

A CENTURY OF SOCIAL REFORMS IN MEXICO: HISTORICAL BALANCE AND PENDING CHALLENGES

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ABSTRACT

This work offers an analysis of the formation of the Mexican social state taking as starting point the original text of the 1917 Constitution. For this objective, we present a review of the main reforms implemented over a century by the federal government, giving emphasis on social policies and programs that have marked the development of four major periods of history. Starting with the first Constitutionalist government and culminating with the last two administrations that emerges from political alternation; the conclusions ponder about the scope of the current social protection system, accentuating the conditions of exclusion and poverty prevailing in Mexico, as well as the proposals of the government in progress and the challenges to be faced to move towards an inclusive and solidary social policy.

KEY WORDS: Social State, Social Policies, social backwardness, poverty, Mexico

INTRODUCTION

Almost a century ago the Mexican government was formally established as one of the first in the world to adopt the basic principles that defined the social state of law. It was precisely on February 5, 1917, with the enactment of the Constitution of the United Mexican States, when a model of nation was institutionalized, opposing to the fundamentals of *laissez faire*, *laissez passer* dominant at the time, which gave the public authorities the power to intervene in virtually all aspects of economic and social life of the country, with the central aim of reducing inequalities and promote social justice. Taking as a starting point this

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founding event, in this work we propose a trip through history, accentuated on the reforms that have marked the development of social policy as well as the major challenges, that still remains, to reach the construction of a welfare state that guaranteed the full exercise of social rights to almost all Mexican society that are still outside of the development's benefit.

To accomplish this task, we look at the greatest amount of available documentary sources (legal, academic and statistics) in order to incorporate into the analysis the most important factors that explains the logic of public intervention, particularly in the construction welfare policies. Policies that were included, allude to all areas of social intervention considered as a state responsibility in nations with advanced welfare systems; that is to say, basic social services (education, health and houses), social security (pensions and work is -related insurance) and assistance to marginalized groups.

To address the objectives outlined, the work was divided into three main sections: the first explain the constitutional basis that origin social law state in 1917 by establishing the foundations and the reach of state intervention considered in the original text, both in the regulation of economic activities and the promotion and provision of welfare services; in the second section are shown, in a first part, the arguments that support our own periodization of the history of social development in Mexico, and then an account of the implementation by the federation of main social reforms in four major periods. The first was Carranza's first constitutional government, and culminate with the last two administrations arising from political alternation. Finally, in the conclusions a general thought of the current social protection system, emphasizing the conditions of exclusion and poverty prevailing in our country, as well as the proposals of the new government and the challenges to be faced to move towards an inclusive and supportive social policy.

1. THE ORIGIN OF THE MEXICAN SOCIAL STATE: THE 1917 CONSTITUTION

The Mexican Revolution and its subsequent constitutional formalization established the fundamentals for the formation of a qualitatively different normative order that prevailed until the beginning of the conflict in 1910. The 1917 Constitution, without denying the liberal principles promoted during the Reform in 1857, introduced new elements to promote a more socially fair economic system. At the same time the respect for individual rights were guaranteed, there was a wide range of state intervention that opened the dynamics of economic and social pro-

cesses (Ruiz y Valadés, 1983; Sayegh, 1991; González, 1983: 112-122). The intervention was considered as a state instrument to promote the defense of "public interest", "equitable distribution of wealth" or to prevent "the offense of the society's rights". With these principles no one question, the existence and development of capitalist forms of production; however, contrary to the ideology of laissez-faire, it was attributed to the regulatory function of the state to reduce the social inequalities inherent to market relations.

The main ways of economic intervention considered in the original text of the Constitution provided to the authorities the ability to:

- Implement policies related to the management of the economy (arts. 4, 28, 73 and 131). *In addition to the traditional powers related to tax and national security, it was attributed to the State the power to limit the freedom of enterprise (art. 4), administer public monopolies, prevent the existence of private and punish speculative practices (art. 28), impose tariffs to foreign trade and verify the free circulation within the internal market (art. 131); legislate on mining, trade and credit institutions; and control monetary policy through the creation of a central bank (art. 73).*

- Decide on the social distribution of land and natural resources, expropriate and define the modalities of private property (art. 27). *From these capabilities, the State, as depositary of the rights of the nation would be empowered to regulate the land market, protect communal property, conduct restitution and distribution of land and water in rural areas, develop settlement policies and its management in the territory, and expropriations of companies exploiting natural resources (especially oil, mining and electricity).*

- Regulate markets (art. 123). *In terms of work, the purpose of the intervention was to establish the minimum conditions (in terms of rights and obligations) that should be governed by employment contracts of the "workers, laborers, employees, domestic and artisans". This feature gave the state a major role in mediating labor disputes and protecting workers' rights.*

This set of constitutional attributes allowed to edify public authorities as guiding principles of the national economy. On this basis the successive federal governments did legislative adjustments in order to educate

the norms to fulfill their strategies. The formation of a mixed economic system regulated by political and public companies, was a major result of the economic intervention of the state (Ayala, 1988; Carrillo and Garcia, 1983; Villarreal, 1988).

Commitments to society extended in the Constitution to promote a series of welfare services. In the original design of the text, the provision of each of these services (at the time: education, health, housing and social security) referred to a mixture of shared responsibilities among the principal agents of social change; that is to say, government institutions, employers and the working classes. Thus the implementation of welfare policies became dependent on instrumented mixed structures with different social coverage possibilities.

In relation to **education and health services** the entrepreneurs were mainly responsible of the social offer (art. 123). In the case of education, the state only guaranteed the free basic education in official establishments and the regulation of private schools (art. 3). With respect to health, it was provided to the responsible authorities (Council of General Health and Department of Health) only the faculty to establish preventive measures in cases of epidemics, invasion of exotic diseases, alcoholism and drug addiction (art. 73, Fracc. XVI). Considering its social outreach, constitutional commitments on health and education had serious initial limitations; strictly the principle of universality was not established in the coverage, so it cannot be considered at this time as social rights. As the social guaranteed to receive free basic education was subject to the ability of public schools, access to health, was limited to preventive actions that the government was able to develop and the offers of health assistance that employers could provide for the benefit of their *communities*.

The Progress in labor extended the state participation into to two other important areas of public welfare: it was considered of *social utility* the creation of an incipient **social security system** and the encouragement of cooperatives for the construction of low-**income housing** (art. 123). For these services, the public sector only agreed to promote the creation of *community savings and credit and housing cooperatives*, while the working class should absorb the costs of its implementation and operation. Entrepreneurs, meanwhile, would support subsidizing rental housing for their workers and only had the obligation to pay compensation in cases of work accidents or work related diseases (art. 123). Nor in these two cases the workers had the right to access to protection risks systems (illness, disability, death or unemployment) and to a decent house.

As might be understood, unlikely the broad authorities that were given to the State in economic intervention, social policy commitments

occupied a secondary place in the constitutional text. With the exception of preventive health functions, which result in the unique faculty of welfare solely for the federation, the chances of the overall impact of other policies were conditioned to the growth of the public system (basic education), the contributions of the working class (social security and housing) and the responsibility assigned to the employers of providing their workers and communities of influence, with education, personal health services and housing for rent. Most of the benefits of these policies, including those resulting from the labor reforms, would be directed to emerging social sectors in the processes of industrialization and urbanization. For rural areas, the most solid and real alternatives with possibilities of application tended to solve problems resulting from land tenure, land spoliation and land distribution, as well as some working conditions that mediate under contract. In this last case, the declaration of unconstitutionality of the payment or of wages through the employer stores helped solve one of the main problems of agricultural workers (art. 123, Fracc. X). Nonetheless, these initial limitations, the model that originates with the 1917 Constitution led to the construction of a committed state structure that protects society's welfare.

2. THE PERIODS OF SOCIAL DEVELOPMENT

As mentioned, social rights did not have a place in the original text of the Constitution. State commitments resulting from the articles were subject to coverage limitations (in basic education), to basic goals (preventive health), the contributions of workers (insurance and housing) and confidence in the role of entrepreneurs as providers of some of these services.

These characteristics of the constitutional model provides a glimpse of, in one hand, the financial and administrative weakness that the government was having at the beginning. Furthermore, considering the most significant advances, it can be concluded that greater weight issues of demands and social problems were in other areas of public action: regulation of labor markets, the formalization of labor rights and national wealth distribution. In addition, the perceptions at that time of welfare policies were just beginning to occupy an important place on the agendas of Western governments (Rubio, 1991: 90). Among other things, these items reduced the potential of this legislative reformist event in social development.

In the subsequent years constitutional amendments were introduced with the purpose of expanding public responsibilities to the welfare until the definitive incorporation of social rights: elementary education in

1934, social security in 1974, work in 1978, health and decent housing in 1983, High school education in 1993 and finally bachelor education in 2012. These legislative achievements allow us to establish that the integration of mostly all universal rights accepted in developed societies, is a recent development in our country.

Over the course of history, the absence of contractual commitments forced the state to deploy *national welfare policies* which gave governments the possibility of grading the extent of its intervention, define new priorities or even cancel previous progress. With this maneuver that started in 1917 institutionalizing a model state whose core mandate was, at least formally, to protect the *public interest*.

To analyze the process of setting up the social state in our country we have to look to a periodization that, with some nuances, reflects the proposals that have been developed by various authors in economic development topics. We have also tried to subdue our own periodization discussion with some others that have been published in the specific field of social development (see **Table 1**).

To ease the exposition, we divided the nearly one hundred years of history included in this study in only four major periods that, to our knowledge, correspond to major shifts in emphasis or orientation in the management of social policy. The first, which runs from 1917 to 1940, begins with the first constitutional government, from Carranza, and concludes with one of the most iconic in the modern history of the country, from Lazaro Cardenas. These 23 years as we shall see, there were some major social reforms presented (most notably the creation of the ministries of education and assistance, as well as the formal right to basic education.

Its importance lies in actions and agreements that made possible the gradual economic and political stabilization of the country after the conclusion of the revolutionary movement that began in 1910. A fact that reveals the priorities of the time is that it was until 1938 when, for the first time since 1917, social spending exceeded the military, standing as the second category, just below the economic expenses.

TABLE 1. REAL ANNUAL GROWTH AVERAGE OF THE MAIN ECONOMIC INDICATORS BY PERIODS AND SUB PERIODS OF ECONOMIC AND SOCIAL DEVELOPMENT OF MEXICO (1921-2012)

Periods of economical development	Years	GDP	GDP per capita	IPI GDP /1	Social Development periods	Years
Institutional Formation	1921-1934	0.68	0.95	2.23	Reconstruction	1921-1934
Cardenas six years	1935-1940	4.52	2.74	7.54	Cardenismo	1935-1940
Import substitution industrialization	1941-1977	6.38	3.18	9.35	Social Politics of Industrialization	1941-1972
- Easy Substitution	1941-1955	6.02 6.63 7.00	3.07 3.25 3.65	11.03 8.20 3.82	- Industrialization - Urbanization	1941-1952 1953-1972
- Difficult Substitution	1956-1977					
-Stabilizing Development	1958-1970					
- Share Development	1971-1977	5.78	2.30	16.72	Social politics of rural development	1973-1982
Oil boom	1978-1981	9.17	5.83	22.98		
Opening and Economic Liberalization	1982-2014	2.29	0.61	27.46	Social politics of economic liberalization	1983-2014
- Recession	1982-1986	0.47	2.87	69.52 44.10 21.49 5.81	- The adjust - Social Liberalism - Consolidation - Continuity on alternation	1983-1988 1989-1994 1995-2000 2001-2012
-Moderate growing	1987-1994	3.32	1.06			
- 95 Crisis and Recovery	1995-2000	3.52	2.14			
- Stagnation	2001-2012	2.19	0.93			

1/ Implied Price index in GDP. Sources: Own Elaboration based in: Solís, 1990; Ayala, 1988; Wilkie, 1978; Tello, 2007; INEGI, 1994; Salinas, 1994; Calderón, 2009; Peña, 2013; SHCP, 2012, 2013, 2014; Centro de Estudios de las Finanzas Públicas, 2003; Banco de México, 2014.

It was in the second period, ranging from 1941 to 1972, when the traits and the central institutions of our current welfare system were defined. It is precisely in the early years of the Forties when a reorientation of policies and resources begun, driven by the requirements of industrial growth, which would remain until the beginning of the seventies.

From the point of view of social policy, the adoption of bias in favor of industrialization is mainly materialized through the creation of the IMSS

(for its acronym Spanish) in 1943, which had among its initial beneficiaries only workers from private or parastatals who worked under contract. This first step was followed, in subsequent years, with the establishment of ISSSTE to protect federal employees and the expansion of IMSS coverage to other categories of workers in the urban area, especially banking and insurance institutions.

While it is seemingly arbitrary to conclude and start a period almost at the half of an administration, considering the characteristics of Mexican presidentialism, in this case it is justified to the extent that it is in 1972 when it ends with the creation of housing funds linked to social security (INFONAVIT and FOVISSSTE, for its acronym Spanish), the design of the institutional framework linked to industrialization that initiate in 1973 an attempt to expand the coverage of social policy in the Mexican countryside. As part of this orientation, reforms were promoted in the social security area three programs were initiated to combat rural poverty (PIDER, COPLAMAR and SAM, for its acronym Spanish).

This third period ends tragically in 1982 with an economic crisis that lasted for several years, and with it also concluded a long construction phase of the Mexican welfare regime. Even though the social policy that was imposed in the forties had been conditioned to the industrialization policy, both the postulates and constitutional amendments as well in the political discourses and in the evolution of social policy itself could be foreseen some kind of universalistic aspiration (Duhau, 1995; Gordon, 1999; Ordóñez, 2002). In the underlying logic, it was assumed that the generalization of social protection would be through the fulfillment of intermediate goals for inclusion, in the manner of a locomotive to which you were adding wagons or institutional compartments: the first would accommodate workers' formal industry, banking and services, in the second public employees and finally the self-employed and farmers.

Following the 1982 crisis and its immediate budgetary impact (with a fall in real terms of 30% of social spending in 1983),¹ the logic of gradualism breaks and initiates a change in the route of the social pol-

¹ From this moment to all allusions to the growth of federal expenses and GDP, must be considered in real terms.

icy design that, in principle, meant dismantling or liquidation of most of rural programs and the gradual elimination of subsidies to agricultural production and food. In this last period, which extends to our days and includes two governments emerged from political alternation, it can be said in a very synthetic form that the welfare regime went from being an unfinished universalist project to another in which social policy assumes a deliberately limited, residual and compensatory position (Barba, 2004).

3. SINCE THE 1917 CONSTITUTION TO CARDENISMO

The few social policy measures adopted during this period were instrumented to gradually expand as the economy recovered from the ravages of war and international depression, the political system stabilized and the organization of the federal government was reconstituted. In addition to the financial weakness of the state (with a budget of 4.6% in relation to GDP in 1921) and the inability of the economy to grow (on average 0.7% annually between 1921 and 1934) and provide new resources, the federation faced two major problems: public debt and political and military instability.

The recognition of debts incurred during the revolutionary fight (between 1910 and 1919) and the need of the victorious forces to maintain a relatively high military expenditure to meet the constant armed insurgencies (7 in total, the last one in 1938), hindered the introduction of new functions in the public area. In terms of employment the military represented 84% of federal workers in 1920 (White 1995: 115). Still in 1925 the cost of both components (debt and military spending) in the budget was higher than 57% of the total.

Under these conditions the first post-revolutionary governments granted little importance to social policy, adjusting their actions to the responsibilities imposed by the Constitution. Between 1917 and 1933 they created only central units that was responsible for applying the preventive health measures (the

General Health Council -CSG- and the Department of Public Health -DSP-, both in 1917) and provided free basic education throughout the national territory (the Secretariat of Public Education -SEP- in 1921). An important fact of this period, which approximates the environment of international concern, was the beginning of discussions about social security that led to the amendment of the Article 123 of the Constitution in 1929, which was decreed as "public utility expedition of the Social Security Act" (LSS). However, the issuance of that law, which would be the prelude to the creation of a public institution, was postponed fourteen years (Until 1943) due to the lack of agreement between workers, employers and government in the distribution of costs referred to diverse projects (Brachet, 1996: 98-102). The only achievement in these years was the civil and military pension systems in 1925.

By the early thirties, although all indicators of social policy had already grown in importance, its dimensions remained limited. Its objectives were reduced to the extension of basic education; promote the creation of nonspecialized medical units and implementation of preventive measures; and guarantee a pension to civil and military federal employees. In its quantitative aspects, the expansion of these services required a steady growth of social spending, which remained (except in 1932 and 1934) even during the most difficult years of the international depression of 1929. Despite these advances, the budget dedicated to welfare never exceeded 1% of GDP and the military personnel in 1934 still accounted for nearly half (48.9%) of federal employees (White, 1995: 115).

In 1934 Lazaro Cardenas assumed the power and during his tenure, he promoted, with a relatively stable economic and political situation, two important changes in social policy: first he formalized in the Article 3 of the Constitution the social right to elementary education, adding to the principle of gratuity the enforceability; in second place he founded the Secretariat of Public Assistance (SAP, 1937) in order to seek medical care and food to children and marginalized sectors of society (Gonzalez, 1985: 281). According to various studies, it was a fact that in this government the Social Security Law LSS could not be approved due to the economic problems that came with the nationalization of the oil industry in 1938 (COPLAMAR, 1983: 118; Brachet, 1996: 108). The only segments of the population that were eligible for social security protection in this administration were the railroad, oil and electricians, i.e., Workers who had been incorporated into the parastatal sector through policies of *nationalization* or *mexicanization* of their companies.

Overall, the social policy of the *cardenismo* exhibits a rising trend in all its variables. His most important advances lie in the recognition of basic education as a social right and the acceptance of public assistance as a commitment of the government. Both purposes were translated

into very specific policy measures that are expressed in the creation of institutions and agencies, in public works and the increase of budgets and workers. In 1938 for the first time social expenditure exceeded the military, locating as the second priority in the budgets, just below the economic expenses. Nevertheless, analyzing broader indicators and social problems solved by social politics during this government, it is observed that there was still a limited capacity for intervention.

Although social expenditures were nearly 95% higher in 1940 compared to those exercised in 1934, its volume still represented a low percentage (1.4%) as a proportion of GDP. On the other hand, however, there were welfare achievements attributable to the activities of the State, such as increased life expectancy of women and men, decline of mortality and reduction of illiteracy, for the values that these indicators continued to have at the end of the presidential term it can be established that the dimensions of national problems far outweighed the offer of public services. In basic education, the only social right that was recognized, enrollment was barely sufficient to cover 45% of the population between 6 and 14 years old and only 11% of people over 15 had completed this level in 1940 (COPLAMAR, 1985: 24 and 50).

4. THE SOCIAL POLICY OF INDUSTRIALIZATION: 1940-1972

From many points of view, as from the decade of the forties, it began a strong reorientation of policies and resources towards the requirements of industrial growth, which would remain until the beginning of the seventies. This bias, in addition to defining the social policy model adopted, contributed to accentuate the inequalities generated by the economic project. Over six federal administrations (Luis Echeverría, 1970-1976 included) measures were developed to promote industrial growth and investment of national, private and state origin, amid a mixed economy with an increased protection (Garza 1985; Cordera, 1981; Perzabal, 1988; Los Angeles, 1978; Martínez del Campo, 1985; Villarreal, 1988).

To boost the industry, the governments invested heavily in oil, electricity and communications (telegraphs, telephones, railways and highways) and used tariffs and exchange rate in order to discourage competition from foreign products; additionally developed a complex network of parastatals, which helped industrial growth with new funding, with the granting of public subsidies to energy consumption, services (including welfare) and inputs or, as later happened with the rescue of some private break downs. Finally, investments in public works and infrastructure (roads and communications, river basins, urban services), the

federation helped to improve the flow of goods, information and labor and expand the equipment of large industrial centers, at that time in Mexico City, Guadalajara, Monterrey and Puebla.

From the perspective of social policy, the adoption of bias in favor of industrialization took shape in 1943 through the adoption of the Social Security Act (LSS), meaning, the founding statute of the Mexican Social Security Institute (IMSS), whose purpose was to offer contract-contributory insurance against the life risks and old age which represents a broad sector of the population, particularly the workers of the fledgling national manufacturing. In parallel, in the same year the agencies that were responsible for preventive health (DSP) and social assistance (SAP) merged into a single ministry, under the name of the Secretariat of Health and Assistance (SSA), from that moment these institutions would play a complementary role in providing services to two distinct populations: the SSA dedicated to health care for the indigent and needy, and the IMSS obliged to protect workers who had any formal work relationship in the aspects of health and social welfare.

At least formally, with these two systems the Mexican government approached social reforms in advanced countries during the interwar period. However, unlike what happened in Europe once the war ended, social policy was stranded for more than a decade

on the frontiers that were imposed in its origin. The biggest limitations laid in the restrictions that the social security legislation contained. Given its strictness contractual-contributory, compulsory insurance to IMSS decreased to the subset of workers who worked under contract in parastatals, private or social management companies; for the rest of society, who were the majority, only had the possibility of voluntary insurance. It is remarkable that within those excluded from the compulsory were public employees of the federation, whom barely had any benefits that were given them by the General Management of Civil Pensions (DGPC) established in 1925. In sum, at this early stage the IMSS were conceived, following in the steps of the economic policy, to protect industry workers. As a result, increased state contributions to the IMSS, which came from general taxation, became a subsidy to industrialization.

This orientation was partially modified during the fifties with the adoption of new policies and creation of institutions that increase the responsibilities of the state into a more inclusive process: urbanization. This change in the emphasis, which was already dominant in the education and welfare areas, extended to social security and other welfare dimensions of welfare, like housing and food remained within very small institutional spaces. IMSS opened in 1955 the compulsory insurance of employees "of all credit institu-

tions and auxiliary insurance organizations, and surety companies in the Mexican Republic" (Carrillo, 1991: 1623). In 1959 the old DGPC finally becomes the Institute of Security and Social Services Service Workers (ISSSTE). Public assistance, meanwhile, recovered some lag and greater participation in the budget that made possible to increase hospital capacity in several parts of the country and created two new specialized agencies for infant care: The National Institute for the Protection of children (INPI in 1961) and the Mexican Institute of child Care (IMAN, in 1968), which would be replaced in 1977 by the National System for Integral Family Development (DIF, for its acronym Spanish).

In 1959 the launch of the National Plan for Expansion and Improvement of Basic education (better known as Eleven Year Plan) was outstanding for education, the main purpose of it was to "ensure that all children in Mexico got free and mandatory basic education" (Latapí 1975: 1325). In consonance with this purpose, in the same year the National Commission of Free Textbooks for elementary was founded and in 1970 distributed 53 million of books and workbooks (180 Zorrilla, 1988).

In 1961 the National Company of Popular Subsistence (CONASUPO, for its acronym Spanish) was founded with the capacity to regulate the production and distribution of basic food throughout the country.

In real estate three programs were instituted: The Popular Hous-

ing Fund in 1954 with the purpose of offering low-cost housing in major cities; the National Housing Institute, also in 1954, in order to meet the demand in rural and urban areas of disadvantaged groups; and the Financial Housing Program in 1963, with the mission to provide mortgage loans to middle-income social sectors.

These advances were expanded in 1972 with the establishment of the association of housing agencies with social security institutes: The National Housing Fund for Workers (INFONAVIT, belonging to the IMSS) and the Housing Fund for Workers in the State Service (FOVISSSTE).

By the early seventies social policy already had a complex organization acting in virtually all recognized addresses in the developed world. At the end of this period, social spending came to settle at about 34% of the programmable budget of the federation and 6.2% in terms of GDP. However, given its particular way of integrating economic policy and also because of his own disabilities, large sections of the population were outside of any possibility to access most of the services.

The main losers were those communities linked to traditional activities in rural areas; at the other end, the central beneficiaries were located in the strata of population residing in cities and that they had financing capacity and higher levels of organization and political representation (Reyna, 1977; Mesa Lago, 1978).

Some data reveal the degree of vulnerability and inequality that prevailed. If we analyze two of the most developed policies we found that the beneficiaries of social security in 1972 they represent only quarter of the national population, of which only 12.5% came from the countryside; in 1970 25.8% of the population over 15 were illiterate, but in rural areas this proportion increased to 40%; of literates only 29.5% had completed elementary, the states of greater rural and indigenous proportion (Oaxaca, Chiapas and Guerrero) had the highest values of its population without this minimum (COPLAMAR, 1985: 54).

5. THE SOCIAL POLICY OF RURAL DEVELOPMENT: 1973-1982

Considering the context of inequality and using an increased budgetary deficit, the federal government began in the early seventies a leading strategy to correct the course and broaden the channels of social policy, in part to serve disadvantaged populations, that mainly lived in the countryside.

With this objective in 1973 the introduction of specific actions in favor of the poorest in the country was done, being one of the main actions the Social Solidarity Program IMSS to provide health care services to the general population; Integral Program for Rural Development (PIDER) with productive and social projects; and, after 1976, the General Coordination of the National Plan for Depressed and Marginalized Groups (COPLAMAR) with community development initiatives. Additionally, in 1980 the Mexican Food System (SAM) was created, with influence on the production and distribution of food. All without detriment of progress, substantial in most cases, which continued to register the existing policies and institutions.

This reorientation was extended to all social intervention areas, but were particularly important the reconsiderations of the legal status of the IMSS, besides allowing access to the countryside marginalized people to medical services, they led to the recognition of the universal right to protection. In 1973 a comprehensive reform of the LSS proposed to extend "the benefits of the statutory scheme, of the 1943 law that basically included the formal employees, to other groups not protected [...] With the purpose to gradually incorporate all Mexicans that were *economically active*" (Carrillo, 1991: 1621).

This new law included as insurable population in the mandatory model: "people who are linked to one another by a working relationship, whatever is the origin act and whatever the legal status or the economic nature of employer; members of a cooperative production societies

and workers administrations or mixed; ejido members, co-proprietors, settlers and smallholders organized in solidarity group, local society or credit union, including the Farm Credit Act; workers in cottage industries and independent, as professionals, small traders, craftsmen and other self-employed and independent employers with insured individuals at their service" (Carrillo, 1991: 1622-1623).

In accordance with these changes, the following year an amendment of the Article 123 of the Constitution was approved to specify: "XXIX. - The Social Security law is of public interest, including disability insurance, life, involuntary cessation work, illnesses and accidents, child-care and any other benefit for the protection and welfare of workers, peasants, unsalaried and other social sectors and their families. "With all this, finally Mexican legislation tacitly accepts the right of everyone to receive the benefits of public provision, regardless of their economic status or employment status. And four years later, in the same article it is stated that "everyone has the right to a decent and socially useful work". Both amendments can be understood as a new formal approach to advanced welfare systems, assuming universal access to social security and full employment as state policies.

Notwithstanding the foregoing, in practice these objectives were fulfilled in a limited way for two reasons: first, the tax-contractual principle remained intact as a discriminatory criterion of social security and, secondly, scarce public employment programs did not prevent a significant part of the population remained outside the formal labor market or kept unemployed. In addition to this, most of the actions were and have been insufficient to implement the compulsory insurance for many categories of workers, including those who had already been identified as potentially insurable, the case of domestic. These difficulties have become impassable barriers for rural people, who despite of being privileged subjects of reforms had suffered a gradual decline as IMSS right holders, to the extent that currently only 3.4% of its insured are working in agricultural activities. Even with these restrictions, the seventies represented the most important expansion period in its history, which went from close to a quarter of the national population covered in 1970 to almost a half (46.5%) in 1982.

In general, these were years of accelerated growth in the federal public sector as a whole, which led to have an unprecedented position in the social and economic environment. Particularly institutions and social programs were able to double and in some cases, even triple coverage for services. However, for a large part of Mexicans in poverty the access to the redistributive state channels remained as an unfulfilled promise. Moreover, even in these years due to the inability of the state to control the economic deterioration that led to the crisis of

1976, the business groups' positions in favor of liberalization and restrictive measures of public intervention started to gain strength (Cordera and Tello, 1997: 64-68).

The oil boom illusion that was announced in 1978 came to an end in 1982 with a new crisis which, together with the bank nationalization decreed that year, intensified the conflict with entrepreneurs, and provided justification for international intervention and opened the doors to reversion.

6. THE SOCIAL POLICY OF ECONOMIC LIBERALIZATION: 1983-PRESENT

Due to upsurge in economic problems (drop in production, hyperinflation, flight of capital, cancellation of international credits, among others), the Mexican government was forced in 1982 to negotiate with the IMF a stabilization program that, among other things, included a commitment to reduce the fiscal deficit (in 1982 hovered around 14% of GDP).

Complying with this objective in 1983 a severe adjustment to public finances, which affected, especially social expenditure, fell 14% above the general decline of programmable spending, that is to say 30% was applied. In general, none of the social policies were saved from the cuts, but the programs to combat rural poverty were who suffered the worst consequences almost to the point extinction. Of these programs only the health care program IMSS and CONASUPO for food distribution survived. Paradoxically, with all this loss of resources two reforms to Article 4 of the Constitution were approved in 1983: "everyone has the right to health protection" and "every family has the right to enjoy decent and decorous housing".

With these latest amendments, the State formally assumed the set of social rights that are recognized in most advanced welfare systems advanced, but because of the economic downturn of those years it can be assumed that living conditions worsened in widely. In the perspective of the observed changes in the countries that took action to dismantle its welfare states in this same decade, Mexico's experience was much more devastating with an unfinished social policy. There are not few reasons to suppose this question: the drop in social spending was spectacular, the programs that were oriented for the poorest population were particularly attacked and the adoption of measures to liberalize (elimination of subsidies, privatization) many of the public goods and services of general consumption (telephones, roads, food, etc.).

Between 1981 and 1988 social expenditure dropped from 9 to 5.7% relative to GDP, this drop was surprising in a context of industrialized nations.

The damage caused during these years led to demonstrations of popular discontent converged into the 1988 presidential election by a vote of nearly 50% against the ruling party, the PRI (for its acronym Spanish).

Under these conditions it was no coincidence that the Chief Executive emerged from these elections has proposed a national agreement to expand democracy, stability and recover growth and improving the level of popular welfare (Salinas, 1988). These commitments were based on a basic principle that, at least formally, modified one of the criteria of the economic policy of the previous government. Against the premise that it was necessary to grow first and then distribute, the idea of growing and distributing as parallel options were put in front. The promise to expand the spaces of democracy completed the offer of a weak government that pretended, on one hand deepen economic agenda and, and in the other, to recover legitimacy.

During these six years the economy recorded a moderate, but sustained growth and social policies actually received substantial funding that allowed them to achieve a historical high in 1994 (9.2% of GDP), occupying a little more than half of the projected expenditure. In addition to the expansion of traditional policies, an ambitious program to combat rural and urban poverty, the National Solidarity Program (PRONASOL, for its acronym Spanish) were introduced. Another constitutional amendment took place in 1993 which extended the social right to secondary education. Undoubtedly, during this government the situation improved in many ways over the previous six years; however, the improvement was insufficient to restore life conditions prior to the 1982 crisis. It is remarkable that even with the reported flow of resources, social services did not achieve, with some exceptions (mainly basic education and vaccination), substantial expansion in its coverage, especially among low - income populations. A new crisis in 1995 started again a period of contraction whose first victim was PRONASOL.

The adjustment to public finances that took place during the first year of the government of Ernesto Zedillo (1995) resulted in a decrease in social spending about 15%. While there was a recovery of funding for social development in the following years, to the extent that in 2000 exceeded by almost 25% than in 1994, most of that growth was directed to repay funds that IMSS lost with the implementation of the liberal reforms to the pension system in 1997, which forced the state, to increase its share of about 5% in 1995 to more than 42% of the revenue

that was expected that the IMSS would capture directly in 1998, with the total the expectation was to cover the total amount of the current pensions and part of the sickness and maternity, disability and life insurances, child care, among other social benefits (SHCP, 1998:3 y 6). At the end of the presidential term federal contributions to social security, increased by almost 130% over allocated in 1994. Derived from this, the rest of social expenditures recorded a moderate annual average growth (between 2 and 2.3%) or even negative (-2.9% in the case of assistance programs).

Initiatives of this government to the other welfare areas were limited to consolidate processes that had begun during the previous two administrations, such as decentralization of basic education and healthcare, elimination of food subsidies and the acquisition of popular housing and the implementation of targeted compensatory programs. In this last aspect, it highlighted the late intervention in the implementation of two programs, published in the mid-administration, partially covering the gap left by the PRONASOL. Thus, in addition to present a limited offer, established extremely restrictive eligibility: Program to Overcome Poverty, were rescued some productive actions and infrastructure; and the Education, Health and Nutrition (Progresa), designed to assist rural population living in indigence.

In this context, the first government from opposition emerged after more than 70 years with a dominant party and generated great expectations to the obvious social dissatisfaction with a situation of deteriorating prevailing. However, the amendments made by this government in the management of social policy were marginal: the launch of a popular insurance as a way to access health care services, the extension of the coverage of Progresa (now Oportunidades) in urban areas and the implementation of a series of highly targeted programs (Habitat Microrregiones, Development of Indigenous Communities, among others).

In contrast, during this six-year period there were major changes promoted in national legislation relating to social development, highlighting the constitutional reform of 2001 by which all forms of discrimination are prohibited (Art. 1) and the enactment in 2003 of the Federal Law to Prevent and eliminate discrimination, which also regulate the right to non-discrimination introduced the obligation of the State to establish compensatory measures for the care of vulnerable groups in order to promote equal opportunities (Ordóñez, 2012: 18-21). In this line also excels the publication in 2004 of the General Law of Social Development, one of its main aims to "guarantee the full exercise of the social rights consecrated in the Constitution..., Ensuring access of all the population to social development"; Article 6 of this law reaffirmed social rights as education, health, food, housing, work, social security and those con-

cerning non-discrimination. Both laws gave origin to the creation of two public entities, CONAPRED and CONEVAL, that undoubtedly made significant efforts to guide social policy towards greater inclusion, but as we shall see in the next section backlogs still remain considerable magnitudes.

The second alternation government chose to keep the program structure of its predecessor, but also launched several programs to overcome poverty which also proved to be highly vocalized and in some cases even discriminatory. The main changes introduced by this government to the inherited social policies were: increasing *Oportunidades* program coverage (from 5 to about 6 million households); the implementation of the program "70+" which included a monthly cash transfer for those over 70 years from towns with less than 30,000 inhabitants; the increase of the health coverage through Seguro Popular, which in 2012 reached 47.8 million members (Coneval, 2014: 5) and the implementation of new schemes such as Healthy Pregnancy and Medical Insurance for a New Generation, whose aim was to only assist babies born as of 1 December 2006. In addition, related to housing, a number of initiatives seeking to change the construction conditions of households in poverty or to improve the urban environment were implemented. Finally, through a constitutional reform, in 2012 the right to high school level education was added.

Regarding economic performance, it should be said that the last two governments were immersed in an unfavorable international environment that prevented an economic growth at the required rate. Between 2001 and 2012 GDP barely grew in real terms at an average annual rate of 2.2%. In addition to the mortgage crisis and the slowdown in the US economy that began in 2007, in 2008 adverse conditions appeared (high oil prices and food shortages), which negatively affected growth projections to the extent of causing the outbreak of an international crisis in 2009 whose effects have not yet been overcome. In these years, combined with unemployment, there were an increase of commodity prices that hit the economy of families, mostly lower income, forcing the federation to implement support for food production, alleviate the effects of the food inflation among the poorest and stimulate employment.

TO CONCLUDE: REFLECTIONS ON THE CURRENT SOCIAL PROTECTION SYSTEM

The social protection system formed in the last hundred years in Mexico is at a crossroad. From a formal point of view, the Constitution recognizes social rights which are commonly accepted in advanced societies

as components of the minimum necessary to have a decent life and opportunities for integration and social advancement.

In deeds, except for basic education and preventive health, access to welfare services is not guaranteed to several social sectors that remain absolutely or partially marginalized, of the redistributive state circuits. This has been, mainly, because of the particular integration model of social policy to the needs of economic growth, specifically those activities were and continue to be a priority in the national development project. This particularity was instrumental in the evolution of social security, but has influenced the becoming of the entire welfare system.

If we consider the set of benefits that the state can provide, according to estimates CONEVAL found that in 2014 only about 27% of the population was able to enjoy formally universal goods and services : education, social security, health, housing and food; in other words, nearly three-quarters of the population has at least a deficiency associated with those rights; in descending order, the largest backlog is the access to social security, to which 58.5% of the population is excluded; though in smaller proportion, there is still almost a quarter without access to adequate food, about one-fifth is in a situation of educational backwardness, without access to health services and water, drainage and electricity, and more than 12% living in poor qual-

ity housing. In addition to these shortcomings, income indicators show that 20.6% of the population does not have enough resources to purchase the indispensable for adequate nutrition (line of minimum welfare) and more than half neither can satisfy their non-food needs (welfare line) (CONEVAL, 2015).

In other things, the income poverty historical measurements indicates that this is a long standing condition that even today affects more than half of Mexicans (52%), representing a similar proportion that prevailed 30 years ago (53 percent in 1984, see **table 2**). In addition to showing the persistence of poverty in our country, the historical series also reveals the vulnerability of low-income population to deal with the negative effects of economic instability and expose the ineffectiveness of public policies and programs to create conditions that allow people to permanently leave poverty condition. As a result of the two crisis in the period of 1992-2012 there was a high peak in the amount of poor people: between 1994 and 1996 the number rose by nearly 17 million, and between 2006 and 2012 just over 14.8 million, which reached a figure of over 61.3 million people in 2012.

TABLE 2. PERCENTAGES AND VOLUMES OF THE NATIONAL POPULATION IN INCOME POVERTY, 1950-2012

Year	Percentages	Number of people
1950	88.4	23,902,145
1956	83.5	26,840,834
1958	81.3	27,873,633
1963	75.2	30,449,341
1968	69.4	33,095,980
1977	63.8	39,962,886
1984	53.0	39,755,673
1989	53.5	44,765,279
1992	53.1	46,138,837
1994	52.4	47,018,805
1996	69.0	63,967,416
1998	63.7	60,671,333
2000	53.6	52,700,549
2002	50.0	50,406,024
2004	47.2	48,625,044
2005	47.0	48,895,535
2006	42.7	46,549,346
2008	47.7	53,381,457
2010	51.3	58,519,936
2012	52.3	61,350,435

Sources: de 1950 to 1989: Székely, 2005; and from 1992 to 2012: CONEVAL, 2013.

From different angles, social and territorial distribution of poverty shows a pattern that tends to reinforce the conditions, prevailing inequality between regions and social groups. At a territorial level they are still deep gaps between the most urbanized and industrialized states in the country and those with a predominantly rural population and dedicated to primary activities. In this last subset the states of Oaxaca, Guerrero and Chiapas highlighted to be the poorest and with the highest proportion of rural and indigenous inhabitants. In the case of indigenous poverty is not limited to these places, the phenomenon afflicts all communities spread across the country and in this case poverty reach a proportion close to 80% (Coneval, 2012: 45).

As it is shown, the welfare system that developed in over nearly a century has generated a divided society in terms of meeting their basic needs.

By its structural nexuses with priority productive activities, this system has helped to accentuate inequalities generated in the economic sphere, making it a clearly regressive redistribution regarding the standard that is supposed to drive their function. This has set up a social policy that favors individuals better located in the economic structure, with higher income and organizational capacity and influence in government decisions.

In this scenario, the current government since the start of its period in December 2012, proposed a series of structural reforms that were supposed to generate a new stage in the development of the country. In this context, it was achieved in December 2013 the approval of a package of reforms in fiscal and social policy, according to its promoters, must "create a more prosperous and equitable Mexico". Regarding income, the tax reform, which came into force in January 2014 proposed to extend the tax revenue, mainly through increases in income tax, both individuals and corporations, and the approval of IVA on the northern border, which increased from 11 to 16%. In respect of social reforms, there are two main proposals: universal pension: for adults over 65 years in the amount of 1,092.00 pesos per month and unemployment insurance to workers who have contributed at least 24 months, which should cover a maximum of six months after the last day of employment.

According to the General Criteria for Economic Policy 2014 (SHCP, 2013), is expected that with the maturity of the tax reform and other already approved (energy and telecommunications, mainly), there will be an upturn in the economy and strengthening public finances.

In this document we expect that by 2017 the economy will reach high growth rates and return to a balanced budget. If these scenarios materialize it might be that possible, major changes allow access to greater resources to finance economic and social development of the country. It is still early to evaluate if the prediction will be achieved, but the negative global economic environment and the fall in international oil prices observed in 2015 suggest that the recovery of the national economy will be even slower and with it the tax reform proposal won't be enough to achieve the strengthening of public finances.

There is no doubt that the future of the nation depends on the ability of the economy to overcome its structural weaknesses and grow at high rates over long periods; however, even in the best economic scenario, there is still a little opportunity of giving viability of social inclusive development project if within the process the inequalities in the distribution are not corrected, and the growth becomes in more decent better paid jobs.

If the economic policy is kept detached from these basic objec-

tives, any other government initiative that attempts to influence the causes of marginalization and poverty will be inadequate and will eventually have disappointing results. In addition, without a proper guard of the basis of economic security (employment and income) the State will face serious difficulties in deploying a fiscal policy that will strengthen its intervention in development, especially to finance the provision of the required levels of the welfare services.

Furthermore, it is required to ensure the protection of the welfare and it is required to impose several transformations, adapted to the particularities being experienced by each component of social policy, but with the common purpose of adjusting, as proposed by CEPAL (2000: 32-33), the design, financing, provision and regulation policies to the principles of universality, solidarity (progressive distribution of costs and access to services regardless of the tax possibilities) and efficiency (ability to maximize social goals with limited resources. As affirmed by this organization, a reform of this nature does not contradict the application of selectivity criteria in the distribution of public resources among the poor, but they must be understood not as a social policy itself, but as "a condition for most effective universal" (ECLAC, 2000: 33); it does not preclude the participation of private agents or the introduction of competition and market mechanisms, but in any

case they must be subject to regulation to ensure efficiency and promotes equity (ECLAC, 2000: 89). As affirmed by this organization, a reform of this nature does not contradict the application of selectivity criteria in the distribution of public resources among the poor, but they must be understood not as a social policy itself, but as "a condition for effective universalization" (CEPAL, 2000: 33); neither exclude the participation of private agents or the introduction of the market and competition mechanisms, but in any case they must be subject to a regulation that ensures efficiency and promotes equity (CEPAL, 2000: 89).

If we take into consideration the limitations of our current social protection system, obviously the universalization of the minimum level of welfare recognized by the constitution, that because of its matter and complexity requires to be considered in a long-term horizon and in accordance with the progress in employment and fiscal policy.

In our opinion, the greatest challenge of social policy resides in the formulation of a strategy that is able to push institutional changes established on a sustainable and equitable financial base, and in perspective to offer inclusion opportunities to reduce regional inequality, economic, ethnic, intergenerational and gender prevalent in Mexican society, and assist the most vulnerable groups (women, children, disabled, in-

digenous and elderly, among others). Given the dimensions of this project, we expect that the transformation of institutions and the ownership society in the transition to a state of advanced welfare will be gradual and in accordance with a proper selection of priorities. However, gradualism as an unavoidable feature of the process should not result in the loss of orientation around the ultimate goal (universality) and doesn't exempt the responsibility for implementing measures that drive to change and improve profitability, efficiency, productivity and distribution of investment, organizations and public programs.

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