocha (2000), Farfán (1997), Gordon (1999), Laurell (1996) and Warman (1994). These writers speak of both a traditional model and of a new one that is adjusted for the reformed economic policies. Other authors like Raczynski (1998) and Franco (2001) analyze L.A. models in general. Raczynski speaks of three possibilities: the "old model", the "neoliberal" and the "emergent"; Franco limits himself to the "dominant" model, that emerged in the era of the ISI, and to the "emergent" model; Gordon (1999:49) refers to the "universal" model and to the model supported by "economic liberalism".

Emilio Duhau (1997) tries to define the traditional social policies, and speaks of a limited social security State, of a fragmented universalism or — together with Sara Gordon (1999) — of a stratified universalism. Filgueira (1997) compares the stratified universalism model (Uruguay, Chile and Argentina) to the Mexican and Brazilian situations, which are listed as dual models (combinations of universalization and exclusion). Warman (1994), in the official social balance of the Carlos Salinas administration (1989-1994), speaks of the social policy of building a "Welfare State", from the 1940's up to the beginning of the 1980's. Ordoñez (2001:63) judges that Mexico is still "far from the characteristics that define Welfare States, even those that are considered to be stragglers in the framework of the advanced capitalist democracies". Laurell (1996:18 and 22) refers to the social policy of the "post-revolutionary social pact" and to the "regressive" social reform that leads to a "neoliberal social policy regime".

Some authors rightly avoid reductionist conceptions of all of a social policy's actions, according to only one model's logic. Social policy programs are social processes in which we can hardly expect to find these models in any pure state (González de la Rocha, 2000). The various social policy practices have been invented solutions in the course of historical processes, within the framework of national and international problems and of diverse ideological influences. Many actors are expressed in them; often actors who have conflicting platforms (Moreno, 2001). To analyze only from the global-discussion perspective may leave one at the surface, without recognizing

the internal currents that are generated in social policy practices. The re-emergence of social issues in L.A. requires, therefore, comparative works which allow an individual understanding of each national experience; it needs a study of the actors and practices that transcends or adds dimensions to the discussions.

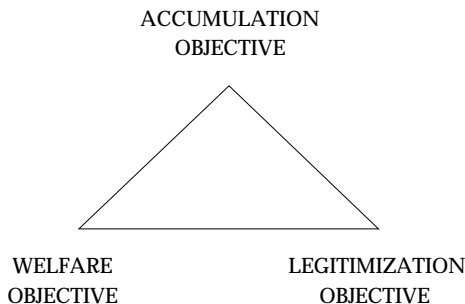
In this work we will discuss, first, the way in which social policy studies have developed in Mexico from a global perspective, or in other words, from a perspective of social policy models and their institutions. Second, we will attempt to define some problematic aspects of these focuses, in order to contribute to the discussion; we intend to provide input for a broader debate. Third, within this problematic framework, we will try to present the diverse arguments on the primary characteristics of current Mexican social policy, in contrast to that of the ISI period.

A STUDY OF THE SOCIAL POLICY MODELS IN MEXICO

The application of the logic of models in the study of social policies can be diagrammed with three objectives in mind. From our point of view, all social policy includes goals which we will label: accumulation (supports the existing economic model), social welfare (improves living conditions for the populace) and legitimization (supports the political regime, creation of citizenship).

In general, the study of social policy in Mexico has emphasized some of these poles and, in many cases, has disregarded or neglected a more comprehensive perspective. Naturally, one may find works that include the three extremes, though they do so in an embryonic way, lacking a neat methodological distinction. We point out the following emphases:

1. The emphasis on the study of social policies that “distort” or negatively affect markets and that thus damage the strength of the economic



model. A. Atkinson (1996) points out that many economists have resorted in various ways to this *negative orientation* of social policies, and that little effort has gone into *positive* consideration of social policy's contributions in the economic sphere. This negativistic perspective has also developed in Mexico. For example, it appears in the old debate between "capitalizers" and "social reformers" (Valencia, 1998),¹ and more recently in the criticisms from the market stance of the old social policies (Levy, 1994). Several authors consider the positive as well as the negative theoretically, but they end up highlighting the latter (Solís Soberon and Villagómez, 1999). Another group of investigations favor the study of social policy linkage with a Keynesian/semi-Fordist economic model. It deals with Mexican social policy as working according to the substitutive model, which allows the creation of a virtuous economic circle (Székely, 2001). In all these cases, one can discern the priority given to the objective that we have called "accumulation".

2. The rupture of the economic policies of ISI from that of market reform, and their relationship to social policies, was the origin of a good number of texts. At times, there has even been talk of a new targeting and privatizing model in Mexico, in this case conforming with the new economic process (Laurell, 1996; Soria, 2000). In many of these cases, the "accumulation" pole is again favored, and the others are neglected. As in the above paragraph, the perspective from which the social policies are analyzed is that of privilege or preeminence for economic factors. Pro-targeting and anti-targeting adherents can agree on an in-depth economism perspective.
3. A central interest in institutional aspects, during examinations of social policies, created a considerable number of works that include the Welfare State concept. This generally appears in long-term studies (Murai, 2001; Ordóñez, 2001). In the dialogue with European studies, it settled upon the incomplete nature of the Mexican Welfare State, or upon a Social State characterization arising from the Mexican Revolution. From another point of view, some studies were aimed at questioning State intervention, not just in the general economy, but also through social institutions; the liberal revision of the State's role was also included in social policies (criticism of social statism) (Levy, 1994). Recently, the debates on globalization and nation-states lead us to

¹ "Capitalizers" were those who defend the priority of capital accumulation in order to achieve well-being. "Social reformers" were those who prioritize distribution, during the ISI period in Mexico.

revise the boundaries and possibilities of national social institutions (Cordera, 2000). This time, the attention is centered on the “welfare” objective, and on its institutions, although it remains within the generalist view.

4. Concerning the centrality of social institutions and of their coverage, in a sectorial perspective, historical focuses were created on the provision (or non-provision) of basic needs, and the creation of institutions and policies aimed at them. Derived from global interest in the incomplete Social State or Welfare State, many studies specialized in sector perspectives: educational institutions and educational delays or advances; healthcare institutions and sanitary conditions; social security institutions and coverage or absence of security; nutrition and housing institutions and policies, and nutrition and housing indicators.² An inductive, analytical view of social practices settled upon the conflict between the universalist discourse of Mexican social policies and their segmented/fragmented reality; the making of winning and losing regions for social institutional coverage, and for participation in new social programs. The weighting of the coverage, of the inclusion and exclusion dynamics of public social institutions, gave root to the assistance/philanthropic practices (linked to/segregated from universalist-leaning social institutions) (Lautier, 1998), something which is certainly insufficiently researched in Mexico. The “welfare” objective is emphasized, though only from specific social institutions.
5. Social policy may be viewed from the political standpoint. Especially in the second half of the 80's, inquiries into Mexican democracy initiated works on the political use of social policy (Cornelius, 1994; Dresser, 1994; Ordóñez, 2001; Preciado, 1997; Ward, 1989). The historical focuses favored corporative and/or populist approaches to the model during the ISI period. The limitations found in the corporative system, within the framework of significant exclusions of Mexican populations, above all in the rural sector and in the suburbs, encouraged studies of the new forms of legitimization that were sought by governments concerning new programs for the poor. These ran the gamut, from the Public Rural Development Investment Program (PIDER), begun in 1973, the General Coordination of the National Plan for Depressed Areas and Marginal Groups (COPLAMAR) in 1977 and the Mexican Nutritional System in 1980, to the National Solidarity Program (PRONASOL), which started

² Sectorial articles may be found in Cordera and Ziccardi, 2000; Barba and Valencia, 1997; Ramírez López, 1999; Solis and Villagómez, 1999; and Warman, 1994.

in 1989. Emphasis was placed upon the crisis in the corporative model, started in 1977, and on the new clientelism/populism processes. In these cases, the objective that we have called “legitimization of social policies” was favored.

6. The primacy of politics has also provoked a new generation of investigations on the concepts of citizenship and social rights. In the same way that an incomplete Welfare State and discursive universalization was spoken of, the comparative studies reach a conclusion of a deficit in citizenship in the application of social policies. The individuals covered by social action were covered as a controlled population, or clientele, of the authorities in power at the time, and not as citizens who had social rights which could be demanded. Social services have been considered to be more like something that the State decides and grants than as something the citizen claims (Gordon, 2001, and Lautier, 1998).
7. In recent years, a reorganization of the typologies has been sought in social policy studies — some of which would theoretically include the above-mentioned three objectives — and the inclusion of new theoretical perspectives having comparative concerns or normative focuses. This was meant to place the Mexican situation within the broader study of social policy. Without attempting an exhaustive proposal, we offer the following examples which enumerate theoretical positions in a few divergent cases:

- A. The consideration of inductive proposals based upon a group of characteristics studied in different countries, such as those of Raczynski (1998) and Franco (2001), and of some writers who describe the Mexican fragmented universalism and the new emerging policies. The following characteristics are considered:
 - The general goals
 - The role of the State (its relationship to the market and civil society)
 - The participation of civil organizations
 - The logic used in decision-making
 - The relationship with economic policy
 - The extent of social security, and the fragmentation and sectorization of the social security system
 - The target population (universalism and targeting)
 - The methods used to deal with poverty
 - The forms of financing and the criteria for assigning public expenditure

Vilas (1995) includes one more element:

- The supporting political coalition

And in this work, we propose yet one more:

- The model's inherent risk of social break-down

In this work (following chapters) we will present the various characteristics of Mexican social policy in recent decades, based on this scheme.

- B. The consideration of proposals which analyze national cases and which, seek "ideal types" of social policies, such as Esping-Andersen's (1999, 2001) examination of the three models, or the minimalist residual Welfare State based on targeting policies, which is the most similar one to the market; or the Welfare State that offers universal coverage and seeks to exclude the market from lending social services; or the social security system linked to employment and in addition to family care. Mexican social policies may be located between the corporative model (social security linked to labor and controlled by corporations) and the minimalist residual model (important sectors excluded from the former scheme and left to the market and to discretionary clientelism, such as poor peasants, and informal laborers in urban and suburban areas). Boltvinik (2001) highlights the similarity of the new social policy discourse with Esping-Andersen's minimalist residual model.
- C. Addition of genetic-historical propositions to the social protection model. B. Lautier analyzes the formation of European social protection models based on nuclei (workers in the military and civil public functions, and in large enterprises). Social protection will gradually be generalized through Bismarckian, Beveridgian or hybrid avenues, though they will remain social assistance "seeds". For L.A. (including especially Argentina, Brazil, and Mexico), Lautier points out a process that is also built upon nuclei, but is limited in its generalization. The L.A. salarization did not reach the European level. The principal initial nuclei were the public and private sectors (state officials, and workers in strategic branches and large firms which produced for the domestic market). Policies of import substitution allowed the creation of these nuclei. The adjustment in the 80's and 90's has not managed to eliminate these nuclei, although it has crippled them so that now they appear surrounded by a group of precarious workers in both the public and private sectors (for example, subcontracted people). In concentric circles, and ever further from the main nucleus and its protection, Lauthier shows in ascending order Crown 2 (which forms the second part of the concentric circle scheme) comprised of precarious salaried people, Crown 3 composed of stable unsalaried people, Crown 4 made

up of unstable unsalaried people and Crown 5 composed of inactive people. In each crown, there are those who are excluded from assistance, what the author calls "the no-man's-land" between social protection and social assistance. The author considers Mexico's situation to be typical of this creation of principal nuclei, associated with several "crowns" in which there are people excluded.

- D. Discussion of the "normative" market focus. The World Bank (De Ferranti, 2000:37-44) presents an analytical proposal based upon how individuals or families behave when faced with risk: self-insurance (transfer income in good times to deal with bad times) and self-defense (reduce the probability of bad times coming). Social policy's responsibility begins when people have reached their limits of self-insurance and self-defense. The World Bank analysts distinguish between market insurance, which implies joint coverage of market risks and prices, self-insurance (with its imputed price) and self-protection. From this viewpoint, centered on the individual, the "need for government arises only where markets fail and the social policy formulation is based on minimalistic and not ad hoc principles". Thus, social security may be considered to be a complementary policy to re-enforce market insurance. Obligatory savings systems are a policy to re-enforce self-insurance, and social protection is a policy for increasing self-protection which is justified only if the markets do not suffice to provide optimal self-protection to people or families. "Policies to facilitate the acquisition of human capital (better health, education, and training) may constitute the core of social protection". In Mexico, the World Bank analysts highlight the role of PROGRESA as a model of re-enforcement for individual self-protection, and from their point of view, the need for "minimal" social policy that is only complementary to that of the market.³

PROBLEMS IN THE STUDY OF MEXICAN SOCIAL POLICY MODELS

Social policy studies based on the consideration of different possible models and the debates generated have provided valuable elements for building what we call "ideal types". They have allowed an understanding of the diverse logics of social policy. They have also permitted the initiation and development of comparative views on the national level (between different

³ The World Bank's proposal for a new generation of social policies in Mexico is found in Giugale (2001).

periods) and, to a lesser extent, on the international level. However, without denying the contributions of these studies that have developed in the last twenty years, we believe that the following problems have continued or even intensified:

1. Models may tend toward simplifications that accentuate one pole of the social policy objectives triangle. For example, in the Solidarity years (1989-1994), political-style studies were predominant. In consideration of the adjustment policies, the economic focus ("market" deficiencies in social policies, or contrarily, criticism of economic market reforms) has been favored. In those years, the studies that held sway were those postulating a lack of linkage between social policy and economic policy in the new forms of targeted action. An amplification of the debate is required in order to include the study of citizenship and social policy. Also needed is an analysis of how, from a market standpoint — and specifically with the concept of human capital as a starting point — linkage is suggested between social and economic policies.
2. Simplifications may make us ignore "hybridization" phenomena in the operative, or real, models. Particularly, deductive views can favor this lack of attention. Though we may speak of the existence of dominant tendencies in social institutions (which is what leads us to characterize models), there are historical processes comprising mixes of differing elements or tendencies. Another point in the debate about programs that confront poverty is centered on the targeting model, as if it were the only one there is, and has ignored the hybridization process in practice.
3. Inductive viewpoints, for their part, can fall into simplifications that accentuate the individuality of national social policy, without placing it in the international context. Paradoxically, the inductive stand may lead to a failure to recognize the individuality of national social policy in the international context. For example, it may view the privatization of Mexican social institutions as a process that was taken to an extreme, without comparison with other trajectories.
4. Characterizations of social policy can fall into simplifications which tend to postulate a coherent whole, and which ignore debates within the social institutions, such as the social actors and conflict within these institutions. The actors of the dominant side are not the only ones in the State apparatus.
5. The study of "national" models of social policy can make an abstraction of the local-regional and sector differences (referring to social institu-

tions and their uneven development). It is necessary to add to the study the great variety of local-regional social policies that are the product of decentralization processes, of local-regional and national political changes (governments of different parties), and of the historical trajectory of the locale or region. There are curreating state and municipal governments in Mexico from each of the major political parties, with varying points of view.

6. The construction of the models can lead to simplifications that fail to take into account the dynamics and transformation processes of social policies. They generally favor the "great changes", without studying the transitional processes of social policy, and their elements of continuity (previous models and their institutions) and of discontinuity (new models and the emerging institutions). A study of the continuities and discontinuities would allow us to take into account a genesis or incubation period for the changes. For example, the intended domination of the targeting scheme also ignores the existence of continuity-discontinuity.
7. The changes of the discourse are deeply analyzed while little is done with the practices of social institutions. A typical case is the debate on the reduction of the State's social role, which is almost taken for granted simply because of the domination of the discourse, without studying the new configurations of the State.

THE DEBATE ON SOCIAL POLICIES AND THEIR TENDENCIES IN MEXICO

With the simple methodological precautions indicated in the previous chapters, we offer characterizations of Mexican social policy of recent years, and some of their supporting arguments. They may be studied according to the following elements: the role of the State (its relationship to the market and to civil society) and the logic that guides decision-making; the general objectives; the relationship with economic policy; the reach of social security; the target population (universalism or targeting); the fragmentation and sectorization of the system; the methods of reducing poverty; the financing for the programs (as well as the criteria for assignment and level of public expenditure); the political coalition that supports a given model of social policy; and the inherent risk of social breakdown. As we indicated, characterizations of Mexican social policy should include the "triangular" view, the "hybridization" and "continuity-discontinuity" processes, and the active presence of both old and new actors.

The Traditional or “Domestic Market” Model of Social Policy

What are the characteristics of social policy in the substitution period (ISI)? *The role of the State* is preeminent; in this State domination there is little room for private markets or community and civil initiatives. The logic guiding decision-making is bureaucracy (Duhau, 1997; Gonzalez de la Rocha, 2000), with *top-down* authoritarian methods and a centralism with a certain hint of influence from corporations of groups and interests (Gordon, 1999: 55 and 57). The central power set norms, financed, and executed social welfare institutions programs and actions (Duhau, 1997). This centralism led to standardized programs throughout the country, with little adjustment for specific regions. Therefore, social policy within this framework was a State affair (González de la Rocha, 2000) and not an issue of the society. However, the central role of the State was not total. Faced with its inability to create policies that were truly universal, different strategies — or simply individual survival responses — were generated by individuals, communities or regions to solve their social problems. These strategies or responses have given root to an entire literature on survival and social networks.⁴

The global objectives of social policy are several, in this traditional model. A first objective is the resolution of first-magnitude social problems, inherited from the old colonial structures. A second objective is the construction of the Nation-State, which Barba (1995), Vilas (1995) and Ward (1998) call the integrating and legitimizing function of social policy (support for organizations that are considered strategic, in order to conserve or feed legitimacy). A third objective is the support of industrialization (Farfan, 1997 and Székely, 2001), especially with the formation of a working class with at least partial social guarantees (Soria, 2000). Not all of the periods gave equal importance to these three objectives. For a long period, the concept predominated that growth associated with the Bismarckian scheme of social security would generate well being. The basic priority was growth and accumulation; well-being would be its corollary (Valencia and Aguirre, 1998 and Ordóñez, 2001).

There is argument concerning *the relationship between traditional social policy and economic policy*. While Raczynski (1998), in his general analysis of Latin America, highlights the relative lack of linkage between the two, Barba (1998), Boltvinik (1996), González de la Rocha (2000), Valencia (1995) and Vilas (1995) highlight the strong economic policy — social policy rela-

⁴ See, in this issue of *Development and Society*, Rocio Enriquez article. Concerning social policy's vacillation regarding indigenous peoples, see De la Pena (2000).

tionship, above all through the employment and salary policy. The citizen, through salarization growing, constitutes himself socially in the job and in an inclusion in the security mechanisms (Barba, 1998). In a domestic market economy, the emphasis is placed on protection of salaried people and on the creation-consolidation of the middle classes, to support the demand for nationally-produced goods (Székely, 2001). To Vilas (1995), this linkage between social policy and economic policy constituted a preventative scheme, an *ex — ante* attention to poverty.

The activities of welfare and social security institutions cover only a limited part of the society, in certain categories. For example, they are limited to workers in the formal sector, registered in social security programs. This is due in part to the fact that the assignment of resources is guided by the pressures of organized groups, notably powerful unions in strategic industrial sectors, in the bureaucracy or in the military machine.⁵ There is advancement of social services coverage; however attention to the least favored is delayed, above all in rural areas (see Duhau, 1997; Farfán, 1997; Levy, 1994; Vélez, 1994). These limitations in the social security systems, for decades, have led the poor to seek various ways to survive (see Ward, 1989: 23-28) outside of formal markets. These have been closely studied by Mexican anthropologists.

Political considerations made universalism primarily an aspiration (or it became nominalism), and was limited to organized urban residents (Duhau, 1997; Román and Aguirre, 1998; Schteingart, 1999; Vilas, 1995; and Ward, 1989). In spite of the preponderance of universalist discourse (González de la Rocha, 2000), targeting aspects would inevitably be present, for example through the institutions that care for those excluded from the labor market (Lautier, 1998; Román and Aguirre, 1998).

A fragmentation in the creation of different systems is neatly expressed for workers in private enterprise, public workers, military personnel and government workers (Duhau, 1997). The greater the political power of a sector, the greater its social security benefits. Concerning the rhythm of inclusion, health system coverage first increased in the 60's, 70's and 80's (more slowly in this decade), and was reduced in the first half of the 90's (Boltvinik, 1995; Laurell, 1996:20; Murai, 2001; Ordóñez, 2001). A matrix can be made of the welfare system by social groups and sectors.

The educational system is typical of the universal characteristic, as is the healthcare system to a lesser degree (Duhau, 1997; Gonzalez de la Rocha, 2000; Román and Aguirre, 1998; Ward, 1989), though Filgueira (1997) rightly

⁵ For example, see the groups with special pension systems (note 13).

TABLE 1. FRAGMENTATION AND SECTORIZATION OF THE WELFARE SYSTEM

Mexico's Case						
	Universality	Bureaucracy	Military	Large Unions	Farm Workers	Unsalariated Urban Masses
Health	Tendency	XXX	XXX	XXX	Weak	Weak
Education	Tendency	XXX	XXX	XXX	Weak	Weak
Pensions	Partial	XXX	XXX	XXX	Nonexist.	Nonexist.
Nutritional	XXX	XXX	XXX	XXX	XXX	XXX
Housing	Partial	XXX	XXX	XXX	Nonexist.	Weak
Unemployment Insurance	Nonexistent	Nonexist.	Nonexist.	Nonexist.	Nonexist.	Nonexist.

Source: Original research.

Notes: Although education has been free, the poor among farm workers and the unsalaried urban sectors have difficulty reaching secondary, middle-upper and upper educational levels. In housing, support programs like FONHAPO have been developed for the urban poor. In nutrition, we refer to general subsidies on prices (supply subsidies).

The XXX sign indicates "actual".

points out that universality is limited to primary education. Social policy included universal nutritional support through subsidized prices. In Mexico, the public enterprise *Compañía Nacional de Subsistencias Populares*, CONASUPO was very important in this regard.⁶ Traditional social policy emphasized the development of some sectors of the social welfare system, which led to underdevelopment (for example in housing conditions) or even nonexistence of some parts of the system (as in the paradigm case of unemployment insurance, shown in the table above).

In *financing*, the state sector is dominant, but without being the only one. Especially relating to healthcare systems and pensions, the so-called triple combination is applied, with the obligatory participation of workers and employers for healthcare and social security.⁷ The assignment of public resources for subsidies occurs through supply mechanisms; that is to say

⁶ In Ordóñez (2001), a follow-up may be seen of the nutritional subsidies policy in the history of Mexican social policy. CONASUPO was created in 1961, though its origins go back to 1938 with the *Comite Regulador de Mercados de Subsistencia*. According to Ordóñez's calculations, in 1983 the expenditure on CONASUPO represented 2.2% of the GDP. Levy (1994) questions the imbalance in subsidy practices and points out that in 1988, half of the nutritional subsidies (900 million dollars) were not targeted for and did not reach extremely poor people. He questions the urban slant of nutritional subsidies.

⁷ Before the reformation of the IMSS (in 1995-1997), this institution's healthcare fund was distributed as follows (triple contribution): employers 8.75%, employees 3.125% and federal government 0.625%, for a total of 12.5% of the salary (OCDE, 1998).

subsidized prices, supported both by general subsidies and those from the CONASUPO public company. Especially before the 1980s and the generalization of adjustment policies, the tendency in the public social budget was toward higher spending. However, in comparison to countries with advanced welfare systems, the Mexican social expenditure is very low. In Ordóñez's (2001) statistical series, the social expenditure rose from 1.4% of the GDP in 1940 to 9.2% in 1982.

What is the *method for confronting poverty* in this social policy model? The main method is "indirect" in nature (Orozco, 1994). That is, the perception is that the best way to reduce poverty is through economic growth, job creation, and the creation of adequate salaries and of worker-protection programs. The growing level of salaried people in the society and the establishment of a social security network for those people would thus resolve the problems of poverty. As Boltvinik points out, salary creation was a promise of overcoming poverty. Although there is no agreement on the indicator to be used for poverty measurement (Hernandez Laos, 2001), some studies concur in indicating a reduction of poverty from the 1960s until the beginning of the 1980s (Boltvinik, 2000).⁸

With respect to the *foundational coalitions of these social policies*, according to Vilas (1995), the State, private enterprise and unions were the political tripod on which a Keynesian-Fordist social policy stood. This also explains the "limitation" of the nominal universalism of social policy (Gordon, 2001). The coalitions of the ISI period were formed by the State in implicit political agreements among parts of the national bourgeois, large segments of the middle classes and the unions. "Domestic market" social policy thus has a strong social legitimacy among the most organized sectors of society, which very probably exaggerated the appearance of the social support that they received. The unorganized sectors could hardly have made their rights and doubts count, until the "new social movements" began to arise.

But this "limited" legitimacy did not make them invulnerable. What were the *risks of social breakdown* inherent in this social policy of the substitution period? The first risk arises from those excluded from the traditional social policy, within the context of the profoundly unequal social system in Mexico. After 40 years since social security's beginning, in 1982 nearly half of the population was excluded and had to seek attention in the private system or in the open social assistance.⁹ This first risk could serve as the back-

⁸ The poverty figures in 1984 are noticeably divergent, from World Bank's 16.6% of the total population to Julio Botvinik's 69.8%, using his integrated measurement (poverty by income and poverty by unmet basic needs). Lustig (1998) calculates an incidence of poverty of 42.4%, using data from the official statistical institution (INEGI).

drop for the so-called social movements of the 60's and 70's, especially those developed in agricultural areas and in the large suburbs. The second risk comes from some sectors within the social policy. They cry out about the insufficiency or deficiency of integration; For example, of the absence of unemployment protection or of the weakness of healthcare systems. Or they question political practices associated with this traditional model of social policy, such as corporatism or clientelism. Some of the frictions point toward the exercise of social citizenship (social rights) against the subjugation of the individual to the organization, strongman or leader. The unions with the most benefits may also create risks for themselves by pushing for greater benefits for themselves, without considering solidarity with the excluded ones. The organizations become unequal "competing groups", Ward (1986:220-222). The third risk comes from authoritarian reactions of the dominant sectors of the political coalitions toward the demands of the excluded groups, or those insufficiently included, or toward claims of the existence of social citizenship. The response could be political authoritarianism, but not that alone; new social policies also arise aimed at the excluded groups. For example, after the Mexican authoritarian response in 1968, the regime sought new legitimizing practices, aimed at the rural poor.

The long period in which this social policy was dominant in Latin America was not without its arguments or new social quests, as the Mexican experience shows. Especially in the 60's, various public officials pointed out the deficiencies of the indirect model, centered on economic growth and unconcerned with the serious problems of the distribution of wealth (Valencia and Aguirre, 1998). This debate was reflected in new public policies that were initiated in the 70's, in which an attempt was made to combat poverty with special programs. These programs included the PIDER, COPLAMAR, SAM and FONHAPO, among others (Campos and Vélez, 1994; Escobar, 1999; Ordóñez, 2001). The accumulated experience in these programs later led to the creation of PRONASOL, during the Carlos Salinas administration. Thus, especially between 1970 and 1982, the "indirect" method of combating poverty was aided by the special programs which gave attention to different groups of the poor, many of them on the road toward a productive outlook. This way, the fragmentary universal programs were complemented by programs of a more targeted sort (Schteingart, 1999). This was a hybridization: a nominally universalistic model (Bismarckian) modified in reality by fragmentation, and embellished by targeted policies.

⁹ See also note 20.

Thus, we have a social policy in which unemployment insurance is nonexistent, centered on universal nutritional activity (subsidies to supply), on universal trends in the education and healthcare systems, and on partial support for pensions and for housing. The most protected social groups are military personnel, bureaucrats and large unions; the least protected are the masses of peasants and the unsalaried sectors of the urban poor.

The New Model of Social Policy, Suited to Economic Restructuring (Opening).

Questioning Latin American traditional social policies did not come particularly early, as compared with some industrialized countries where severe criticism of the Welfare State models arose.¹⁰ In Mexico, until the 90's, no process was begun to reform social policy to conform with economic market reforms; thus Mexico may be in a state of "transition" (Duhau and Schteingart, 1999; González de la Rocha, 2000; Schteingart, 1999; and Valencia and Aguirre, 1998).

In recent years, a governmental search has begun for new social policy schemes (Jarque, 2000; Levy, 2000). It is not isolated, as there is an ongoing debate between various actors in the nation as to the orientation of the social policy reform that everyone considers to be necessary (Valencia, 2001). The World Bank is also fighting for a new generation of social policies (Giugale, 2001). We can summarize the main features of recent and present social policies (1982 to the present), and some of their arguments, as follows:

The debate is centered on the *role of the State*. As Duhau (1997) clearly shows, in the new paradigm, the functions of social policy (financing, design, implementation and control) may be separated, and some of them may be carried out by non-state agents (businesses or civil organizations). The supposed advantage is that the beneficiaries are participating and that the market is incorporated. The new programs include a strong element of, first, citizen participation and, second, of private enterprise involvement (pensions, healthcare services, evaluations) (see the recent arguments in Valencia, 2001). Competition has a central role in seeking efficiency and improvement of service quality (Duhau, 1997). Asa Cristina Laurell (1997) and Julio Boltvinik (2001) label this tendency as the "commodification" of social services. The debate is accentuated on participation of citizens and of civil social organizations in social policies (Canto, 2001; Penso D'Albazio, 2001; Ramírez Sáiz, 2000).

Also, faced with centrality and bureaucracy in the decision-making

¹⁰ This may be seen in Hirschman's useful historical exploration (1991).

processes of the earlier model, decentralization and slimming-down of the State machine now the goal. Regions are expected to gain new importance and room to maneuver in decision-making processes, and business and civil social organizations theoretically would have more space to act and participate therein. Techno-analytical considerations are strongly included in decisions on the selection of target populations (PROGRESA, 2000; Scott, 1998). Mexico's fiscal centralism has been more pronounced than that of other Latin American countries. Since 1996, more active mechanisms for decentralization have been sought for the fiscal resources dedicated to social policy. Initially, Ramo 26 (Branch 26) was created, with one of its funds (Municipal and State Priority Social Development) designed to be handled by municipalities and states. In 1998, Ramo 33 was created. It groups the Ramo 26 resources dedicated to dealing with poverty along with other federal sources, and is composed of five funds. One of these is dedicated to municipal and state infrastructure (Martinez Assad and Ziccardi, 2000). However, *the top-down* process of decision-making has not been overcome, especially in programs aimed at extreme poverty, which are still centralized. And conversely, there is a tendency toward decentralization of educational and healthcare services (Duhau, 1997; Raczynski, 1998; Vilas, 1995; Valencia, 2000). Since financial contributions sent to the municipalities and states for social funds are dealt out according to formulas which calculate the gaps of extreme poverty (that is, less-discretionary), the funds continue to be "labeled" by the central government, where the main spending priorities are decided (Martinez Assad and Ziccardi, 2000). Municipalities and regions thus remain in the role of paymasters.

The point, then, is not that the State simply retire from social policy. Economic restructuring and social policy reform need the State; one needs only to examine the role played by the Mexican State in imposing the adjustments. Since the 90's, greater State activism has been seen in the social arena, now with a targeting and decentralizing discourse. The idea is not just to spend less, but to spend where markets need re-enforcement, and where the expenditure needs to be focused. Social spending in 2000 was a little less than 10% of the GNP, a figure similar to that of 1982. The novelty lies in the fact that more than 50% of the programmed spending is classified as social expenditure (Levy, 2000).

The general objectives of social policy today are aimed at relieving poverty, especially extreme poverty (Jarque, 2000; SEDESOL, 2001), and toward meeting the basic needs of the poor. Franco (2001:25) indicates that the new paradigm seeks continuous amplification of social protection, but with "the most needy first". However, the State-legitimizing elements may not be set

aside in putting the new paradigm into action. The new discourse questions the former model's populism and paternalism, and excessive State interference with the economy. Privatization is linked, in the discourse, with social policy. The State should stop taking action that requires the participation of private initiative, to focus on social objectives (extreme poverty). Legitimacy is now sought in market efficiency and activities focused on extreme poverty, in what González de la Rocha (2000) and Franco (2001) label the unequal attention to those who are "socio-economically unequal".

In the new paradigm, *social policy's place in relation to economic policy* is debatable. To some, social policy is subordinate to economic policy (Raczynski, 1998) or is an "addition" Vilas (1995). In the first part of the adjustment, some even spoke of the nonexistence or serious crippling of social policy (among them, see Valencia, 1995). They spoke of a simply, exclusively compensatory social policy. In the new generation of adjustments of the 90's, social policies get into restructuring packages and especially seek fiscal balance, new ways to boost domestic savings (pension systems as domestic savings-boosting mechanisms). They also seek promotion of labor-flexibility policies (initially, salary and collective contract flexibility: the World Bank suggests greater flexibility, Wodon and Vélez, 2001), and training for labor, along the lines of human capital theory (see Román and Aguirre, 1998). Thus, the social policy discourse fits with the global economic restructuring discourse (see the 1998 OECD analysis on the reforms in the Mexican social security system). The problem, according to Székely (2001), is that recent social policies have not changed the basic elements that cause poverty. Boltvinik (2001) proposes an economic policy that is subject to welfare objectives.

The *target population* of the new paradigm is, undoubtedly, the poor segment of society and more specifically, the extremely poor. In fact, this point is one of the most theoretically defended by promoters of the new social policy (Levy, 2000). The dominant discourse in public policy today is that of targeting. Among recent justifications, the errors are pointed out in the traditional model, which was wasted on scattered activities. Its actions were not concentrated on the ideal target population, the extremely poor (Campos and Vélez, 1994; Levy, 1994; Scott, 1998). Faced with this domination, the debates turn toward the new and important errors of inclusion and exclusion in the targeted methods (Cortés and Boltvinik, 2000). As De la Torre (1996:151) points out, "the criticism is valid, that proponents of targeted policies seldom consider the errors of exclusion they are guilty of." Loud arguments also arise on the concept of poverty, its indicators (Hernández Laos, 2001), its determiners and its relationship to economic restructuring

(Boltvinik, 1995, Escobar, 2001 and Levy, 1994). SEDESOL (2001), now under the new Vicente Fox administration, is forming a Technical Committee for the Analysis and Measurement of Poverty, to discuss several of these issues and propose annual measurement.

In the dominant discourse, it is very important to identify the beneficiaries more exactly, or *to develop the technical tools for targeting* (Duhau, 1997; PROGRESA, 2000; Scott, 1998; Vilas, 1995). However, De la Torre (1996) points out that there is no need to set up a false conflict between targeting and universalism. Boltvinik (1996:125) and Román and Aguirre (1998:105) emphasize that, in the combination of targeted and universal policies, assuredly (some one) rule in the actual programs.

The new *leitmotiv* is that *the traditional social institutions* must not be managed according to criteria that are foreign to the market. The trend must be for healthcare, education, pension and housing systems to be managed by private institutions and/or financial efficiency criteria. The IMSS pension system was reformed and individual capitalization accounts were created, managed by private financial institutions (Retirement Fund Administrators) which, by the end of 1999 had 15.6 million affiliated workers and managed resources equivalent to 4% of the GDP (OCDE, 2000).¹¹ The reforms also favor groups of workers being served by private healthcare institutions (through the *reversión de cuotas* system, for example). But Frenk (2000) maintains that in Mexico, there is no discussion of privatization in regulatory capacity, nor of financing for health and maternity insurance (the government contribution was increased six times).¹² For the provision of service, the government favors contracting services with private physicians and hospitals. The authors, as we have seen, are discussing “commodification” (López Arellano and Blanco, 1997).

The amplification of traditional institutions coverage is not necessarily the main element in the discourse; elements are included of expenditure effectiveness measurement and of cost-benefit criteria (Duhau, 1997). But in Mexico, according to the OECD, healthcare system reform seeks to extend the coverage as well as limiting the costs and raising the quality of the services (OCDE, 1998). These are huge tasks! Frenk (2000), and Cercone and de

¹¹ Besides workers affiliated with the IMSS, there are also pension systems for workers serving the State (ISSSTE), for military personnel (ISSFAM), and for petroleum and electrical workers.

In 1997, almost 80% of retirees were affiliated with IMSS (Hernández Licona, 2001). Today, the need for reform in the ISSSTE system is being discussed.

¹² The reform tried to significantly reduce employer contributions to this insurance (see Mussot, 1999; OCDE, 1998).

St. Antoine (2001), maintain the importance of reaching universality in healthcare. In 2001, a popular (public) health insurance was proposed for unsalaried workers; it implied a subsidy to include their families, according to their financial standing. Very probably, a new debate will be started on this concept of universality. A “two-speed” healthcare system could be arranged, with minimal service for the entire population (popular health insurance plus IMSS basic care) and special service, supported by *reversión de cuotas* scheme for the sectors that are able to pay and with private medicine. It could mean a polarizing universality.

According to health authorities, in Mexico practically 100% of the population is covered by basic health services (Cercone and de St. Antoine, 2001:418); a little less than half are covered by the open systems (public social assistance). However, the present Secretary of Health in Mexico, Julio Frenk, admitted in 1995 that beyond the officially recognized ten million inhabitants without access to fixed health services, in reality a third of the population did not have these services because of economic, organizational and geographic barriers (Frenk, 1999).¹³ In spite of the efforts of recent years and the influence of PROGRESA, this breach was hardly closed in just six years. At the beginning of the century, scarcely more than half of the population is covered by social security.

The regions that have been left behind in this area are very important. Recent surveys (1994 and 1997) taken by consultants for the World Bank indicate that Oaxaca’s adult mortality rate is comparable to India’s, while that of industrialized Nuevo Leon is similar to that of several European countries. The mortality rates due to infectious diseases are three times and 2.5 times the national average in Chiapas and Oaxaca, respectively (Cercone and de St. Antoine, 2001:411). According to Boltvinik’s research (2000:593), the proportion of mortality (non-survivors among live births) of the rural poor compared to the urban upper class is 3.07 to 1.

For *financing the programs*, the new paradigm seeks to overcome the dependency on public spending, with a partial contribution from the benefiting sectors themselves or cost-recovery policies (Duhau, 1997). But in Mexico, the social security reforms have increased the State spending. Further, in programs aimed at the extremely poor, the State assumes the financing, often with direct credits from multilateral financial institutions like the World Bank or the IDB. Defenders of State reform and of privatiza-

¹³ And not only. For example, a “study by Bobadilla (1998) demonstrated that a baby born in a SSA hospital [open system] was three times more likely to die in its first seven days than a baby of the same weight born in an IMSS hospital” (Cercone and de St. Antoine, 2001: 420).

tions maintain that one of their main goals is to allow the State to concentrate on its most important social objective, which is to spend more on social institutions, and not necessarily on public enterprises. More than creating an obligatory reduction in public spending, the new paradigm insists on adjusting to budget restrictions.

At least in Mexico, the new criteria have not meant a serious drop in public spending.¹⁴ To support the new pension system and the new health insurance reform, the government will have to contribute 1% of the GNP for several years. Just for the pensions, that could increase to 2.3% of the GNP in thirty to thirty-five years (Solís Soberón and Villagómez, 1999; Cercone and de St. Antoine, 2001).

Providing the necessary *subsidies for the extremely poor*, the tendency is to assign the resources to preferentially support the demand (direct transfers to the poor) and avoid interference with the supply. It is thought that this way the market is distorted less, because the expenditure for the poor will be felt in the market, without price subsidies (Boltvinik, 1996; Duhau, 1997; Gonzalez de la Rocha, 2000; Raczynski, 1998; Valencia and Aguirre, 1998). This is a central factor in the new proposals. In Mexico the issue is notable in the gradual decline and later liquidation of CONASUPO (1999),¹⁵ and in the PROGRESA program of direct transfers to the extremely poor. The price subsidies for basic products have disappeared, with the single exception of some targeted programs of the milk and tortilla subsidies. The new debates are about social effectiveness and the comparison on exclusion mistakes; Damián (2000) argues that the new tendency may have negative effects on welfare.

What is *the method used to confront poverty*? Fundamentally, this involves "direct" methods (see Orozco, 1994:122), that is, the development of specific programs to cover the needs of defined or targeted populations. To adjust the social discourse to the new economic restructuring, a line of demarca-

¹⁴ The behavior of social spending is debatable. According to several authors, social spending was reduced, especially during the difficult adjustment period of Miguel de la Madrid (1982-1988) (Ordóñez, 2001). But Boltvinik and Damian maintain that if an adequate adjustment for inflation index is used, (index of prices for goods and services paid by the government to provide social services, which is basically salaries), it is shown that there was no such reduction. In the social expenditure per person, it would be limited to a -11% drop between 1982 and 1988, and would not have reached -53%, as in the adjustment for inflation of the national consumer price index (Damián, 2000).

¹⁵ Of what used to be part of this institution, there remains only DICONSA (rural area supply stores), LICONSA (for the subsidized milk supply program) and FIDELIST (the tortilla distribution program) (Duhau, 2000). There are now proposals, for example, that the DICONSA stores be closed (Levy, 2000).

tion is added between economic and social policies. Salaries and jobs are defined by the market and are not instruments of social policy. Social programs compensate the defects in the market and must not distort it with supply subsidies, nor with populist or paternalistic activity; the compensation is achieved by “direct” methods. The focalized programs for the extremely poor came to represent 1% of the GDP in 2000 (PROGRESA was one fifth of this expenditure). Approximately 0.5% of the GDP is spent on human capital development programs (including PROGRESA), with the idea of putting the poor into the labor market with more training and in better health and nutritional conditions. Social policy has two sides here: social compensation and investment in the human capital of the poor.

PROGRESA is the exemplary program of the emerging scheme,¹⁶ which at the end of 2000 served about 2.45 million households in extreme poverty in more than 53,000 sections of 2,166 municipalities (www.progresa.gob.mx). ProgresA had more than 2.48 million grant-holders in the primary and secondary systems, which granted more than 2.38 million nutritional support transfers, and which utilized (and utilizes) explicitly the services of “universalist” or “broad” institutions like primary and secondary schools and health centers (those of the IMSS or the SSA).¹⁷ PROGRESA is thus a strictly targeted program *mounted* on universalist institutions (Gendreau, 2000). It is not an exclusively targeted-type program: without the universalist, or “broad”, institutions it could not operate. However, the change relative to the old production programs of regional development and basic infrastructure support, is enormous.

PROGRESA is a program of direct transfers in cash, and conditioned for selected poor households. It has a triple composition by which it seeks a sense of integrity: support for education, health and nutrition, with the goal of helping homes to overcome the intergenerational transmission of poverty. Its general objectives are to achieve a reduction of extreme poverty in the medium term by specially assisting the groups and regions with the greatest economic and social disadvantages, and to support individuals and households during the key moments of their life cycles.

The nutritional component involves a basic monetary transfer to support nutritional consumption and the family’s nutritional condition. The transfer

¹⁶ For a discussion on PROGRESA, see Ciasas (1998), Poder Ejecutivo Federal (1997), ProgresA (2000) and Valencia *et alii* (2000).

¹⁷ In 2001, PROGRESA reached a coverage of 3,142,927 households, located in 68,282 locations — 66,126 rural, 1,911 semi-urban and 245 urban — belonging to 2,315 municipalities in 31 states. In the history of Mexican social policy, there is no institution for nutritional, educational and health support (transfers) that has reached so many rural homes.

is given to the mother or other person who prepares the food, and the support is conditioned upon regular attendance at medical unit appointments. The health component, in turn, involves basic care for all members of the household and the free dotation of food supplements to pregnant or nursing mothers and to children younger than two years old. To promote attendance of all members of the household at the medical units, a periodic schedule of visits is established, according to age and level of risk. And last, the educational component seeks to promote school attendance with educational support in grants for each of the sons and daughters studying between third grade of primary school and the third year of secondary school. In 2001, support also began for those registered in middle-upper education, and reached 260,000 grants for this level of schooling. Support was also given in the form of school supplies. The grants are differentiated, with the highest sums going to girls to prevent them dropping out of school (Poder Ejecutivo Federal, 1997 and www.progresa.gob.mx). The transfers are not an exigible right of the citizens; they are a governmental decision based by on sophisticated tools for targeting. Following criticism about the exclusion mistakes of PROGRESA, in 2001 the Program began its work in urban households.¹⁸

In terms of sociopolitical considerations and *the political coalitions that support the emerging paradigm and the economic restructuring*, the most significant change is that the form of the old, powerful unions' relationship to the State enters a crisis. This boosts new policies with the help of exporting sectors, transnationalized segments of the national markets and, notably, of financial groups. The poor sectors not included in the traditional model are an undeniable issue of social (and partial) legitimacy, and are at least a probable source of voters. It can fall into a *partisan targeting*; it can become an extraordinary cultural medium for the purchase of votes during periods of increased electoral competition. The danger has been so real that the new authorities, since 2001, campaign to impede this partisan focalization (www.progresa.gob.mx). It remains to be seen what changes will come to the political coalition because of the shift caused by the defeat of the PRI in the 2000 elections. The so-called "new social movements" showed the deficiencies and legitimization limitations of the prior social policies. Now the new movements attempt to approach the social clienteles who were set aside before (the extremely poor), or the old clienteles under innovative policies (through individualized retirement methods rather than in blocks, for example). The new social policy discourse also seeks legitimacy in the international arena, with international financial organs and with institution-

¹⁸ See the debate about the exclusion errors in Cortés and Boltvinik, 2000 and Scott, 1998.

al investors who seek emerging markets.

A relevant point is that in the extreme of the discourse on market reform, free play in the market includes the possibility of economic and social self-regulation. The social question in this framework is faced through self-regulation of the natural unbalances and inequalities of the market. The legitimacy sought by this sort of utopia will be market legitimacy, although the hoped-for results may be long-term. In the long run, the market will legitimize; the accumulation of human capital will legitimize. Action on the social question, then, may be reduced to perfecting the market and controlling social unrest that breaks away from the free market. This is an extreme position present — at least in embryo — in Mexican debates.

Still, the plurality of actors and positions in Mexican social policy is a reality. Within the shifting political context (2000-2001), new actors arise and rearrangements are made in the policy's institutions. At the beginning of the new administration (Vicente Fox), it is even clearer that in the State machinery, and in its social institutions, there are not just actors from one line of thought or inclination. For example, in recent studies (Valencia, 2001), we have found that, in addition to those favorable to market reform and social reformists — both close to the PRI — there are public and private philanthropists, humanist currents of the PAN¹⁹ thinking or linked to a kind of social entrepreneurship, "civic" currents from varying origins (social leftist, entrepreneurial philanthropy or even conservative Catholic religious), "welfare" currents (or *holistics* who favor the social welfare perspective), and academic currents (consultants) who are close to one or another of the others, plus the powerful influence of the social thinkers of the World Bank and the Inter-American Development Bank. What is the result of this variety of actors? What effect will they have on social policies?

What are *the risks of social breakdown* in the new social policy practices? We can suggest two hazards. Again, though now with different features, the first hazard comes on the part of those "losers" or excluded from the new model, in conflict with the "winners". Mexico is known for its acute inequality in the distribution of wealth.²⁰ If the economic and social policies

¹⁹ The new ruling party.

²⁰ In the economic growth years, 1963 to 1977, the inequality diminished: the Gini index on household incomes went from 0.523 to 0.496. Between 1977 and 1984, a period in which strong growth was combined with the 1982-1983 crisis, the Gini index continued to fall until it reached 0.456, if we count monetary household income. From 1984 to 1994, inequality grew: the Gini index went to 0.514 and the contribution of the X decil rose sharply in monetary household incomes (from 34.2% to 41.2%). In 1996, the Gini index again declined to settle at 0.489 (Cortés, 2000).

do not attain to reverse the concentration tendencies, the dangers of social disintegration or explosion could become more acute. We do not suggest a mechanical expression of inequality and new “exclusions” in social movements, but conditions are indeed created that are open to expressions of social discontent. The second risk is that of an absence of institutions, with the abandonment of the old social policies. Since the tendency is to leave the solution of social problems in the hands of the market, there is no pressure to create new institutions nor to reach new social agreements. With a few exceptions like PROGRESA, new institutions are not created to deal with social problems, but rather there is a tendency to dismantle or incapacitate the existing ones. Thus the forces that maintain social cohesion may be crippled.

CONCLUSIONS

The processes of reform in Mexican social policy started in the 1990's have generated a new dynamic in social institution studies. The debate has grown. Initially it centered on the confrontation between the traditional social policies of the growth period (ISI) and the reform of the social institutions. This generation of research, at the end of the century, has been very helpful in trying to characterize the transformations in progress. Various studies have insisted on characterizing the present model against the traditional one, emphasizing one of the three dimensions of social policy (economic, social and political). However, some of the most important problems in the focuses of these investigations are lack of knowledge about the “hybridization” phenomenon of trends and about the debates or conflicts within the social institutions, the disdain for the social actors, the contempt for local-regional differences, and the simplification of continuity-discontinuity dynamics in the present social policies.

The new research attempts to overcome these limitations. In the study of social policy change from the traditional schemes of the ISI period toward one that is better-aligned with the economic liberalization, phenomena are discerned of “hybridization” and coexistence between institutions of the old and the new schemes, between the institutions with universalistic leanings and those that try to include individuals in the market. The intended new role for the State is analyzed (attention targeted on the poor, with activities that do not distort but re-enforce the markets), and the hypotheses of a simple retirement of the State and of a drastic drop in the social expenditure are overcome. The relationship between economic and social policy reform are studied, together with the new concept of State social activity as an invest-

ment in human capital. The reforms are examined which were attempted in the social security institutions. Those that favor private enterprise participation, and that foment debate on the “commodification” of social services and the possibility of universalizing access to some services were reviewed. The new PROGRESA program is discussed, as it seeks to renew State activity for the extremely poor through direct transfers, or demand subsidies. Changes are discerned in the forms of the subsidies and the preference for demand subsidies as opposed to supply subsidies (prices on basic products), which practically disappeared. New processes of social exclusion, the poverty growth in the 1980’s and 1990’s, and the weak creation of new social institutions are studied. The changes are analyzed in the present hybrid social policy support coalition, now faced with a crisis in its relationship with the unions and with the search for legitimacy in the view of the new “clienteles”; those who were abandoned in prior schemes, like the extremely poor in the rural sector. There is argument about the deficiency in citizenship creation, in the context of the new direct-transfer programs. A plurality of actors is found in social institutions, who argue about the orientation of social policies.

In summary, the Mexican social policy’s transformation process is revealed as a complex reality, far beyond binary conceptions. This transition requires a new generation of investigations that search deeply into the indicated elements. Dynamism demands a broader perspective that surpasses simplistic binary conceptions. Fortunately, a good number of Mexican researchers are blazing the trail toward this perspective.

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