

UNIVERSAL BASIC INCOME: AN INSTRUMENT OF SOCIAL POLICY TO FIGHT THE COVID-19 CRISIS. THE CASE OF MEXICO

Manuel Ignacio Martínez Espinoza*

ABSTRACT: In this essay, the Universal Basic Income (UBI) is analyzed as a feasible measure of social policy to fight the strains of the SARS-CoV-2 (COVID-19) virus pandemic efficiently in Mexico. The text develops its arguments in four sections. The first one presents the multilateral emergency situation originated by the COVID-19, which pushes for appropriate and contextualized measures. The second one is a reflection on the characteristics, benefits and obstacles of an UBI as a tool for strengthening social policy. The third one studies the possibility of implementing the UBI in Mexico, presenting its advantages, challenges and suggesting schemes for its execution. The essay closes with a final reflection in order to support the implementation an UBI in Mexico.

Keywords: Social policy, Universal Basic Income, Poverty, Money Transfers, Mexico.

*I do not want anything for me:
I just long for the possible impossible:
a world without victims*
José Emilio Pacheco

* Professor of the National Council of Science and Technology (CONACYT by its Spanish acronym) commissioned to the Center of Higher Studies of Mexico and Central America of the Universidad de Ciencias y Artes de Chiapas (Chiapas University of Sciences and Arts, CESMECA-UNICACH by its Spanish acronym).
Email: manuel.martinez.espinoza@gmail.com

1. THE NEED TO ACT DISTINCTLY AND CATEGORICALLY IN AN ALARMING CONTEXT

The sanitary contingency caused by the SARS-CoV-2 virus (COVID-19) pandemic is unleashing serious social and economic effects in the world. Experts and international organizations warn that we are entering a very difficult economic stage where the Gross Domestic Product (GDP) will shrink in 90% of the world's countries, giving the world economy its biggest fall since World War II, which will be an unprecedented concurrent process with no quick recovery (WB, 2020).

Clashes of supply and aggregate demand, fall in prices of primary products, reductions in production levels, deterioration in commerce chains, a decrease of value in the service sector (particularly in tourism), liquidity problems and the accumulation of debt are dragging along business bankrupts, loss of jobs and diminishing incomes.

For 2020, the forecast is that the world commerce volume will decrease by between 13% and 32%, world tourism will drop between 60% and 80%, and the prices of energy resources will fall 39%, while minerals, metals, agriculture and livestock will drop 6%. With all of these, the world GDP will be reduced by a 5.2% (CEPAL, 2020, pp. 1-4). This will profoundly affect emerging economies, such as the ones in Latin America.

Before the emergency of COVID-19, Latin America was living a context of low economic growth, accumulation of fiscal deficits, job scarcity, increase in poverty, high inequality and a weakening of social cohesion (CEPAL, 2020b and 2020c). For example, in “the decade following the world financial crisis (2010-2019), the regional GDP growth rate decreased from 6% to 0.2%; furthermore, the period from 2014 to 2019 had the shortest growth since the decade of 1950 (0.4%)” (CEPAL/OIT, 2020, p. 5).

In 2019, the unemployment rate increased slightly (CEPAL/OIT, 2020, p. 11), but the average unemployment rate among women was 2.5% above men. Also, there was an increase in underemployment by hourly rate that “confirms a tendency towards a loss of the quality of jobs in the labor market” (CEPAL/OIT, 2020, p. 18).

An aspect that must be emphasized is informal labor, a source of income for many households in Latin America and the Caribbean, where the average rate of job informality is of approximately 54% (CEPAL/OIT, 2020, p. 9). This is a major risk factor since many of these workers do not have access to quality health services and –given the characteristics of their jobs– they are highly exposed to contagion of the coronavirus. Also, their income are generally low, which is why their ability to save for facing long periods of inactivity is limited. (CEPAL/OIT, 2020, p. 9).

In data from 2019, the population considered to be in extreme poverty was 11% of the whole Latin American population, while 30.3% of people were in poverty (CEPAL, 2020c, p. 2). According to numbers of that same year, 77% of the region's population (470 million people) belonged to low or moderately low incomes. In data from 2017, only 31.8% of economically active people with low or moderately low incomes were affiliated or made contributions in the pension system (CEPAL, 2020c, p. 3). And only 61% of the regional population counted with at least one benefit of social protection (CEPAL/OIT, 2020, p. 30).

Given the aforementioned scenario, all of the projections indicate that the pandemic will intensify the social risks in the region. For example, there is an estimated fall of 9.1% in the average GDP in Latin America (CEPAL, 2020, p. 9), which would be “the worst in all of its history” (CEPAL, 2020b, p. 20).

This economic contraction would have serious impacts since it would increase the unemployment rate up to 13.5% by the end of 2020, which means that the number of unemployed persons would reach 44.1 million, an increase of 18 million to the numbers of 2019 (CEPAL, 2020, p. 10).

Informality would also expand, while working days and salaries would be reduced, deteriorating the quality of jobs. This would have an impact on social indicators so that, by the end of 2020, there is a projection that the number of people in poverty will increase by 45.4 million, totaling an amount of 230.9 million people, in other words, 37.3% of the population of Latin America. The population considered to live in extreme poverty would increase by 28.5 million reaching a total of 96.2 million people, which equates to 15.5% of the whole population of Latin America (CEPAL, 2020, pp. 10-11). These are frightening numbers of a reality that normalizes injustice and that would create more victims and new nightmares.

The largest increases of poverty would happen in Argentina, Brazil, Ecuador, Mexico and Peru, while Brazil, Colombia, Ecuador, El Salvador, Mexico and Nicaragua would register the largest increases in extreme poverty (CEPAL, 2020, p. 11). The most serious impacts would be on the most vulnerable sectors: women, children, the young, indigenous people, afro-descendants, immigrants as well as people living in homeless situations, the unemployed, people with informal jobs and from rural areas (CEPAL, 2020c, p. 6).

Also, a deepening in inequality is projected, since the Gini¹ index would increase by between 1% and 8%, presenting its greatest effects in Brazil, Chile, Ecuador, El Salvador, Mexico, and Peru (CEPAL, 2020, p. 11). The average Gini index in 2018 was of 0.465% (CEPAL, 2019, p. 21).

¹ The Gini coefficient is one of the most used ways to measure income inequality. Its values are established between 0 and 1, with 0 being the largest equality and 1 being the largest income inequality.

In this context, the measures that governments take become a fundamental topic, not only for public office, but for everyday life itself. Due to the pandemic, in Latin America several measures of social protection and job markets have been implemented, such as the adaptation of existing transference and food programs, the creation of new transference and food programs, giving back IVA (value-added taxes), bonuses or subsidies for dwelling and dwelling services, psychosocial support services, unemployment insurance, advancement of benefits, protection measures against unemployment, support for small and medium-sized businesses and reductions on taxes and working hours (Rubio, Escaroz, Machado, Palomo and Sato, 2020, pp. 5-9). By July 3, 2020, 190 measures had been registered in Latin America (CEPAL, 2020, p. 22).

Within this context, were the first suggestions, discussions and even implementations of a novel measure to implement in the region: an emergency basic income. Even if it is not the same, said measure caused public debates on another controversial social policy instrument: the Universal Basic Income.

2. BETWEEN STRUCTURES AND JUNCTIONS: THE UNIVERSAL BASIC INCOME AND EMERGENCY TRANSFERENCES

On April 3, 2020, *The Financial Times* considered to be the most important business newspaper in the world, and a relentless free market advocate, published an article stating that the pandemic had shown the frailty of the social contract. In a twist that contradicted its editorial policy, its printed that, in order to face the crisis, it would be necessary for governments to take on a more relevant role in the economy since the subject of redistribution would be back on the agenda. So, policies that once were considered to be eccentric, such as the basic income and wealth taxes, would now have to be part of new proposals.²

Although it is surprising, this has not been the only mention of the basic income during the sanitary contingency. In a column published on May 6, 2020 in *The Guardian*, Esther Duflo and Abhijit Banerjee, both winners of the 2019 *Nobel Prize for Economics*, proposed to set in motion a Super Basic Universal Income to stop the coronavirus crisis from turning into a catastrophe.³ Thomas Piketty, author of *Capital in the Twenty-First Century* suggested a tax on

² Translated by the author. The editorial comment “Virus lays bare the frailty of the social contract” can be consulted in: <https://www.ft.com/content/7eff769a-74dd-11ea-95fe-fcd274e920ca>.

³ Esther Duflo and Abhijit Banerjee “Coronavirus is a crisis for the developing world, but here’s why it needn’t be a catastrophe”, available in: <https://www.theguardian.com/commentisfree/2020/may/06/vulnerable-countries-poverty-deadly-coronavirus-crisis>.

properties for distributing \$132,000 dollars among people older than 25 years old.⁴

The posturing in favor of the basic universal income came from several public figures: entrepreneur Elon Musk and Facebook founder Mark Zuckerberg;⁵ former presidential candidate Bernie Sanders demanded monthly payments for American citizens during the pandemic,⁶ the democrat presidential pre-candidate Andrew Yang promised to make such an idea possible in the United States in case he won the elections,⁷ and the prime minister of Scotland, Nicola Sturgeon, informed that her government had presented four different projects in such regard before the United Kingdom.⁸ The founder of the Twitter social network, Jack Dorsey, announced that he would destine 3 billion dollars for financing an initiative called “Mayors for a Guaranteed Income”, an experimental basic income program to be carried out in 14 cities in the United States.⁹ In a letter addressed to popular movements, Pope Francis wrote that “maybe it was time to think of an universal income”.¹⁰

The proposal to implement a basic income in the world for facing the social consequences of the COVID-19 pandemic has also come from international organizations. By the end of July 2020, the United Nations Development Program (UNDP) published a report in which it called the governments of 132 developing countries to grant a temporary basic income that would benefit 2,700 million people that live below or near the poverty line (Gray and Ortiz, 2020). The Economic Commission for Latin America and the Caribbean (CEPAL by its Spanish acronym) proposed countries the transference of an emergency basic income for their populations living in poverty situations (CEPAL, 2020, p. 22).

That is how one of the measures set in motion for cooling down the social effects of the pandemic has been the creation of new monetary transferences for the most vulnerable among the population, as it has been done in Australia, Austria, South Korea, Spain, the United States, Hong Kong, India, Israel, Kenya, New Zealand, Singapore, Togo and Turkey, just to mention some examples.

4 Source: “Thomas Piketty: ‘Propongo un impuesto que permita dar a todo el mundo 120.000 euros a los 25 años’”, available in: https://elpais.com/elpais/2019/11/22/ideas/1574426613_189002.html?prod=REGCRART&o=cerrideas&event_log=oklogin.

5 Source: “Renta Básica Universal: un debate que trasciende la emergencia del coronavirus”, available in: <https://www.france24.com/es/20200410-renta-basica-universal-debate-covid19>.

6 Source: “Renta Básica Universal: un debate que trasciende la emergencia del coronavirus”, available in: <https://www.france24.com/es/20200410-renta-basica-universal-debate-covid19>.

7 Source: <https://twitter.com/BernieSanders/status/1241380960622522371?s=20>.

8 Source: “‘Time has come’ for universal basic income, says Sturgeon”, available in: <https://www.independent.co.uk/news/uk/home-news/universal-basic-income-ubi-scotland-uk-nicola-sturgeon-coronavirus-a9498076.html>.

9 Source: “Twitter billionaire Jack Dorsey just announced he’ll fund a universal-basic-income experiment that could affect up to 7 million people”, available in: <https://www.businessinsider.com/twitter-billionaire-jack-dorsey-universal-basic-income-experiment-2020-7?IR=T>.

10 Source: “Carta del Santo Padre Francisco a los movimientos populares”, available in: http://www.vatican.va/content/francesco/es/letters/2020/documents/papa-francesco_20200412_lettera-movimentipopolari.html.

In Latin America, the most extensive social protection measure has been the emergency transference: between March and April of 2020, sixteen Latin American countries¹¹ created a new monetary allocation to which they destined an average 0.7% of their GDP (doubling the amount before the pandemic).¹²

The world expansion of monetary transfereces contributed to start the debate on a social policy instrument scarcely implemented but thoroughly controversial: the Universal Basic Income.

The Universal Basic Income (UBI), also called the Universal Basic Wage¹³ is a cash transference or retribution that the State periodically hands out to each citizen or resident in their territory, individually and independently of their economic, family or job situation (Gutiérrez Lara, 2018, p. 16). It is basic and universal because it has the intent of building a minimum limit for everyone to build upon their lives, which is why it must be handed out in cash, individually, with no conditions and no need to verify income in order to receive it (Van Parijs and Vanderborght, 2017, pp. 20-41).

Although it came up as an idea in Europe by the end of the XVIII century,¹⁴ the UBI has always been a controversial proposal because it counters a world view that occidental States incorporate into their social protection systems: that the sustenance must be earned through labor and that idleness must be condemned, which is why help must only be provided to unemployed people that do not lead slacker lives.¹⁵

11 The countries that created new transfereces were: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Haiti, Jamaica, Paraguay, Peru, Trinidad and Tobago, Dominican Republic and Venezuela. Other countries installed a transference but not for vulnerable families. For example, Cuba established a payment for workers that could be relocated and for hospitalized patients, while Honduras created a solidary bonus but only for transportation workers. For more on this, check the CEPAL COVID-19 Observatory, available in: <https://www.cepal.org/es/temas/covid-19>.

12 Source: “La Cepal llama a los países latinoamericanos a crear una renta básica como paso previo al ingreso universal”, available in: <https://elpais.com/economia/2020-05-12/la-cepal-llama-a-los-paises-latinoamericanos-a-crear-una-renta-basica-como-paso-previo-al-ingreso-universal.html>.

13 The UBI has also been called “state premium”, “social dividend”, “universal subsidy”, “citizen wage” and “survival income” (Van Parijs and Vanderborght, 2017, pp. 22-23).

14 Although in his book *Utopia* (1516), Thomas More talked about the idea of providing support for everybody so that no one had the need to become a thief, Thomas Paine is commonly known as the forefather of the UBI in his book *Agrarian Justice* (1796), in which he suggested the creation of a national fund for paying 15 pounds sterling to everyone 21 years and older and 10 pounds sterling to everyone 50 years and older. Since then, several thinkers from different ideologies have backed the idea; people like John Stuart Mill, Bertrand Russell, Karl Popper, Milton Friedman, Friedrich Hayek, o Gösta Esping Andersen. To go deeper on the history of the UBI, please go to: (Bejarano, et al., 2019), (Standing, 2018) and (Van Parijs and Vanderborght, 2017).

15 Such understanding was the foundation of social assistance, originally laid out in the book *De Subventionem Pauperum* by Juan Luis Vives, published in 1526, which generalized the idea that public authorities had to be a direct part in social assistance for people living in poverty (Van Parijs and Vanderborght, 2017, pp. 75-78). From that point on, both public authorities and intellectuals normalized the idea of earning sustenance only through work and condemning idleness. For example, Kings Carlos I of Spain and V of the Sacred Roman Germanic Empire, in 1531 promulgated an edict that regulated help for people in poverty sanctioning begging (Van Parijs and Vanderborght, 2017, p. 80). Philosophers such as Montesquieu, John Locke, Edmund Burke and Herbert Spencer thoroughly replicated this idea. Between the XVI and XX centuries, this line of thinking spread out in Mexico’s governmental decisions, legislations and public opinion (González Navarro, 1985).

In the UBI proposal, income is considered to be essential for human survival but it is understood as something disassociated from work¹⁶: it is considered to be a procedural right to implement essential human rights (the right to life, freedom, property) that must be safeguarded by the State.

Quite possibly, the differences in conceptualizing income and employment have obstructed the implementation of UBI, but its opponents have also presented other criticisms. The three main objections are that the UBI is quite expensive to implement; that it discourages the need for work (promoting laziness); and that it is a useless instrument against poverty.

Specialized research has pointed both challenges and potential for UBI but have concluded that “theoretically, at the very least, they can be a mechanism to fight inequality and poverty” (Marín, 2018, p. 25), and for transiting towards new redistribution schemes (Gutiérrez Lara, 2018), protecting and widening human rights (Lo Vuolo, Raventós and Yanes, 2020), for immediately handing out resources with no bureaucratic schemes (Standing, 2018) to reduce costs for providing social benefits (Murray, 2006), and to expand people’s liberties, autonomy and independence (Yanes, 2016). Summarizing, it is feasible to argue that “in scientific terms, there have been no evidences found of most of the negative effects that are attributed to UBI *a priori*, particularly when talking about the job market” (Tena, 2018, p. 867).

Close programs to an UBI have been implemented in Alaska since 1982 and in Macao (a semi-independent province of China) since 2015; while another program was carried out in Iran from 2010 to 2016. Also, there have been other pilot programs carried out in Germany (Berlin), Brazil (Maricá), Canada (Dauphin Manitoba, Ontario), Finland, Scotland, Spain (Barcelona), the United States (California, North Carolina, Indiana, Iowa, New York, Pennsylvania, San Francisco, Seattle), Holland (Utrecht), India (Madhya Pradesh), Italy, Kenya, Namibia and Uganda.¹⁷

As aforementioned, in order to fight the COVID-19 sanitary contingency, several programs have been implemented stimulating the UBI debate. The Emergency Family Income in Argentina and Chile; the Emergency Bonus in Brazil; the Solidary Income in Colombia; and the Minimum Vital Wage in Spain are just some of the new transferences that –although not quite the same

16 People in favor of UBI argued four reasons for conceiving income as a right disassociated from work: 1) It is impossible to assure full employment on any society, so that even if all people wanted to work, they wouldn't be able to do so. 2) There are relevant jobs that are essential for society which cannot be monetized nor remunerated (particularly those of social volunteers and in care systems which are primarily carried out by women). 3) The increase of automation will bring many economic benefits, but also unemployment and scarcity which will deepen inequality. 4) Free time has an emancipating function since it allows people to use their time in what they like, which favors free choice and happiness.

17 The analyses and evaluations of these programs and experiments can be consulted in (Marín, 2018), (Standing, 2018), (Tena, 2018), (Van Parijs and Vanderborght, 2017). Some countries have similar programs to the UBI since they universally deliver certain amount of money to children and the elderly, establishing age as their only requisite.

thing¹⁸— have pushed the argument for the viability of an UBI in Hispanic American countries.

In Mexico, an emergency transference has yet to be created for the pandemic, but the UBI debate has begun here as well. As it will be analyzed in the following section, its implementation is not only necessary but also feasible.

3. THE TIME FOR AN UBI IN MEXICO

By September 20, 2020, 30,905,162 contagion cases had been registered all over the world, with 965,600 deaths caused by the SARS-CoV-2 virus. Mexico held the seventh place with the largest number of confirmed cases, with 697,663, and in fourth place with the largest number of deaths, with 73,493, which is why it was one of the most affected countries by the COVID-19 pandemic from a public health standpoint.

The pandemic has had a serious impact on the Mexican economy. In its report of August 26, 2020, the Bank of Mexico described the strong fall of the second quarter of 2020: in comparison to the year's first quarter, automobile exports decreased by more than 80%, manufacturers by 30% and oil by 40% respectively (Banxico, 2020, p. 19). Also, gross fixed investment (in machinery, equipment and construction) came in on its lowest level in the last 20 years (Banxico, 2020, p. 22), while the GDP contracted by 17.05%, which was “the largest quarterly fall in the history of this indicator” (Banxico, 2020, p. 24).

From the job market standpoint, the employed population was reduced in April by 12.5 million people (10.4 million informal workers and 2.1 million formal workers) and the unemployment rate went from 2.9% in March to 4.7% in April (Banxico, 2020, p. 33).

The Bank of Mexico projected that there could be a negative variation in 2020 of up to 750 thousand job positions (Banxico, 2020, p. 98) and the fall of the GDP could reach -12.8% (Banxico, 2020, p. 97). The Organization for the Economic Cooperation and Development (OCDE by its Spanish acronym) estimates that the GDP's collapse in Mexico could be of -10.220, while the World Bank has a more benevolent assessment and considers that the GDP's fall will only be of -6.621.

18 The main differences between both instruments are the requisites and the coverage. While the UBI is suggested to be given to the whole population without any type of conditions (it must be universal and unconditional), the minimum vital transfereces are only handed out to parts of the population (the most vulnerable ones) with certain demands to be complied with (they are focallized and conditioned).

19 Source: <https://www.worldometers.info/coronavirus/>.

20 Source: <https://www.oecd.org/coronavirus/en/>.

21 Source: https://www.imf.org/external/datamapper/NGDP_RPCH@WEO/OEMDC/ADVEC/WEOORLD.

Problems in the economy damage the population's quality of life. The National Council of Evaluation of the Social Development Policy (CONEVAL by its Spanish acronym), an organization responsible for the official measurement of poverty in Mexico, estimated that the population in extreme poverty could grow by up to 10.7 million people and the population in poverty could increase by up to 9.8 million. The population with an income below the extreme poverty line could go from 21 million people (the measurement from 2018) to up to 31.7 million, which would equate to going from a 16.8% to a 25.3% of the population. While the population with an income below the poverty line would change from 61.1 million people to up to 70.9 million people, which would equate to going from 48.8% to 56.7% of the population (CONEVAL, 2020, p. 37).

For its part, CEPAL estimates that the extreme poverty rate in Mexico will increase by 6.3% and poverty would increase by 7.6%. In comparison with their Latin American counterparts, México would be the country in which the largest increase in extreme poverty would take place and the fourth largest increase in poverty rates, only trailing Argentina, Peru and Brazil. Also, CEPAL calculates that inequality in Mexico will grow by between 5% and 5.9% in the Gini index, which will also be one of the main variations in the region (CEPAL, 2020, p. 11).

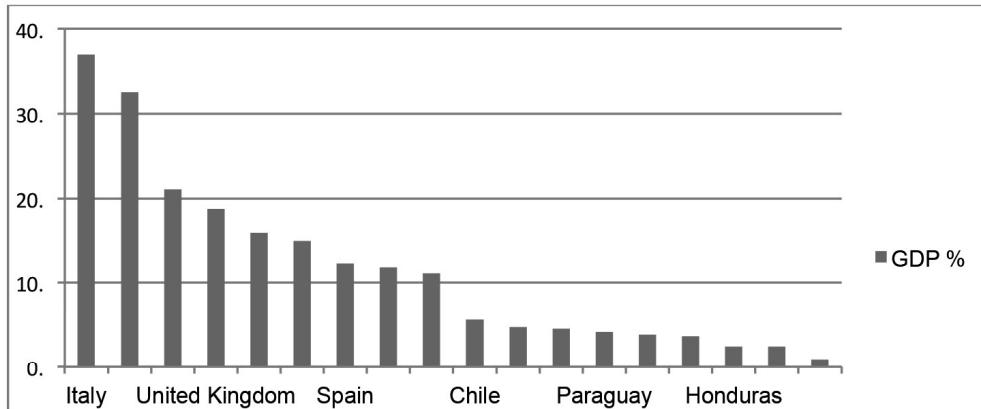
In order to take care of the sanitary, economic and social impact of the pandemic, the federal government has carried out several options that can be grouped in three variations: a) the prevention and attention of the sanitary contingency, such as the temporary hiring of medics and nurses; b) support for households and businesses, such as the extension of the coverage and the advancement of transferences, as well as credits for microbusinesses; and c) support for state and municipal governments, advancing federal transferences (CONEVAL, 2020b, pp. 22-23).

According to the Bank of Mexico, those measures have had a cost of 242.4 million pesos, which represents 1% of the GDP estimation for 2020 (Banxico, 2020, p. 84). This fiscal effort by the Mexican government looks scarce when compared to the ones that other countries have committed to. For example, with information from May 21, 2020, in order to deal with the impact of the pandemic, Italy destined amounts equating 37% of its GDP; Germany assigned an amount similar to 32.5% of its GDP; Japan 21.1% of its GDP; the United Kingdom used 18.8%; France used 16%; the United States 15%; Spain 12.2%; and Canada an amount equal to 11.8% of its GDP (Banxico, 2020, p. 13).

Even in comparison with its regional counterparts, the Mexican amounts seem scarce: according to data from May 20, 2020, in order to deal with the pandemic, El Salvador destined an amount equal to 11.1% of its GDP;

the amount that Chile used represented 5.7% of its GDP; Peru used 4.8%; Brasil 4.6%; Paraguay 4.2%; Argentina 3.9%; Panamá 3.7%; and Honduras and Guatemala 2.5% of its GDP. In Latin America, only Costa Rica (0.8%), Uruguay (0.7%), Dominican Republic (0.7%) and Haiti (0.2%) destined a lesser amount than that of Mexico (CEPAL, 2020d, 25).

FISCAL EFFORTS TO FACE THE SANITARY EMERGENCY OF COVID-19



Source: Elaborated by the author based on (Banxico, 2020) and (CEPAL, 2020d).

Note: Numbers correspond to information gathered until May 20, 2020, for Latin American countries, and May 21, 2020, for the rest of the countries.

The scale of the impact of the pandemic and the small amount of financial resources caused the Mexican academia, civil society and legislative powers to rise up with a demand to implement a new monetary transference called Minimum Vital Income (IMV by its Spanish acronym) and even an UBI.

In its third official report on COVID-19, published on May 12, 2020, CEPAL proposed Latin America to implement a basic income during three months, which would allow an advancement towards an UBI (CEPAL, 2020c, pp. 15-19). One day before, CONEVAL published a study on social policy in Mexico within the context of the pandemic and suggested a Basic Citizen Income as an institutionalized long term measure in order to guarantee security before risks (CONEVAL, 2020, p. 58).

On May 5, 2020, ninety five legislators in the Mexican Chamber of Deputies from six different parliamentary groups presented a point of agreement for discussing the establishment of a Sole Vital Income for three months in order to support all of those affected by the sanitary emergency.²² In the same Chamber, on June 10, 2020, two different parliamentary groups presented a decree project

²² Source: <http://www5.diputados.gob.mx/index.php/esl/Comunicacion/Boletines/2020/Mayo/05/3665-Diputadas-y-diputados-proponen-Ingreso-Unico-Vital-para-quienes-no-tienen-recursos-economicos-por-la-pandemia>.

for expanding the Law of the Emergency Minimum Vital Income²³ and on June 17, the Democratic Revolution Party (PRD by its Spanish acronym) presented a decree project to issue the Law of Minimum Vital Income for Special Causes.²⁴

In the Senate of the Republic, on June 3, 2020, legislators of the Citizen Movement party presented an initiative with a decree project for issuing the Law of Vital Minimum for Special Situations,²⁵ and on June 16, 2020, a senator from the MORENA party presented an initiative for elevating the right to the Universal Citizen Income to a constitutional rank.²⁶

Organizations from civil society have also manifested in favor of implementing the UBI or some form of emergency transference. By the end of April 2020, OXFAM Mexico suggested some measures to fight inequality like, for example, providing people with no social security with “a direct, monthly and unconditioned monetary support or basic income”.²⁷ In turn, a coalition of civil organizations created a platform to demand the approval of the Vital Income for supporting more than 12 million people that had lost their sustenance due to the COVID-19 pandemic.²⁸ Even a managerial coalition suggested an emergency transference related to formal employment denominated “Solidary Wage”.²⁹

Although these initiatives are not new,³⁰ these recent calls, legislative initiatives and demands to implement an emergency monetary transference find their reason for being in the highest levels of poverty and the inefficiency of Mexican social policies.

In terms of poverty, Mexico has been unable to get outstanding results. Although it has been able to mitigate it in percentage terms, it has increased

23 Source: http://sitl.diputados.gob.mx/LXIV_leg/cuadros_comparativos/2CP2/0182-2CP2-20.pdf.

24 Source: http://sitl.diputados.gob.mx/LXIV_leg/cuadros_comparativos/2CP2/0232-2CP2-20.pdf.

25 Source: https://senadoresciudadanos.mx/sites/default/files/inic_mc_senadoras_senadores_Isnieg.pdf.

26 Source: https://infosen.senado.gob.mx/sgsp/gaceta/64/2/2020-06-17-1/assets/documentos/Ini_Morena_Sen_Batres_Art_4_CPEUM.pdf.

27 Source: https://www.oxfamexico.org/sites/default/files/VIVIRALDIA_OXF_042020-FINAL_SO_0.pdf, p. 7.

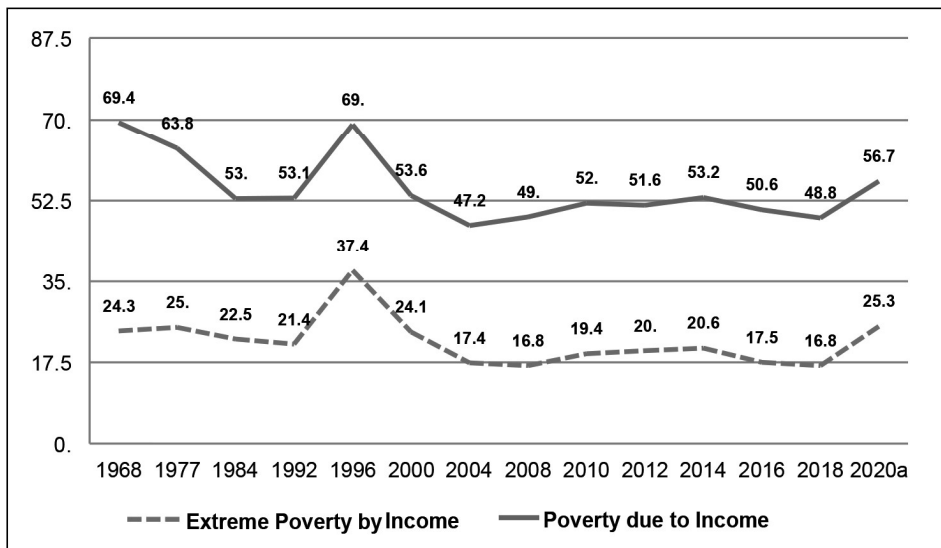
28 Source: <https://www.ingresovital.org/>.

29 Source: <https://coparmex.org.mx/salario-solidario/>.

30 The first documented proposal to implement an UBI in Mexico comes from the book “The unproductive progress” by Gabriel Zaid. In said publication from 1979, the essay writer states that, in order to reduce inequalities, every adult, whether employed or not, should receive a minimum fee (Zaid, 2009, pp. 233-256). Even the UBI has been debated in the Mexican academic realm, its nomination has transcended the judicial, legislatives and electoral realms. In the first realm, in 2016, the National Supreme Court of Justice delivered upon the right to the vital minimum, affirming that it is the right to enjoy minimum benefits and incomes that guarantee sustenance and a decent standard of living, as well as the satisfaction of basic needs (<https://sjf.scjn.gob.mx/SJFSem/Paginas/Reportes/ReporteDE.aspx?idius=2011316&Tipo=1>). In the parliamentary realm four law initiatives had already been set forward to institute an UBI in Mexico in 2007: in 2007 (<http://gaceta.diputados.gob.mx/Gaceta/60/2007/jul/20070706.html#Ini20070706-4>), in 2015 (http://sil.gobernacion.gob.mx/Archivos/Documentos/2015/04/asun_3233355_20150421_1429627747.pdf), in 2016 (<http://gaceta.diputados.gob.mx/PDF/63/2016/abr/20160414-IX.pdf>) and in 2017 (http://sil.gobernacion.gob.mx/Archivos/Documentos/2017/09/asun_3570056_20170912_1505253838.pdf). Also, the UBI was included in the electoral platforms of a presidential candidate in 2006 and of a presidential candidate in 2018. An analyses of the inclusions of UBI in the judicial and legislative realms can be found in (Gutiérrez, 2018).

in real numbers. Extreme poverty due to income went from 24.3% of the population in 1968 to 16.8% in 2018 but this represented an increase, since it went from 11.6 million people with an income below the extreme poverty line due to income in 1968 to 21 million in 2018. In turn, poverty by income went from affecting 69.4% of the population in 1968 to 48.8% in 2018, but such percentages meant 33.1 million people in 1968 and 61.1 million people in 2018. That is, while poverty decreased by 20.6 percentage points, it increased doubly in absolute terms.

PERCENTAGE OF THE POPULATION IN EXTREME POVERTY AND POVERTY DUE TO INCOME IN MEXICO, 1968-2018



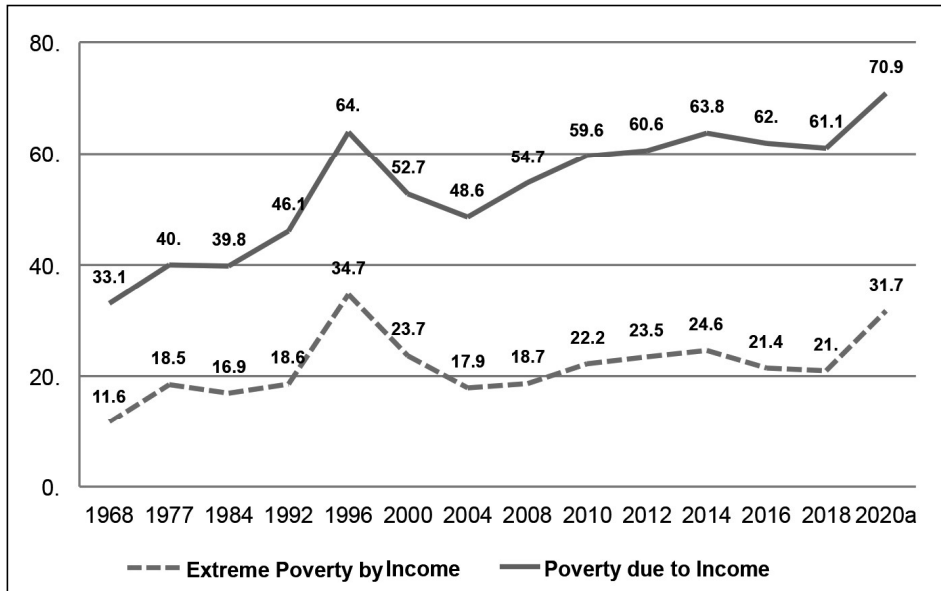
Source: Created by the author based on (Székely, 2005, p. 16) for the period from 1968 to 1984 and “Evolución de la pobreza por la dimensión del ingreso en México”, recovered from <https://www.coneval.org.mx/Medicion/Paginas/Evolucion-de-las-dimensiones-de-pobreza.aspx> for the period from 1992 to 2018.

a. Estimations of (CONEVAL, 2020), scenario II.

Note: The measurements from 1968 to 2004 were identified as “Alimentary Poverty” and “Estate Poverty” and from 2008 to 2018 of the measurements of “Population with an income below the line of extreme poverty due to income” and “Population with an income below the line of poverty due to income”.

If this analysis includes the CONEVAL estimations on the impacts of the pandemic in Mexico, the seriousness of such effects can be observed: the percentage of population in extreme poverty due to income would increase by 8.5%, while the population in poverty due to income would increase by 7.9%. This implies the addition of 10.7 million new people in extreme poverty due to income and 9.8 million of new people in poverty due to income. A catastrophe in a such a short period of time.

ABSOLUTE POPULATION (MILLIONS OF PEOPLE) IN EXTREME POVERTY AND POVERTY DUE TO INCOME IN MEXICO, 1968-2018



Source: Created by the author based on (Székely, 2005, p. 16) for the period from 1968 to 1984 and “Evolución de la pobreza por la dimensión del ingreso en México”, recovered from <https://www.coneval.org.mx/Medicion/Paginas/Evolucion-de-las-dimensiones-de-pobreza-.aspx> for the period from 1992 to 2018.

a. Estimations of (CONEVAL, 2020), scenario II.

Note: The measurements from 1968 to 2004 were identified as “Alimentary Poverty” and “Estate Poverty” and from 2008 to 2018 of the measurements of “Population with an income below the line of extreme poverty due to income” and “Population with an income below the line of poverty due to income”.

Although social policy³¹ cannot eradicate poverty, since it is multifactorial (Banerjee and Dufflo, 2014), it can be a core component for its containment, reduction and for providing social welfare (Lindert, 2011), (Brady, 2005). In the case of Mexico, the structure, dynamics and results of social policy are the product of a large process of edification that came from the political-economical context in which it was constituted.

Thus, Mexican social policy skewed its performance in five ways. The first one is that the foundation of social policy was subjugated to an economical paradigm (Torres and Rojas, 215), since it was conceived that the model of industrialization by substituting imports and the public sector were enough for social welfare. From then on, social policy would be implemented as a palliative for the negative externalities of economic policy.

31 Social policy is defined as the structural framework of understandings, institutions, strategies, resources and actions of governments to comply with social (fighting against poverty and providing social welfare), economic (moderating the failings of the market and of the economic system as well) and political goals (helping the stability and legitimacy of the political system), (Martínez Espinoza, 2019, pp. 19-81).

Since social policy endorsed the industrialization project, the next bias is that social security was structured around formal employment, excluding large part of women, informal workers, the unemployed, peasants and the indigenous (Barba, 2007). Therefore, social protection in Mexico is dual: it is of a certain kind for those with formal employment and of another kind for those who don't. The edification of social protection in Mexico was not "related to the category of citizen, but to that of employee" (Dautrey, 2013, p. 31).

The system of social protection was constructed within a corporative political system (a vertical control that came from the presidency down through official corporations), which is why the third bias is that social protection was also pointed towards helping the stability of the political system: the welfare benefits could be obtained by following the rules of the political system, thus generating a "pact of domination" (Brachet-Márquez, 1996). The favoring and electoral use of social programs feeds this bias.

The fourth bias was the scarce planning and insufficient coordination of the social policy agencies since their domains were created without any integrating strategy (Valencia, Foust and Tetreault, 2012). Here lies the origin of the problems of fragmentation and incoordination of Mexican social policy.

As a result of the economic crisis in the decades of 1970 and 1980, the number of people in poverty incremented exponentially, which is why programs were put together to deal with them in a focalized manner. Social policy focused on attending poverty and the already precarious notion of social welfare was abandoned. However –and this constitutes the final bias–, that strategy has provoked the proliferation of social programs that are fragmented, duplicated, with an inefficient coverage, unaccomplished goals, incorrect designs, scarce transparency and budgeted with no criteria of efficiency or accountability (Martínez, 2019, pp. 130-158).

As a result of this five biases, social expenditure in Mexico has been inefficient for mitigating poverty and providing social welfare, as it has been emphasized in numerous studies. For example, The United Nations Program for Development identified that federal expenditure in health and income transferences tended to be more regressive than the one in education,³² so "the distribution of the so-called federal expenditure in human development promotes inequality instead of correcting it" (PNUD, 2011, p. 16).

In a recent study on the geographic distribution and the beneficiaries of social transferences, Raymundo Campos, Víctor Delgado and Eduardo Medina identified that there is not enough expenditure in the places that need it the most since they observed that those municipalities with greater poverty are not

32. Transferences that concentrate on low income population are called "progressive", while the public resources that concentrate on higher income strata are called "regressive transferences".

the ones that receive the largest expenditures, emphasizing the case of Chiapas, the state with the largest percentage of poverty and “with the lesser number of social programs per individual in poverty” (Campos, *et al.*, 2018, p. 18).

The incompetence of social policy and public expenditure is confirmed when it is compared internationally. In Mexico, the fiscal system and social transferences reduced the Gini index by -7.96%. However, the reductions were of -25.7 in Ireland, -24.4 in Finland and -23.7 in Belgium,³³ while in Latin America they were of -20.43 in Argentina, -14.26 in Uruguay and -14.12 in Brazil (Lustig, 2017, p. 520). The level of impact of social expenditure in Mexico is only a third of the best levels in Europe and Latin America. John Scott calculated that, between 2010 and 2014, social transferences only diminished a percentage point of the Gini coefficient (Scott, 2017, p. 82). In a study of the Interamerican Bank of Development, it was estimated that the inefficiency of public expenditure in Mexico equated to 4.7% of its GDP in 2016 (Izquierdo, Pessino and Vuletin, 2018, p. 69).

In Mexico, social welfare has always been a pending issue, poverty has been a growing structural problem and the social protection system has wasted public expenditure, which has caused vulnerable groups like women, children, adolescents, the elderly and the indigenous to be in disadvantage for the compliance of their social rights (CONEVAL, 2018). The havoc produced by the COVID-19 pandemic will magnify such characteristics, which is why this is the ideal time for experimenting with a different instrument, such as the UBI, which would have the goal of complying the right for a minimum vital wage.³⁴

In specialized literature, where one can find several implementation proposals for Mexico,³⁵ it is stated that, in order to implement an UBI, one must consider at least four topics: expanse, recipients, cost and financing. These are the overlapping conditions that must be solved for an UBI in Mexico.

What kind of transference would be implemented in Mexico?

The expanse entails the definition of the type of transference that would be adopted; that is, if it would be an IMV (focalized, conditioned and temporary) or an UBI (universal, unconditioned and systematic). In this essay, the implementation of an UBI in Mexico is supported, but it is also suggested that

33 Source https://ec.europa.eu/info/sites/info/files/file_import/european-semester_thematic-factsheet_addressing-inequalities_es.pdf

34 Just as it was laid down by the Supreme Court of Justice of the Nation, the right to a minimum vital wage is a fundamental right added to the 1°, 3°, 4°, 6°, 13, 25, 27, 31 and 123 articles in the Political Constitution of the Mexican United States. The right to a minimum vital wage “constitutes the right to enjoy minimum benefits and income that guarantee sustenance and a decent standard of living to every person, as well as the satisfying of all their basic needs.” (Gutiérrez Lara, 2018, p. 19).

35 For example, those of (Gutiérrez, 2018), (Huerta Quintanilla, 2009), (Moreno and Marrufo, 2007), (Scott, 2017) as well as the legislative initiatives of 2016 and 2017.

its application must be progressive in order to gradually solve the different institutional, budget and even ideological reluctances that may oppose it, which is why it is convenient to start with an IMV with perspectives to expand it to become an UBI.

Who would be the beneficiaries?

The proposed UBI would begin as an IMV in which the rightful claimants would be women and men of 18 years and older that are unemployed or employed with just 1 minimum wage as salary, i.e. the most vulnerable in terms of income.

According to official projections, in 2020, the number of people of 18 years and older would increase to 88.3 million (CONAPO, 2018). According to data from the National Institute of Statistics and Geography, the employed population that received more than 1 minimum wage in the last quarter of 2019 were 33.6 million people.³⁶ These people would not receive an UBI initially, while the universe of beneficiaries (all of those who do not receive an income or only earn one single minimum wage) would be 54.7 million people.

How much would the investment cost?

Specialized studies have established that the cost of an UBI would be around barely less than 2% of the GDP and up to 20%. John Scott calculated that a perfectly focalized transference to eliminate extreme poverty in Mexico would have cost 1.72% of the country's GDP in 2014 (Scott, 2017, p. 72). CEPAL forecasts that an emergency basic income for all of the population during six months would cost 2% of the GDP and, for 12 months, 5.2% (CEPAL, 2020, p. 22). The 2016 and 2017 legislative initiatives fixed the total cost of an UBI in between 8.35% and 9.35% of the GDP, while Aníbal Gutiérrez created several scenarios with different costs that go from 8.5% to 19.9% of the GDP of 2017 (Gutiérrez, 2018, p. 28).

The investing costs are subject to the number of recipients, the amounts they receive and the stages of implementation. In this proposal, it is suggested that the amount is based on the value of the urban basic food basket, which was \$1,661.39 (sixteen hundred and sixty one pesos 39/100 M.N.) according to the estimate of CONEVAL, with amounts adjusted to the COVID-19 emergency in August, 2020.³⁷ The ideal would be that the initial amount was based on the poverty line due to income (basic alimentary and non-alimentary basket), that is \$3,238.64 (thirty two hundred and eight pesos 64/100 M.N.) according to

³⁶ Source: <https://www.inegi.org.mx/app/tabulados/default.html?nc=602>

³⁷ Source: https://www.coneval.org.mx/Medicion/Documents/Lineas_bienestar/Lineas_de_pobreza_COVID_19_agosto_2020.pdf

the official estimation, but this would limit the number of beneficiaries and, therefore, the impact of the transference. The suggestion then is to budget based upon the initial amount of the urban basic food basket, while also laying out an increment on the amounts as the UBI becomes more feasible.

So the initial cost of the UBI would begin with a three month IMV (October, November, December) of a monthly amount of \$1,661.39 for 54.7 million people, which generates a total investment of \$272, 634, 099, 000 (two hundred and seventy two billion six hundred and thirty four million ninety nine thousand pesos).

COSTS FOR THE IMPLEMENTATION OF UBI IN MEXICO

Individual monthly amount	Monthly amount for the whole universe of beneficiaries	Total UBI amount for the October-December 2020
\$1, 661.39 ^a	\$90, 878, 033,000 ^b	\$272, 634, 099,000 □

Source: Created by the author

a. Established according to the value of the urban basic food basket estimated by CONEVAL for August 2020.

b. Estimated for 54.7 million people.

How would it be financed?

The different models of UBI implementation usually suggest that its financing must be accompanied by a fiscal reform. This a transcendental topic since Mexico occupies the last place in tax collection of all the countries of the OCDE and is five places away from occupying the last place on all the countries in Latin America and the Caribbean.³⁸

Tax reform is a pressing affair for the country and will be a factor that grants sustainability to the UBI, but the proposal is that the UBI's initial financing is not subject to said reform, nor to a debt acquisition, but that it comes from a multilateral fund created by three types of sources.

The first source of financing is to use the resources of the Program for the Welfare for People in Social or Natural Emergencies, which has the objective of mitigating the negative effects provoked by natural or social phenomena in people. In 2020, the program had a budget of \$703, 030, 456 pesos.³⁹

The second proposal of financing is to reorient social expenditure, eliminating duplicated and deficient social programs. According to the final

38 Source: "Estadísticas tributarias en los países de la OCDE", available in: <https://www.oecd.org/tax/tax-policy/tax-as-percentage-of-gdp-oecd.png> and "Estadística tributarias en América Latina y el Caribe", available in: <https://www.oecd.org/tax/tax-policy/brochure-estadisticas-tributarias-en-america-latina-y-el-caribe-2019.pdf>

39 Source: https://www.pef.hacienda.gob.mx/work/models/PEF2020/docs/20/r20_ppcer.pdf

analysis from CONEVAL, 26 programs were identified with a 100% similarity with one or more programs and 23 with a 98% similarity (CONEVAL, 2020b, p. 207). Suppressing eight of the duplicated social programs, \$108,021,877,689 (a little over one hundred and eight billion pesos) could be obtained.⁴⁰

Public expenditure can also be reoriented by eliminating social programs that have had low results in the CONEVAL evaluations (indicator advancement, coverage and priority for contributing to the fight against poverty and support social rights). Doing without nine social programs with the worst results in 2018 and 2019 \$7,773,507,029 (close to 8 billion pesos) could be obtained.⁴¹ Which, added to duplicated programs, would total a final amount of \$115,795,384,718 (one hundred and fifteen billion seven hundred ninety five million three hundred eighty four thousand seven hundred and eighteen pesos).

A third source of financing is the use of the primary surplus (the difference between the government’s income minus the resources to be exert), which in 2020 ascended to 200 billion pesos (CONEVAL, 2020, p. 83).

Altogether, an amount of \$316,498,415,174 (three hundred sixteen billion four hundred ninety eight million four hundred fifteen thousand one hundred seventy four pesos) could be taken into account.

INITIAL BUDGET FOR FINANCING AN UBI IN MEXICO

Source	Amount
Program for Welfare of People in Social or Natural Emergencies	\$703, 030, 456
Social expenditure reorientation	\$115, 795, 384, 718
2020 primary surplus	\$200, 000, 000,000
Total	\$316, 498, 415, 174

Source: Created by the author

With this financing, an IMV could be defrayed with a monthly amount of \$1,661.39 pesos during three months for 54.7 million people, according to the estimation of the costs in the latter section and there would be an surplus of \$43,864,316,174 pesos.

Aside from a tax reform, in order to make an UBI sustainable for the future it is suggested to diversify its financing, for which two avenues could be considered: 1) to use some resources of the budget branches number 30

40 For this exercise seven duplicated programs from the Secretariat of Public Education and one program from the Secretariat of Agriculture and Rural Development were taken into account. Duplicated programs from the Secretariat of Health considering that this budget could be destined to the same secretariat for tending this sanitary contingency. The listing and analysis of the similarity among social programs can be found in: https://www.coneval.org.mx/Evaluacion/IEPSM/Documents/Resultados_Similitudes_2020.zip.

41 Source: https://www.coneval.org.mx/Evaluacion/IEPSM/Documents/ANALISIS_PEF_2018_2019.pdf

(debts from former fiscal exercises) and 33 (federal contributions to states and municipalities), as well as the National Lottery for Public Assistance; 2) to establish the UBI as an authorized donation that could receive non-onerous donations allowing for tax deductions.

4. FINAL CONSIDERATION: IN FAVOR OF AN UBI IN MEXICO

Poverty and inequality are routine pandemics in Mexico which are becoming more serious with the sanitary contingency caused by the SARS-CoV-2 virus. To deal with an emergency situation with structures and instruments that have proven their inefficiency does not seem to predict better results. Moments of urgency demand daring solutions. Measures are needed that recognize previous failures, that tend to their obligation in a tidy manner and that can be carried out swiftly; i.e. measures that are rational, responsible and feasible. Here is a proposition for one such measure: the Universal Basic Income (UBI).

An UBI in Mexico would have considerable benefits. In the first place, it would have a positive impact at an economic level by guaranteeing an income to the most vulnerable sectors of society in the context of a crisis, thus favoring demand and consumption.

In the second place, an economic spill would be generated in the direct spending of each beneficiary, thus translating into demand in the communities with lesser incomes, favoring their economic activity (Gutiérrez Lara, 2018). The UBI is a direct economic measure with tangible and immediate effects.

Also, the UBI would favor the redistribution of wealth without elevating salaries nor the unitary costs of businesses. Therefore, it would not have an opposite effect on the national production (Quintanilla, 2009, p. 91). These economic benefits would result in other social advantages, such as an impulse on the diminishing of social scarcities and a greater community cohesion.

Since it would be a direct transference, the UBI has a greater implementation ease than other support schemes based on numerous conditions, thus reducing bureaucratic costs and allowing the eradication of opportunism, political compromises, state bureaucracy and diversion of resources (Gutiérrez Lara, 2018, p. 17). Also it would help to avoid overspending the public expenditure on inefficient social programs.

The UBI, then, has advantages that President Andrés Manuel López Obrador has pointed as the axis of his social policy: it is a benefit that reaches people directly, without intermediaries; it has an immediate effect on people's income; and it is financed without increasing the public debt, nor requiring the cancelation of his mega-projects and primary social programs.

In order to face the struggles of the Great Depression in his country, President Franklin D. Roosevelt proposed a group of interventionist measures that would become known as the “New Deal”. The New Deal had many opponents, so, in order to defend it, in one of his public interventions, President Roosevelt declared: *The country demands us to experiment in a bold way. Common sense dictates us to choose one method and put it to the test. If it fails, we must sincerely recognize it and try with another. But above all, let’s try something different.*

Although it didn’t achieved all of its objectives, the New Deal favored economic recovery, strengthened social protection and armored the American political system from authoritarian postures.

The same has happened in Mexico, for example, with public social assistance for people in poverty and the implementation of minimum wages: a furious opposition emerges when such policies are suggested (González, 1985) but, as time passes, it is clear that the effect on social equality is greater when measures are defended and implemented from the State itself.

Oscar Wilde wrote that “stronger than thousand armies is an idea whose time has come”. Víctor Hugo said that taking over utopia means to impose the yoke of reality upon it, transforming it from an abstract notion into a concrete idea that, what will lose in beauty, will gain in usefulness.

With COVID-19 the number of victims of the pandemics of poverty and inequality will increase. We must not normalize this situation and, instead, must once again make an argument for the utopia of social justice. It is therefore convenient to face the future with a social policy proposal that is convincing, fair and feasible. Here is one that must be considered.

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