



Presentación del curso

Desigualdad, procesos de diferenciación y exclusión social

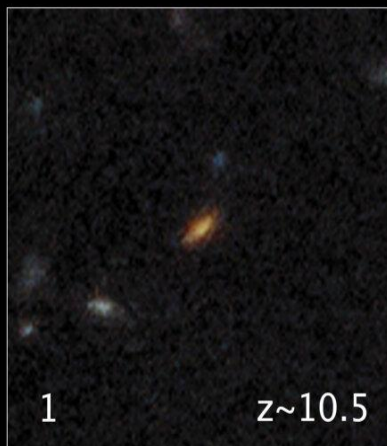
Dr. Héctor Nájera
Dr. Curtis Huffman



PERSPECTIVA



Abell 2744 GLASS
JWST/NIRCam

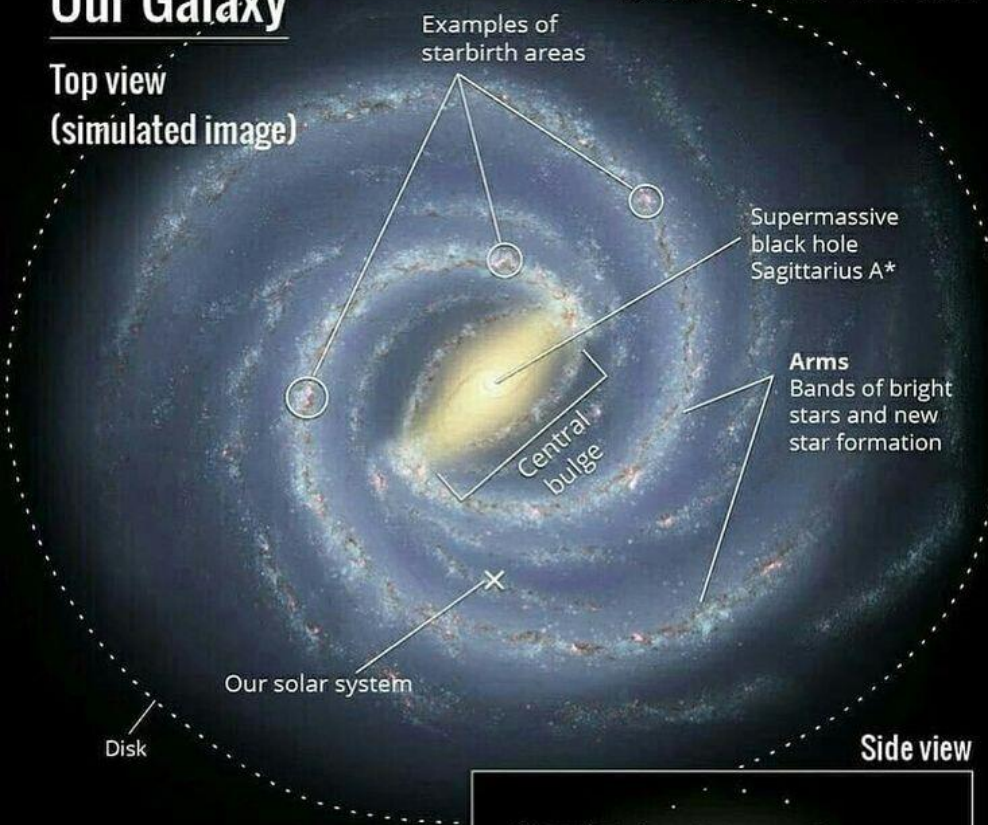




Our Galaxy

Top view
(simulated image)

GALACTIC HOME

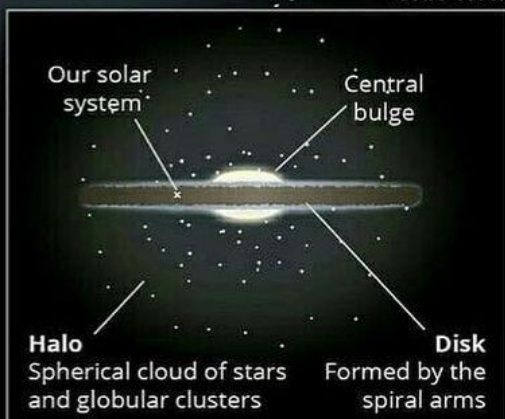


The Milky Way

- a spiral galaxy
- 100,000 light-years across
- 100 billion stars
- 1 supermassive black hole
- contains our solar system

@ASTROMATE

Side view



The Pale Blue Dot

“That's here. That's home. That's us. On it everyone you love, everyone you know, everyone you ever heard of, every human being who ever was lived out their lives. The aggregate of our joy and suffering, thousands of confident religions, ideologies, and economic doctrines, every hunter and forager, every hero and coward, every creator and destroyer of civilization, every king and peasant, every young couple in love, every mother and father, hopeful child, inventor and explorer, every teacher of morals, every corrupt politician, every “superstar”, every “supreme leader”, every saint and sinner in the history of our species lived there – on a mote of dust suspended in a sunbeam.”

— Carl Sagan † 1996

image taken from a distance of 6 billion kilometers

La suma de nuestras alegrías y sufrimientos

Cada creador y destructor de civilizaciones

Cada político corrupto, cada “superestrella”, cada líder supremo en la historia de nuestra especie ha vivido aquí.

Los amos momentarios de la fracción de un pequeño punto han vivido aquí

Nuestro sentido de importancia y el delirio de que temenos alguna posición privilegiada en el universo vive ahí.

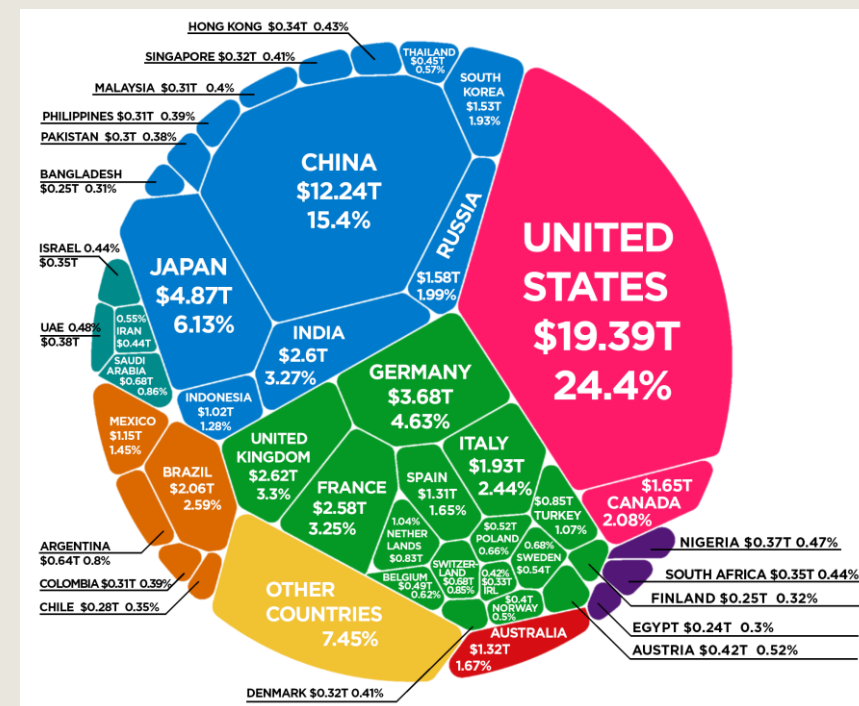
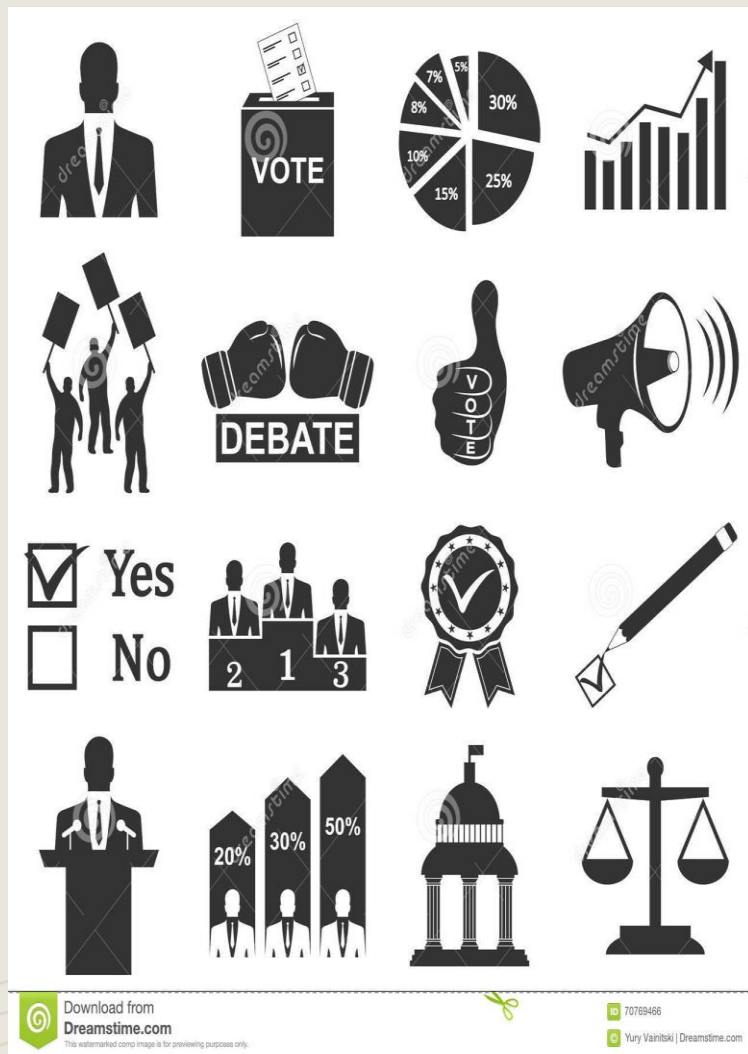




“It has been said that astronomy is humbling and carácter-building experience”

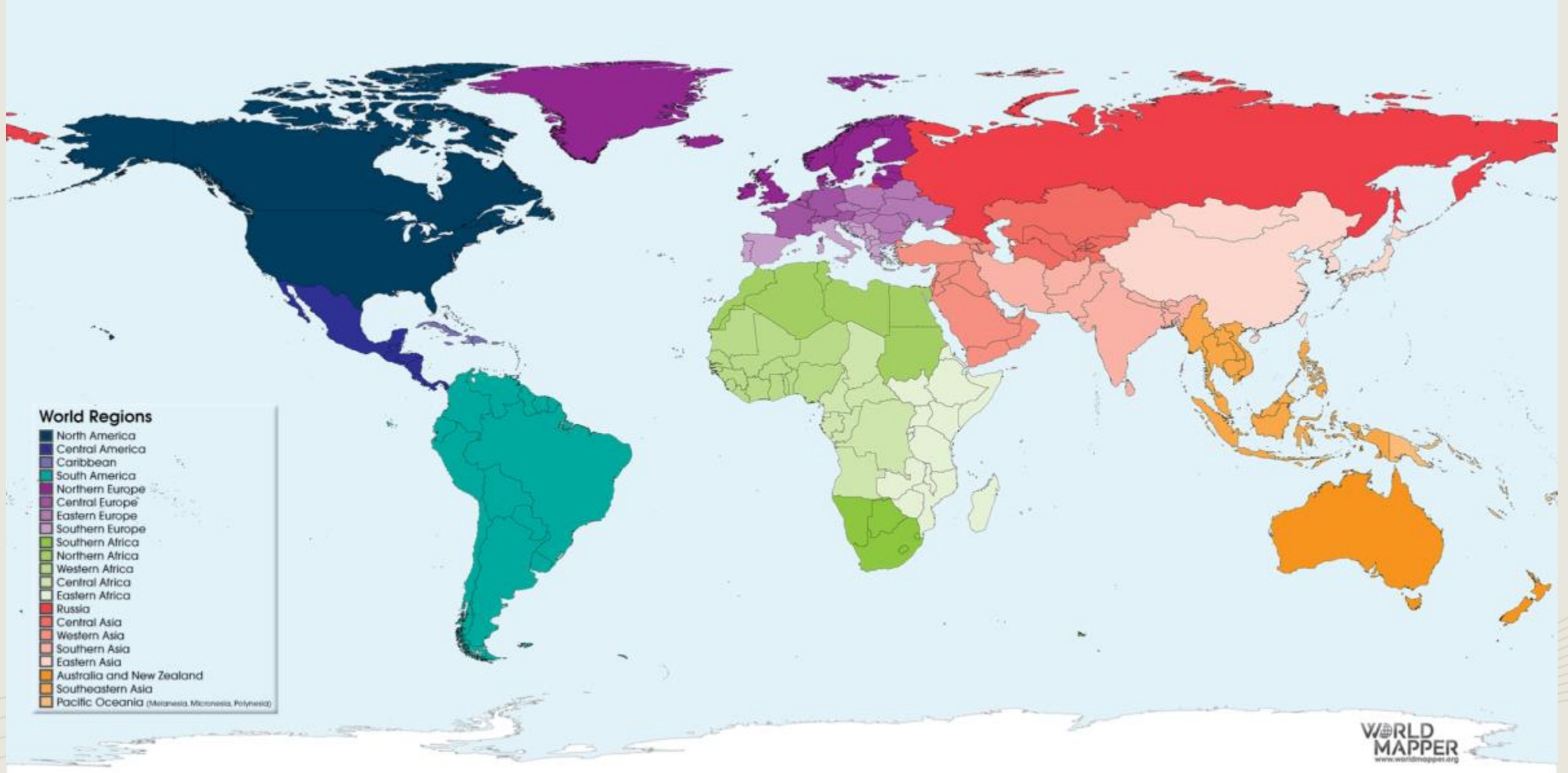


PERSPECTIVA II

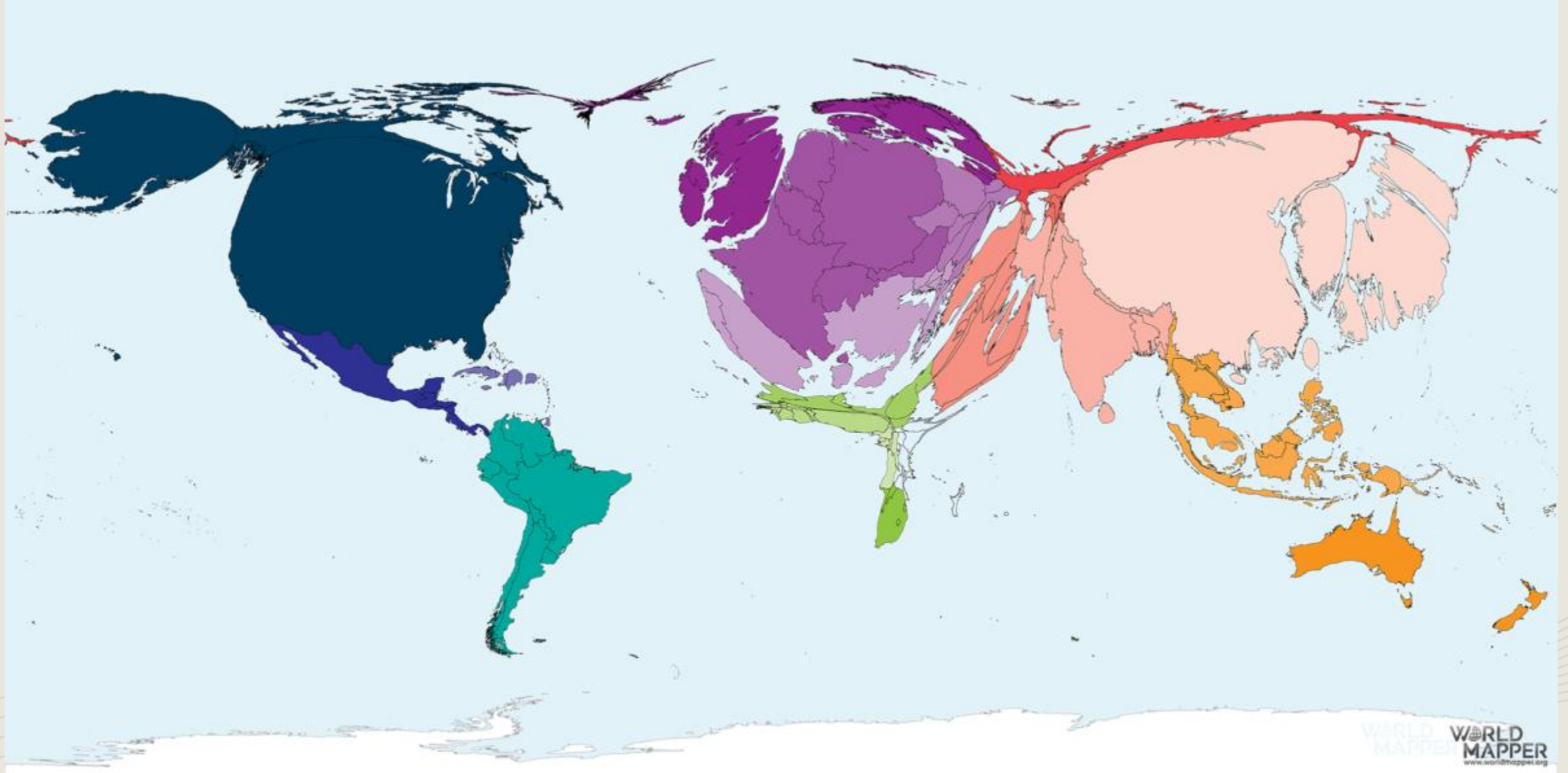




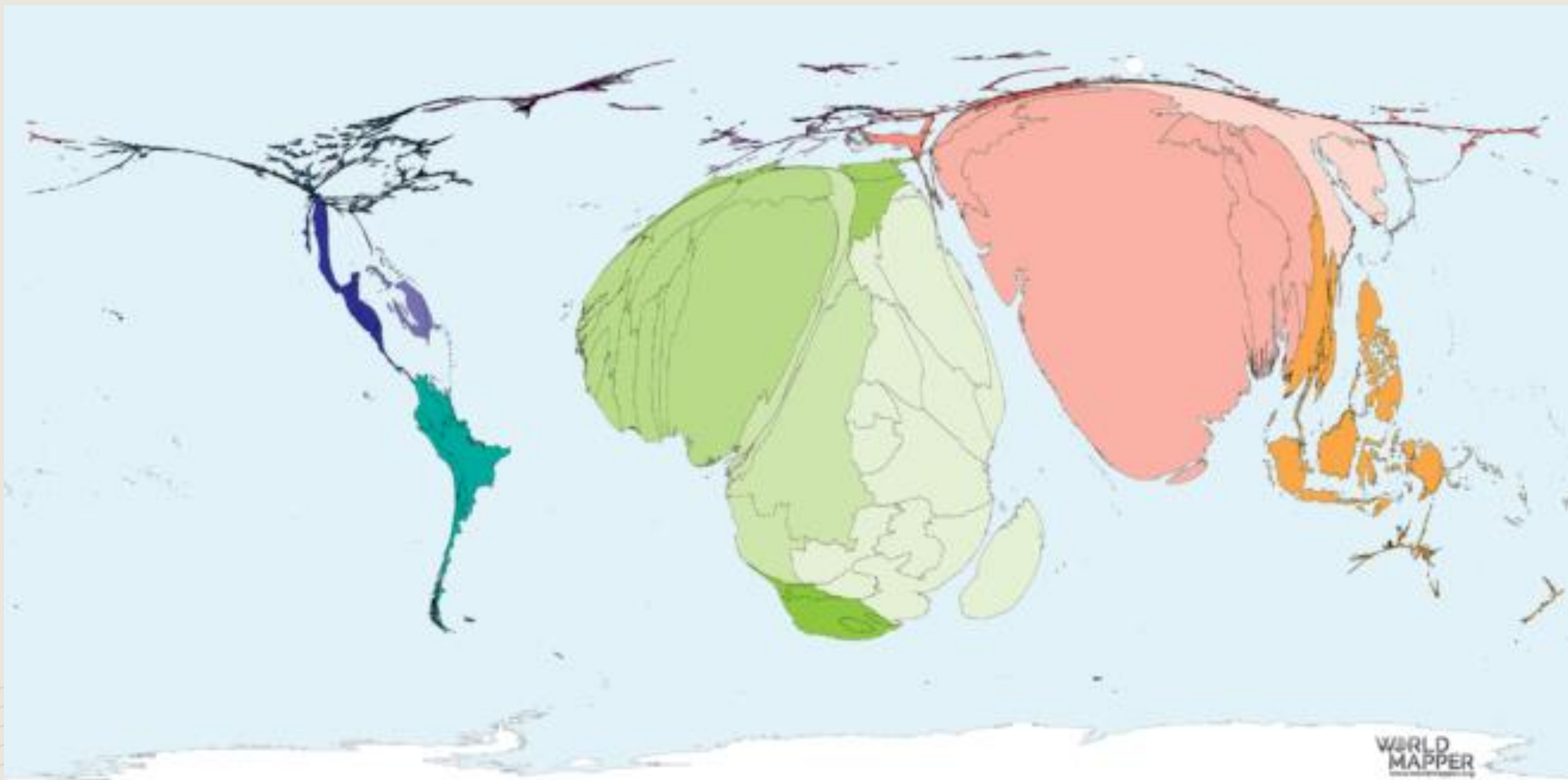
Algunos rasgos de la distribución y uso de recursos a nivel mundial



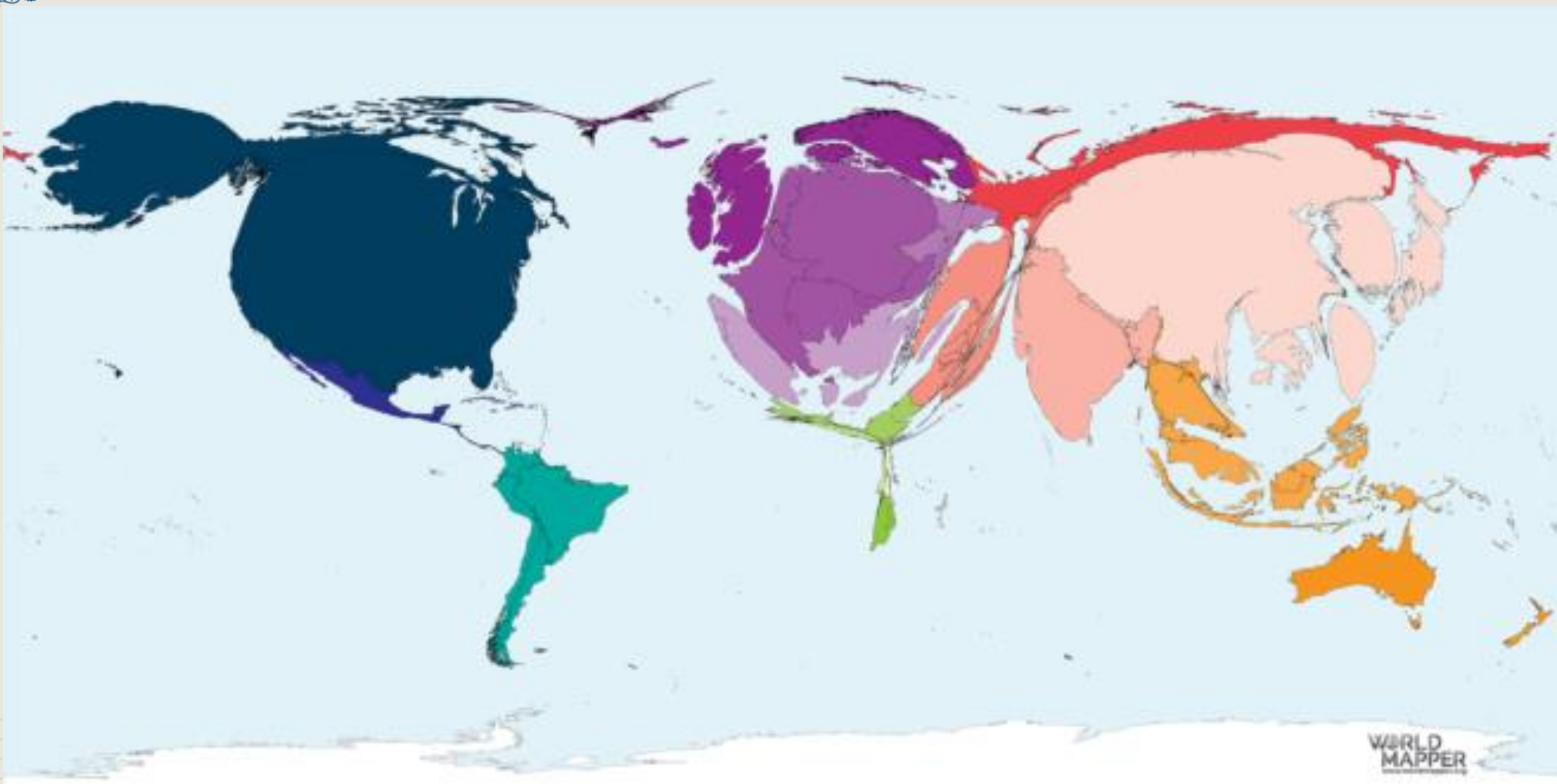
% PIB global



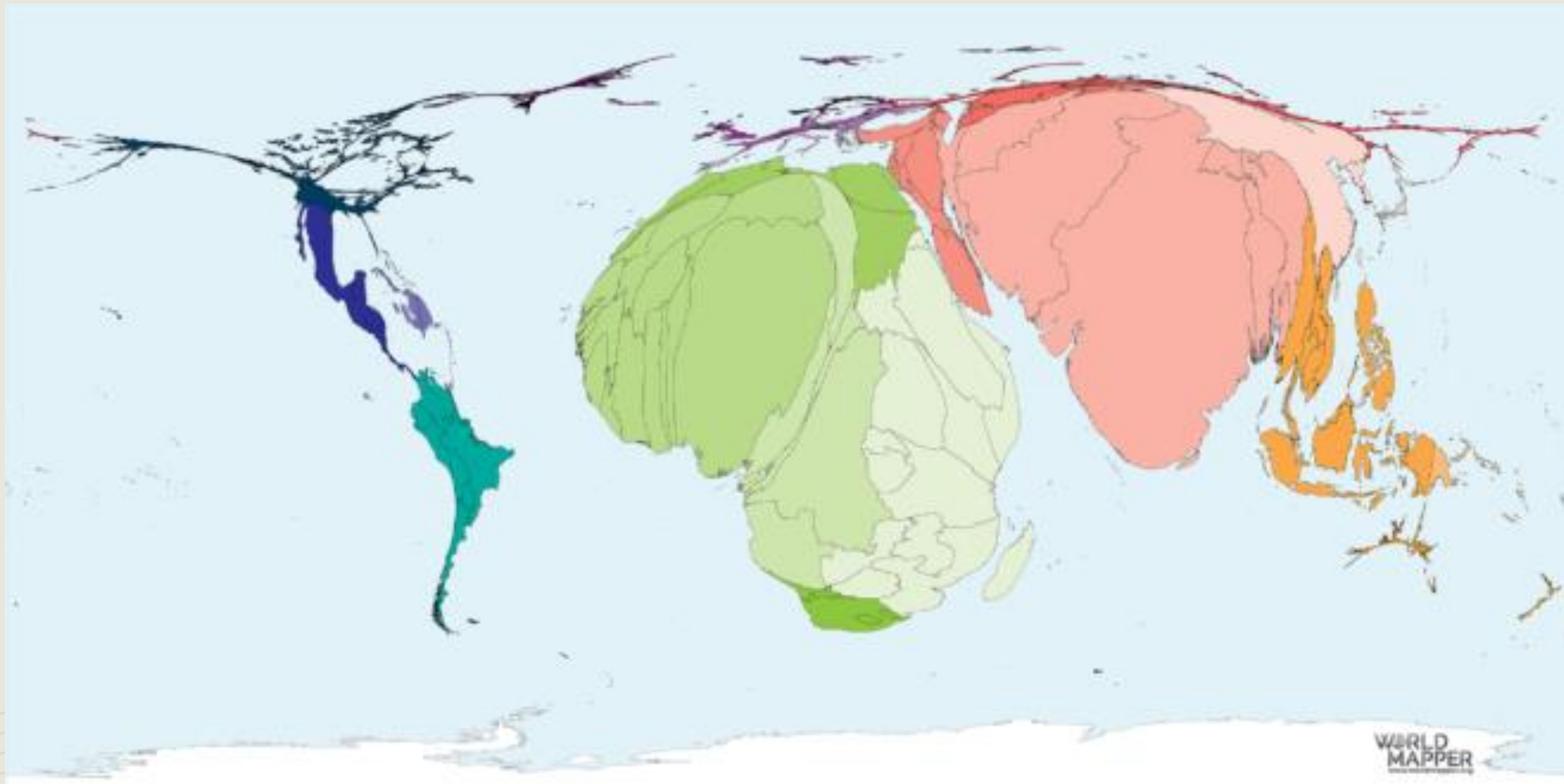
Pobreza absoluta



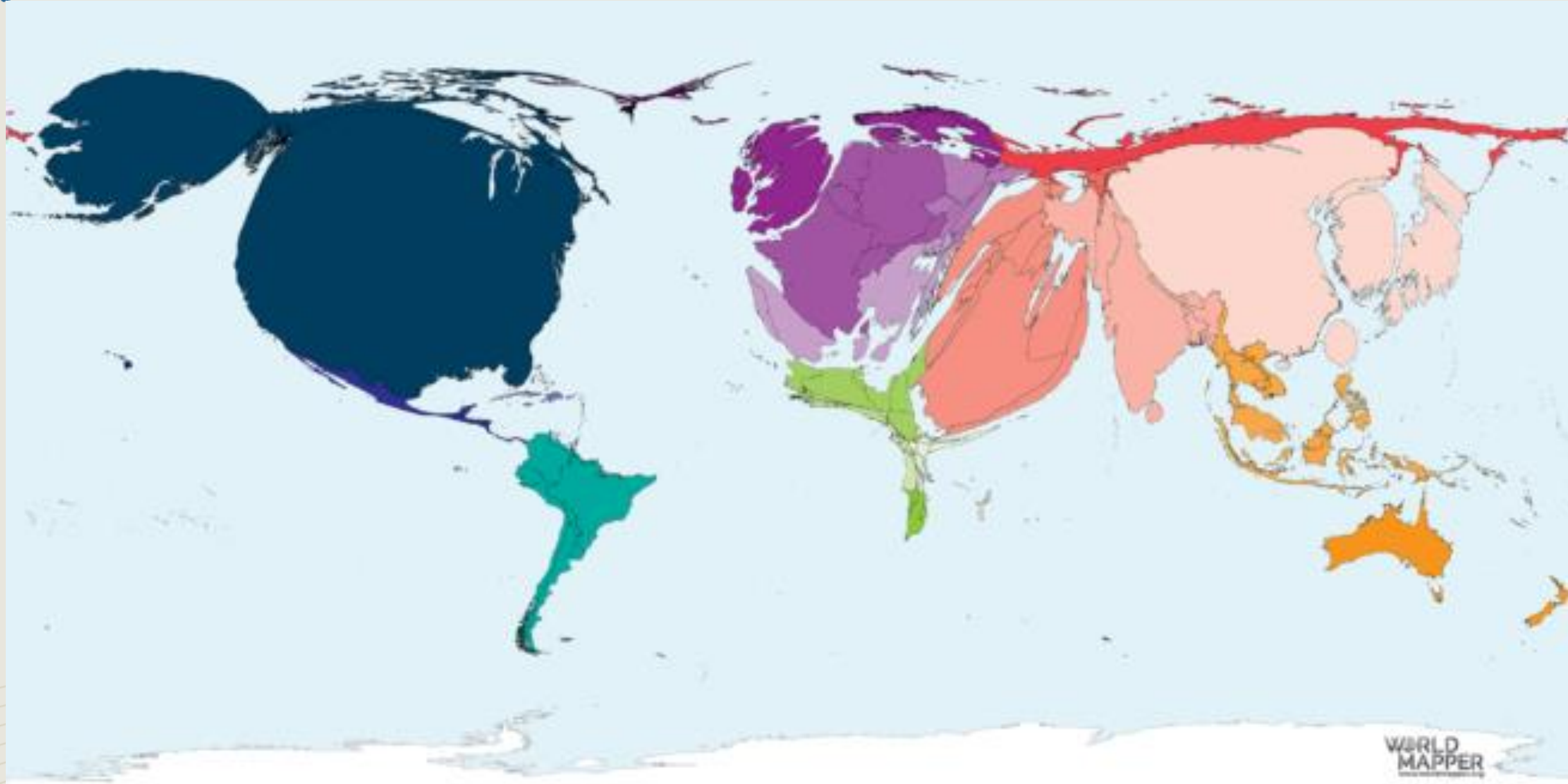
Billonarios



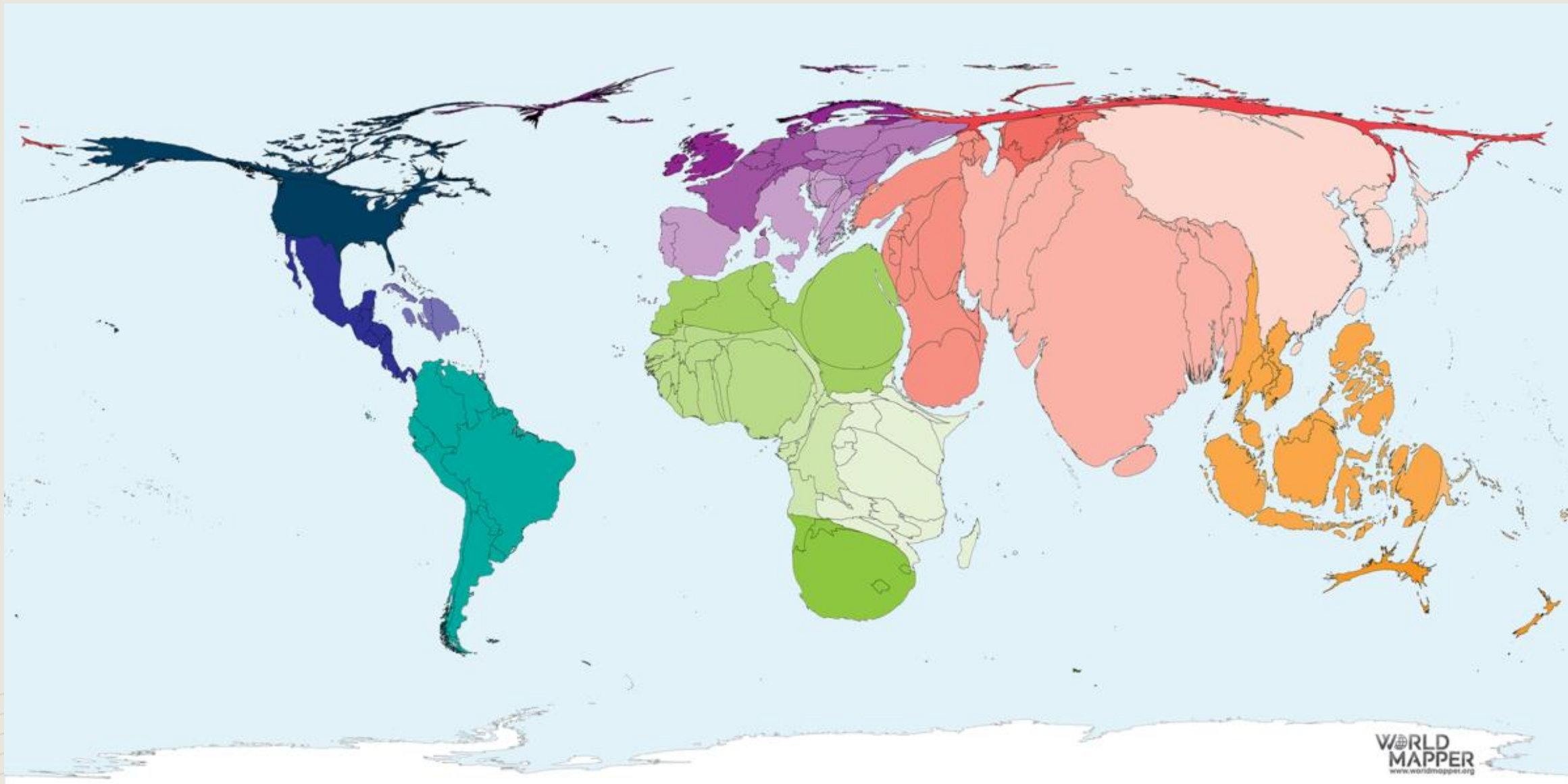
Mortalidad infantil



Gasto en armamento



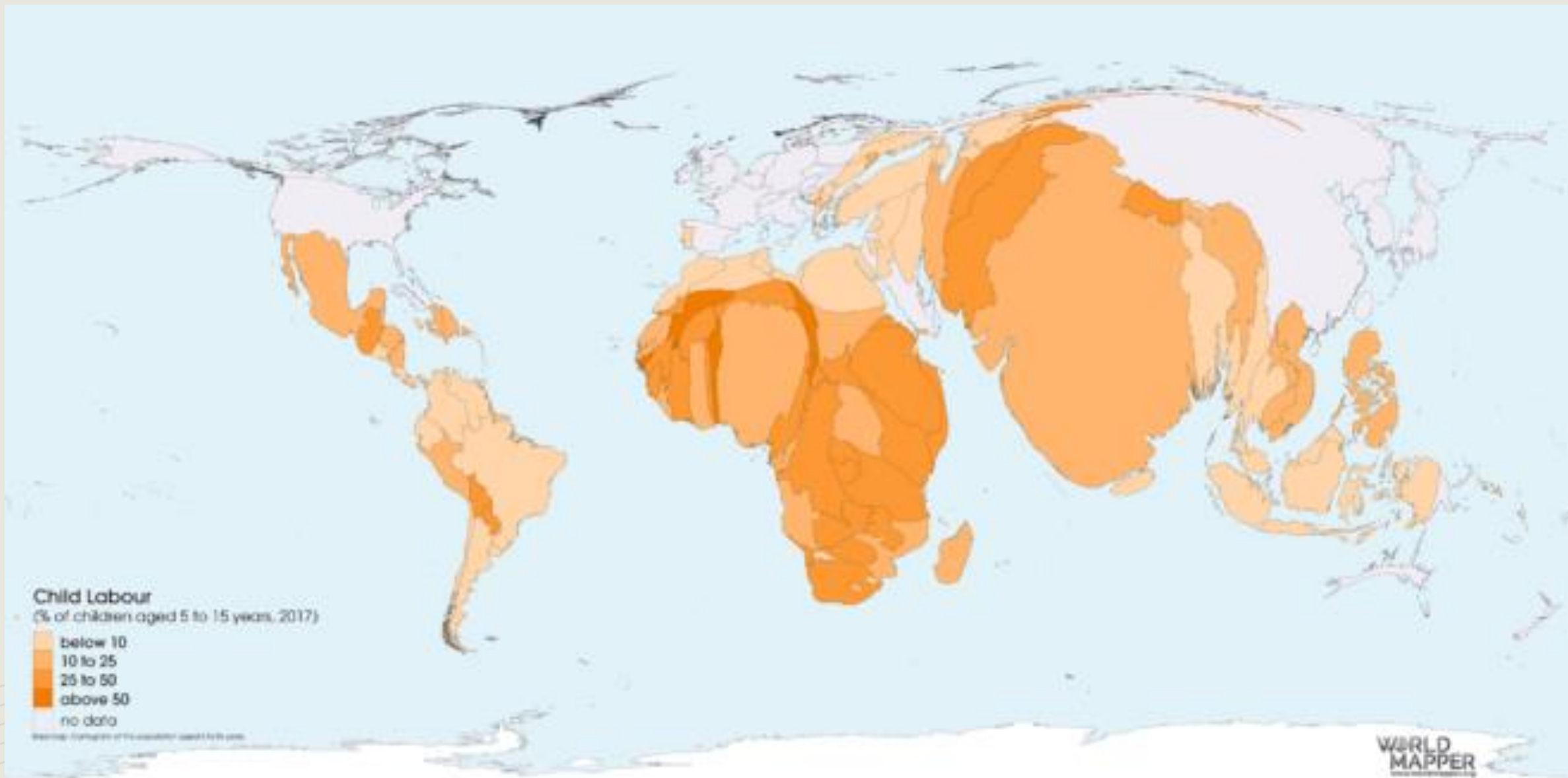
Desempleo juvenil 2015



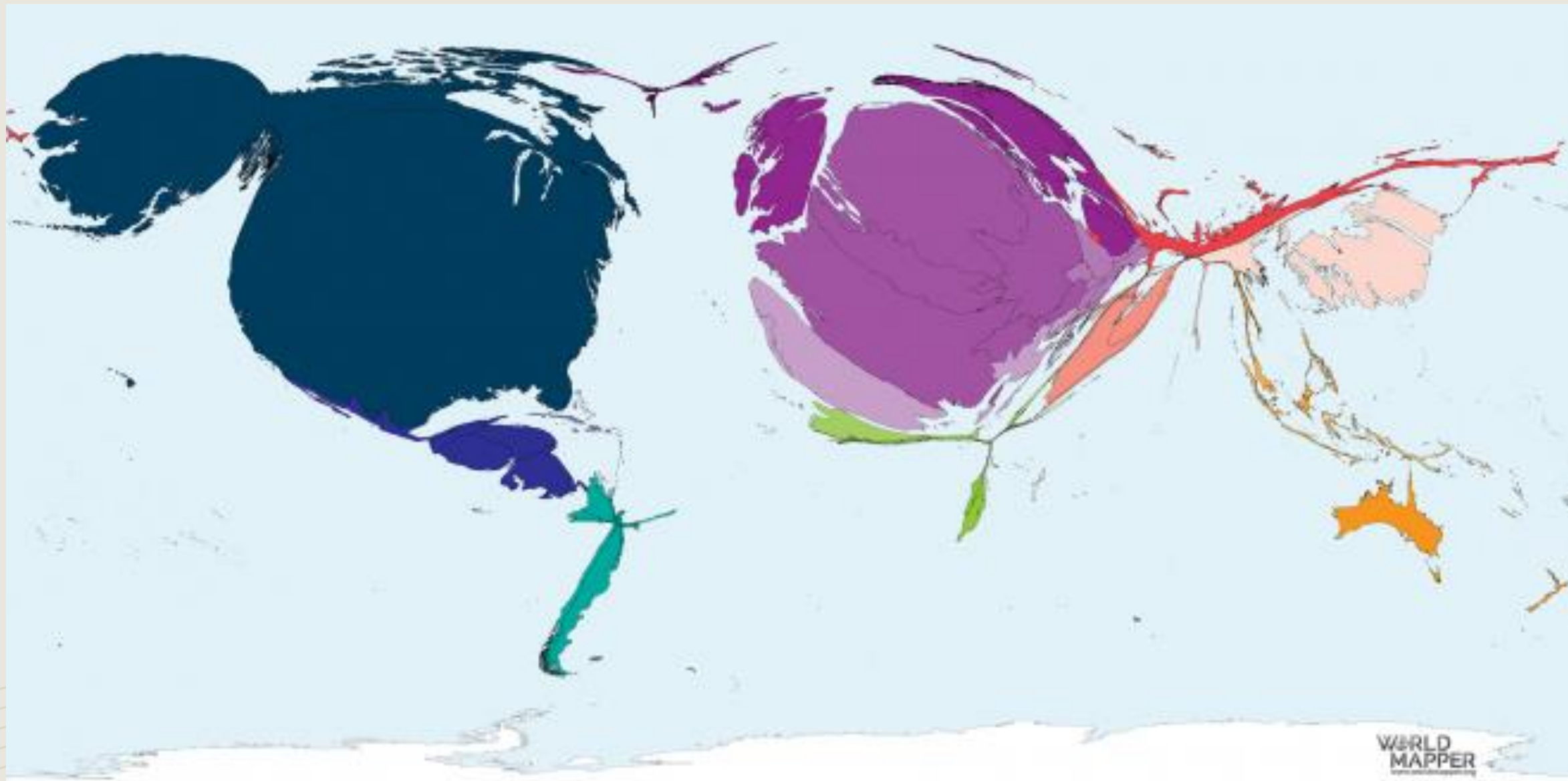


A world map showing the distribution of major world religions by color. The map is oriented with North to the left. The colors represent different religious groups: dark blue for Christianity, purple for Islam, red for Hinduism, orange for Buddhism, green for Judaism, and yellow for other religions. The map is credited to World Mapper.

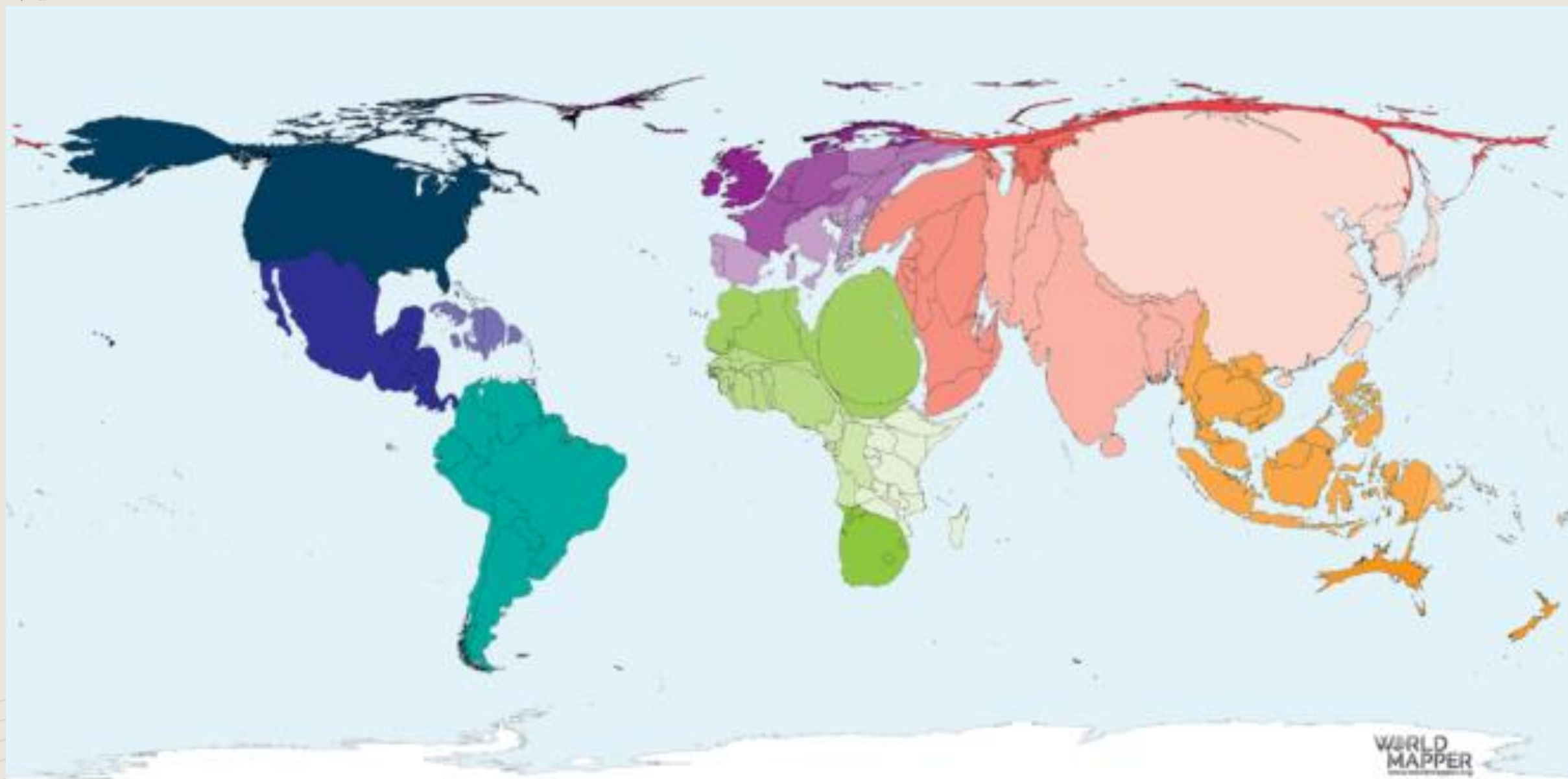
Trabajo infantil



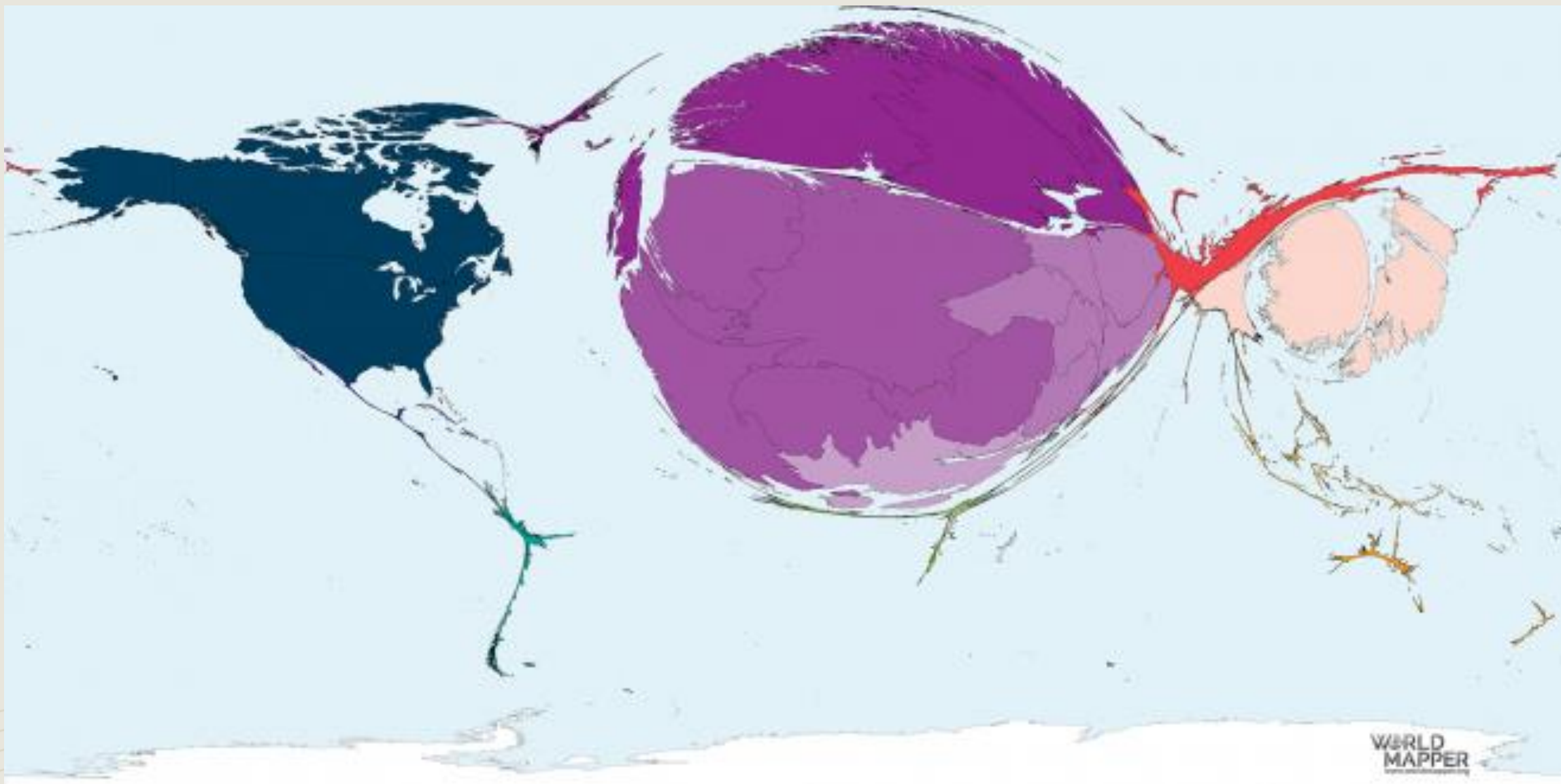
Importaciones de aguacate



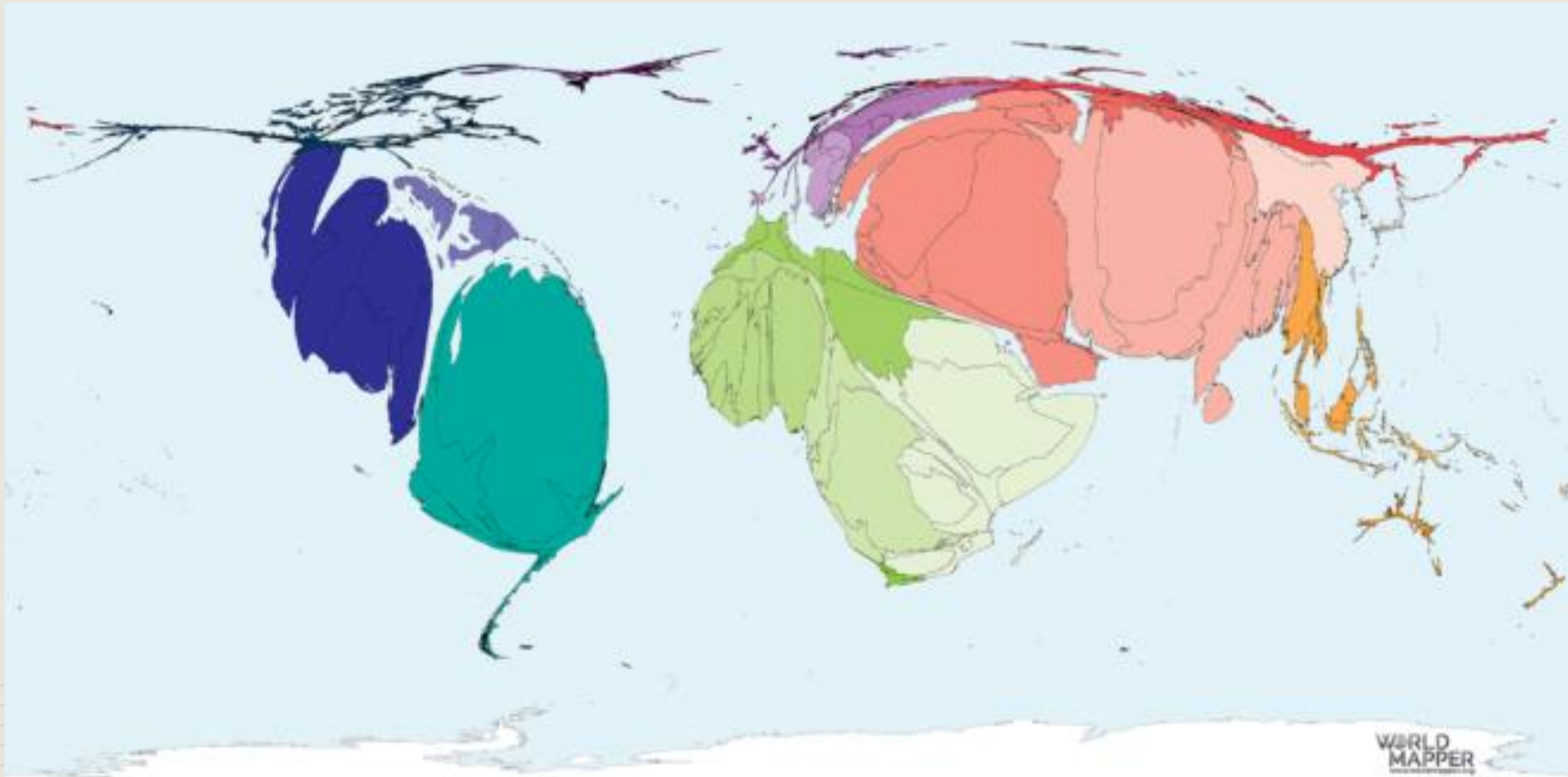
Obesidad infantil



Medallas de oro 2018



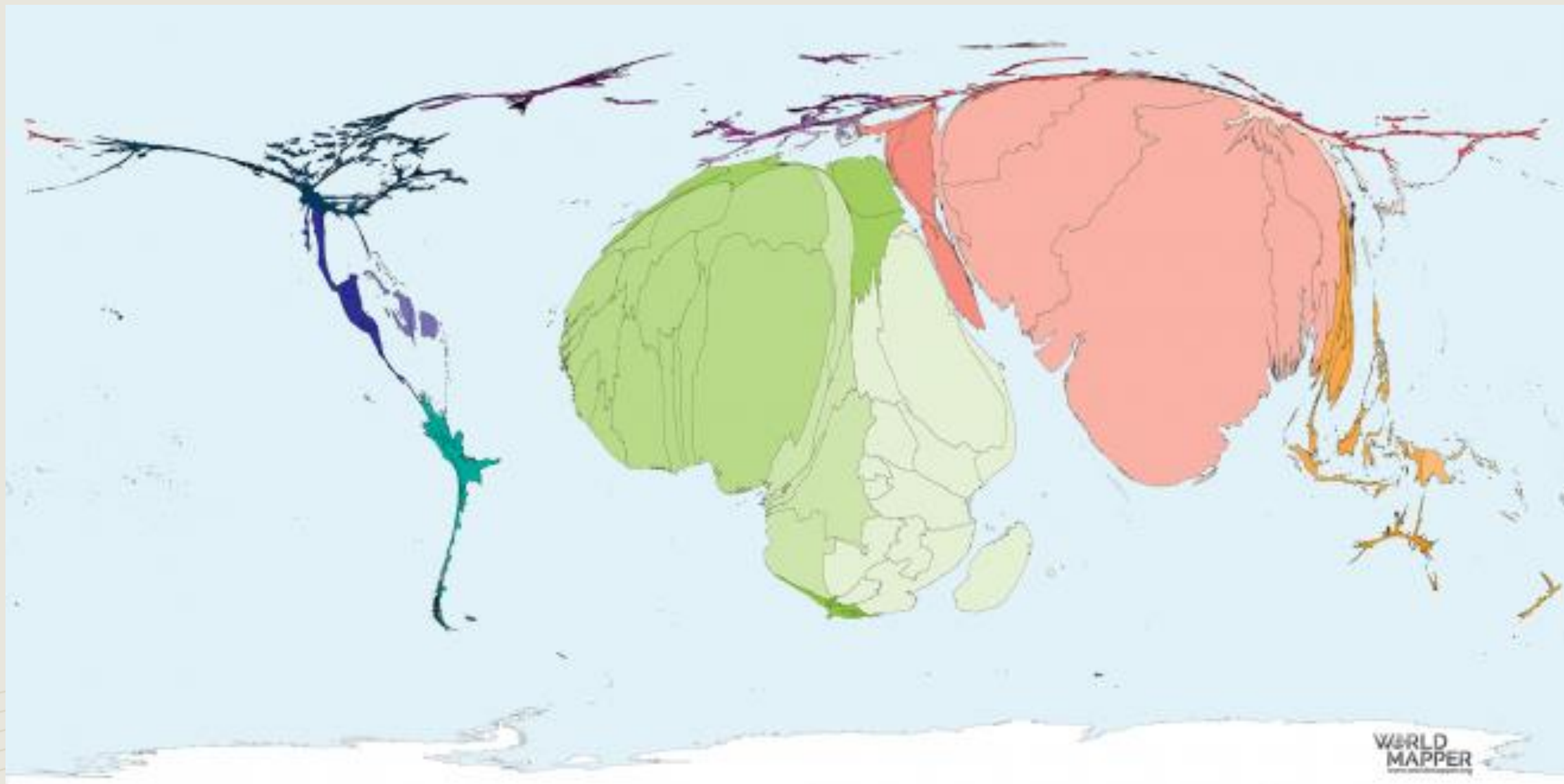
Origen de la población refugiada



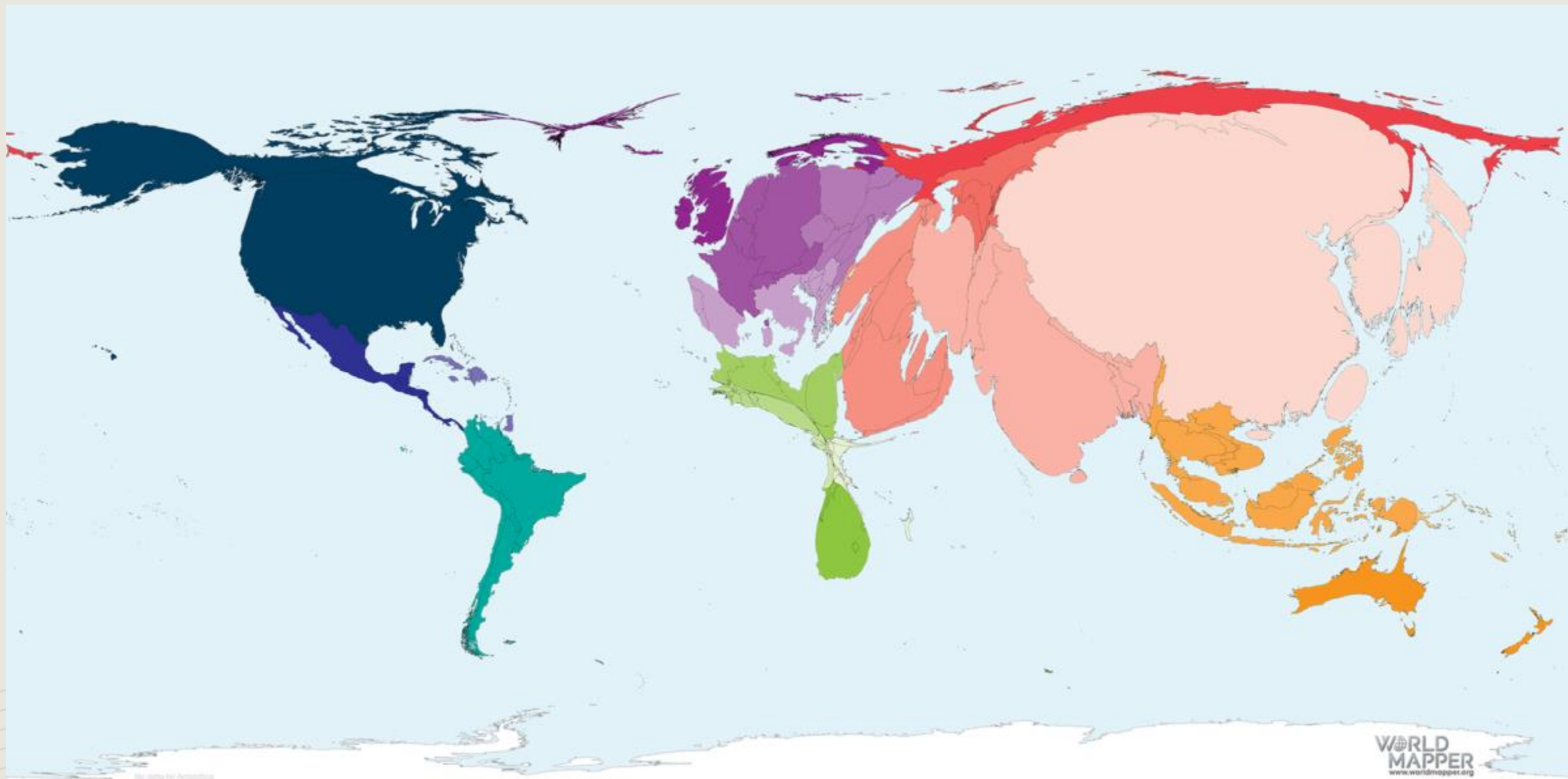




Mujeres analfabetas



Emisiones de CO₂ 2020



Tendencias de la desigualdad global

GLOBAL INEQUALITY

FROM THE TOP

In the Sustainable Development Goals (SDG) of the United Nations, some are directly related to combating inequality¹, such as: **ending poverty** (SDG 1), **ending hunger** (SDG 2), **promoting inclusive economic growth; productive and decent work** (SDG 8), and **reducing income inequality within and among countries** (SDG 10).

However, the gap between global corporate elites and the people continues to widen even after the 2008 global financial crisis:

Between 2008 and 2013, income grew more quickly for the **wealthiest 60%** than the poorest 40%²

The **10 largest global corporations** have higher revenue than governments of 180 countries³

By 2017, **8 people** has the same wealth as the poorest half of the world.⁴



1.6 billion deprived of health, education services and adequate standard of living as of 2016⁵

Half of which come from South Asia and **1/3** from Sub-Saharan Africa⁶

85% of which live in rural areas as of 2014⁷

Expected **201.1 million** unemployed in 2017⁸

¹deprived of health, education services and adequate standard of living

²<http://www.un.org/sustainabledevelopment/sustainable-development-goals/>

³<http://hdr.undp.org/sites/default/files/chapter1.pdf>

⁴https://www.oxfam.org/sites/www.oxfam.org/files/file_attachments/bp-economy-for-99-percent-160117-en.pdf

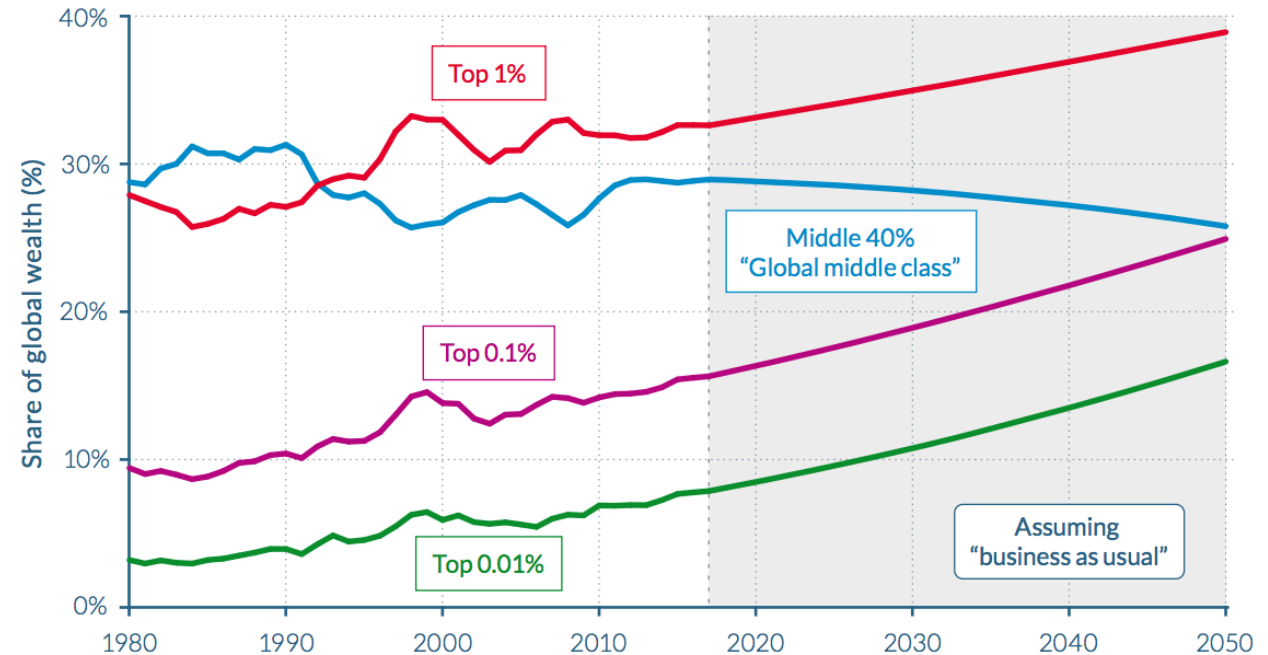
⁵http://www.globaljustice.org.uk/sites/default/files/files/resources/corporations_vs_governments_final.pdf

⁶<http://www.ophi.org.uk/wp-content/uploads/Global-MPI-2016-2-pager.pdf>

⁷<http://www.ophi.org.uk/wp-content/uploads/Global-MPI-2014-an-overview.pdf#0a8ld7>

⁸http://www.ilo.org/wcmsp5/groups/public/-dgreports/-decomm/-publ/documents/publication/wcms_541211.pdf, pg 6

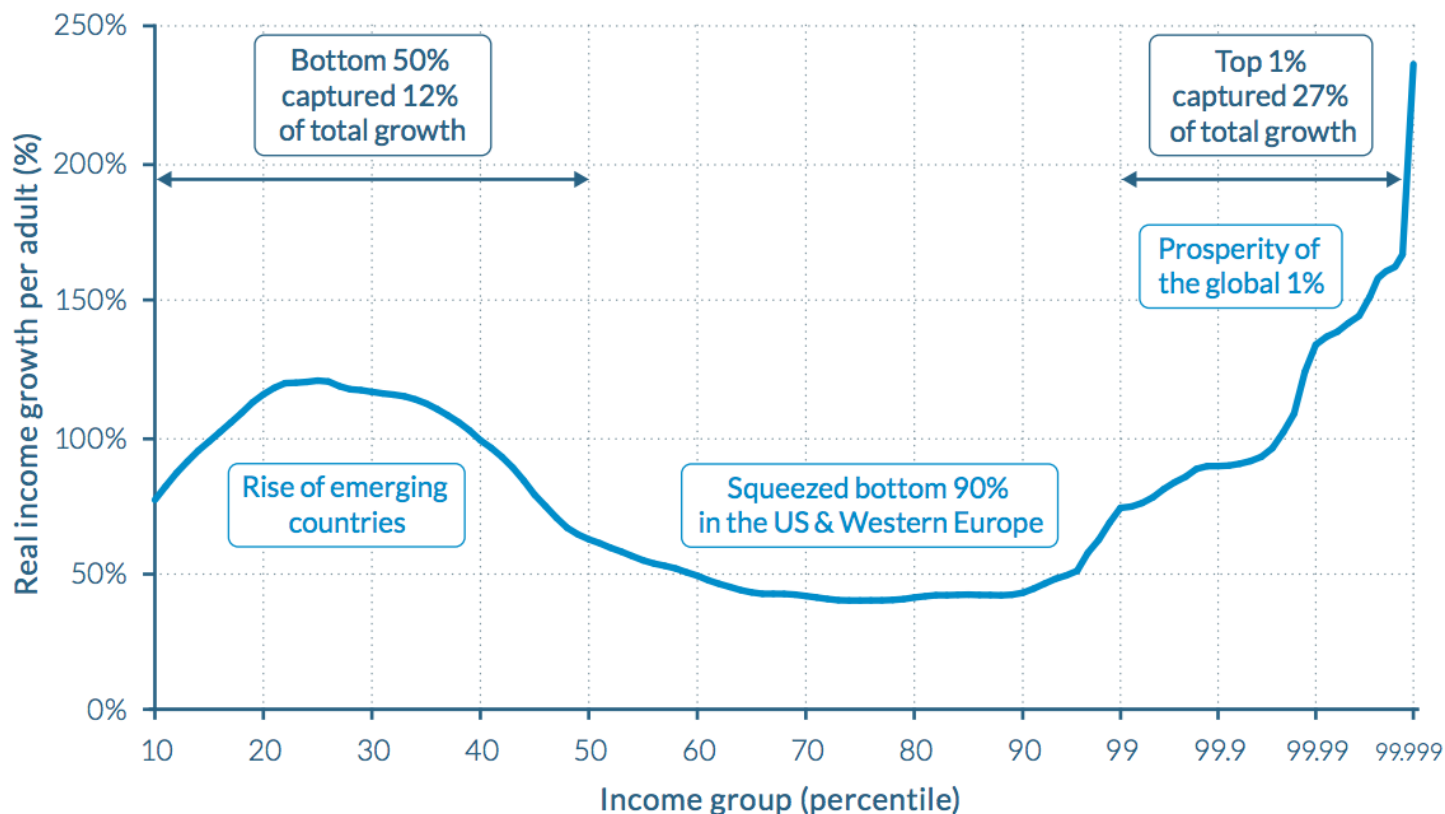
The squeezed global wealth middle class, 1980–2050



Source: WID.world (2017). See wir2018.wid.world for data series and notes.

In 2016, in a world represented by China, Europe and the US, the global wealth share of the Top 1% was 33%. Under "Business as usual", the Top 1% global wealth share would reach 39% by 2050, while the Top 0.1% wealth owners would own nearly as much wealth (26%) as the middle class (27%). The evolution of global wealth groups from 1987 to 2017 is represented by China, Europe and the US. Values are net of inflation.

The elephant curve of global inequality and growth, 1980–2016



Source: WID.world (2017). See wir2018.wid.world for more details.

On the horizontal axis, the world population is divided into a hundred groups of equal population size and sorted in ascending order from left to right, according to each group's income level. The Top 1% group is divided into ten groups, the richest of these groups is also divided into ten groups, and the very top group is again divided into ten groups of equal population size. The vertical axis shows the total income growth of an average individual in each group between 1980 and 2016. For percentile group p99p99.1 (the poorest 10% among the world's richest 1%), growth was 74% between 1980 and 2016. The Top 1% captured 27% of total growth over this period. Income estimates account for differences in the cost of living between countries. Values are net of inflation.

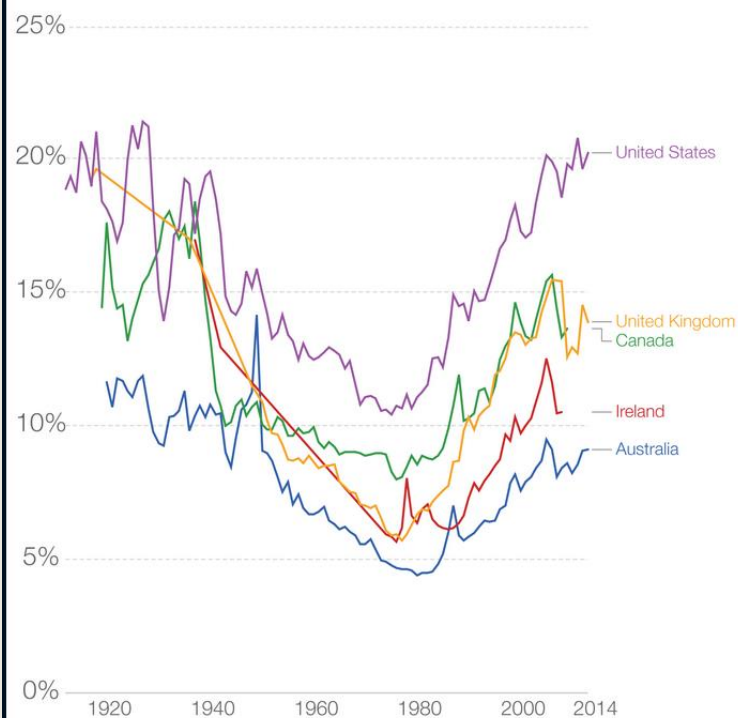


La desigualdad global ha crecido pero el comportamiento entre países es heterogéneo

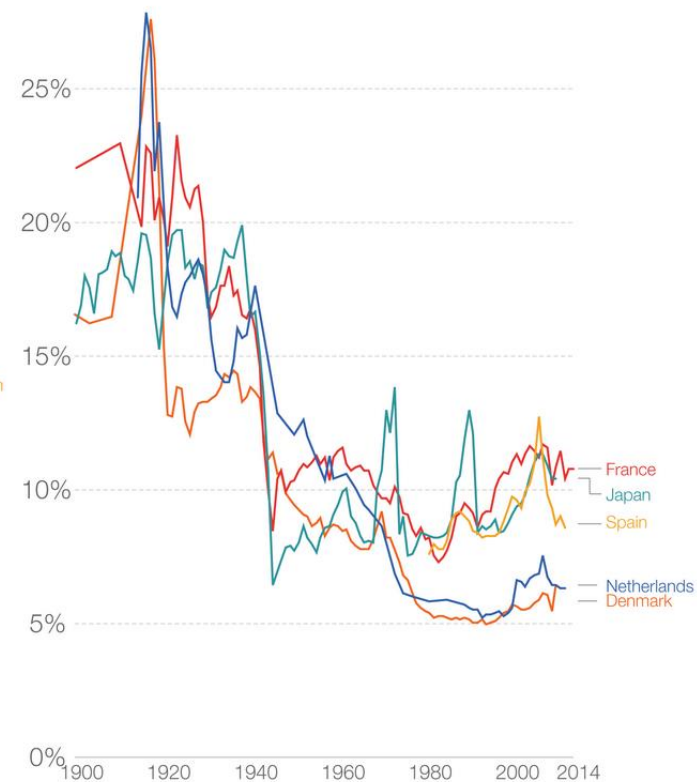
Our World in Data

Share of Total Income going to the Top 1% since 1900

The evolution of inequality in English speaking countries followed a U-shape



The evolution of inequality in continental Europe and Japan followed an L-shape

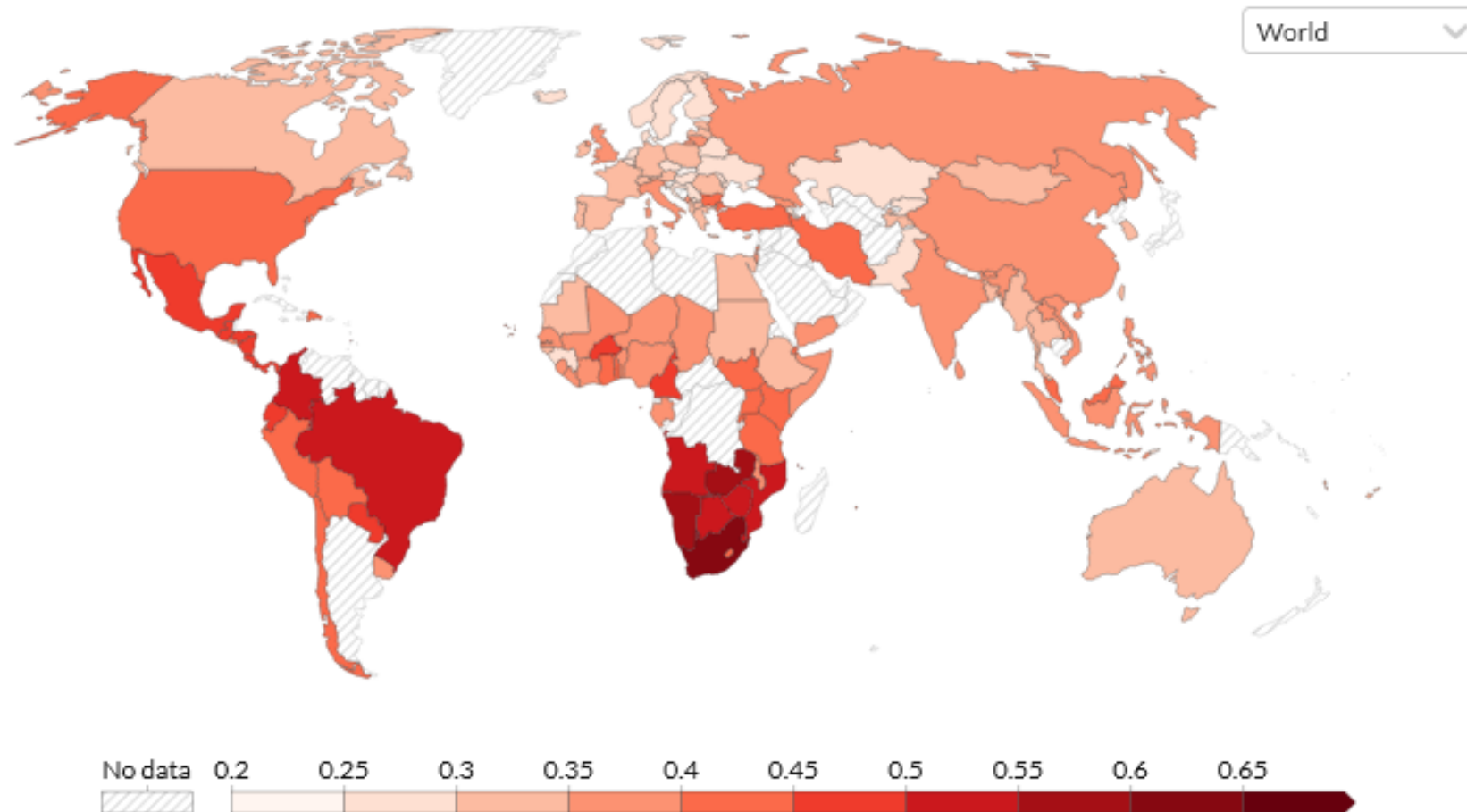


Data source: World Wealth and Income Database (2018). This is income before taxes and transfers. This data visualisation is available at OurWorldinData.org. There you find the raw data and more visualisations on inequality and how the world is changing. Licensed under CC-BY-SA by the author Max Roser.

Income inequality: Gini coefficient, 2019

Our World
in Data

The Gini coefficient is a measure of the inequality of the income distribution in a population. Higher values indicate a higher level of inequality.



Source: World Bank Poverty and Inequality Platform

Note: Depending on the country and year, the data relates to either disposable income or consumption per capita.

OurWorldInData.org/income-inequality/ • CC BY

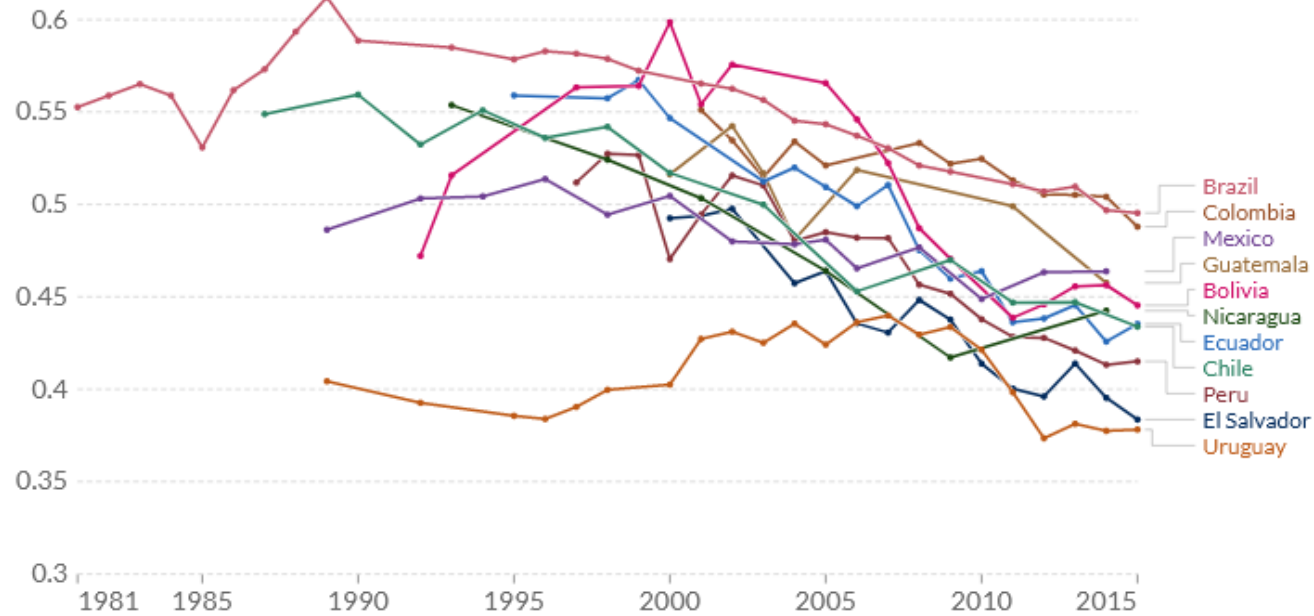
¿Qué ha pasado en AL?

Income inequality in Latin America, 1981 to 2015

The Gini index measures the distribution of household equivalized income, including zero income. A higher Gini index is indicative of a more unequal distribution of income.

Our World
in Data

+ Add country

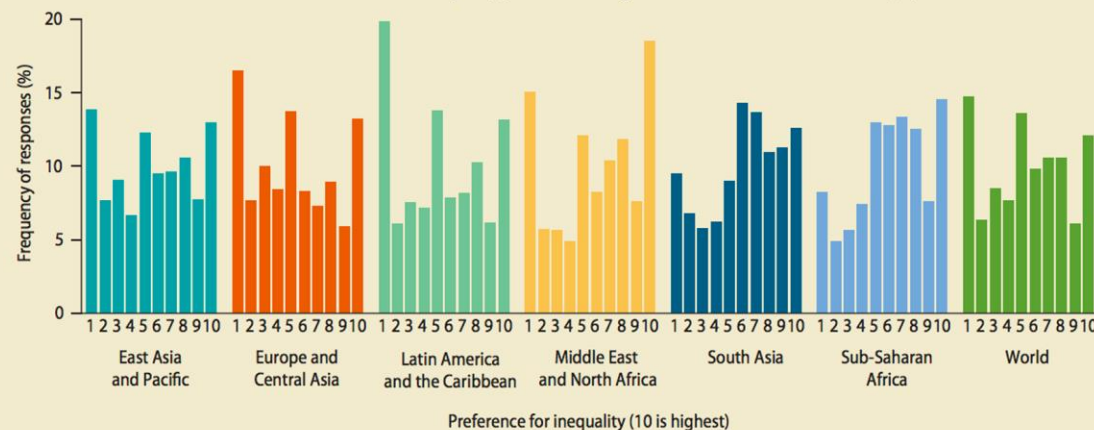


Source: Socio-Economic Database for Latin America and the Caribbean (CEDLAS and The World Bank)
OurWorldInData.org/income-inequality • CC BY

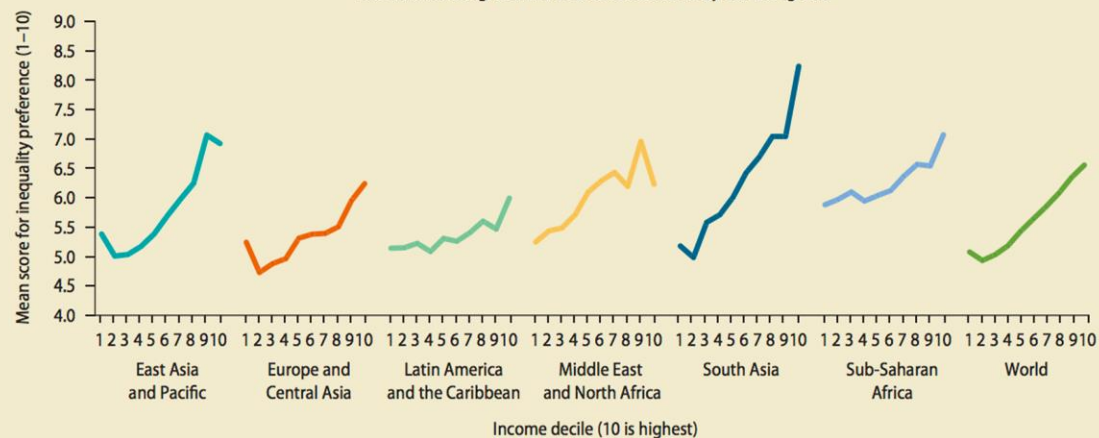


Views of income inequality vary across world regions and income deciles

a. Views on income inequality are polarized around the world: in each region, a disproportionate share of respondents either strongly agree with "income should be more equal" (1) or "we need larger income differences as incentives" (10).



b. The preference for inequality tends to rise by income decile, even though the difference between the lowest (1) and highest (10) deciles varies markedly across regions.



Source: World Bank calculations, based on World Value Survey.

Note: Calculations are based on data for the 2010-14 "wave." Preference for inequality ranges from agreement with (1), "Income should be more equal," to agreement with (10), "We need larger income differences as incentives." The survey question, "whether income should be made more equal or we need larger income differences as incentives for individual effort," was asked to surveyors from 60 countries.

La desigualdad en México

Cuadro 4

*Participación porcentual de los deciles de ingreso total per cápita:
México 1984 a 2014*

Deciles	1984	1989	1992	1994	1996	1998	2000	2002	2004	2006	2008	2010	2012
I	1.6	1.4	1.4	1.3	1.4	1.2	1.2	1.5	1.5	1.6	1.5	1.6	1.7
II	2.8	2.5	2.5	2.3	2.5	2.2	2.3	2.6	2.7	2.8	2.6	2.9	2.9
III	3.6	3.4	3.3	3.2	3.4	3.2	3.2	3.5	3.7	3.7	3.6	4.0	3.8
IV	4.5	4.3	4.3	4.1	4.3	4.3	4.2	4.6	4.6	4.7	4.6	4.9	4.8
V	5.8	5.4	5.3	5.2	5.4	5.4	5.4	5.6	5.7	5.7	5.7	6.0	5.8
VI	7.3	6.7	6.6	6.5	6.7	6.7	6.7	7.0	7.0	7.0	7.0	7.3	7.1
VII	9.4	8.4	8.3	8.3	8.4	8.5	8.5	8.7	8.6	8.6	8.7	9.0	8.7
VIII	12.1	10.8	11.0	10.9	11.0	11.0	10.9	11.2	11.0	11.0	11.2	11.5	11.1
IX	16.8	15.4	15.9	15.7	15.7	16.0	15.7	16.0	15.8	15.7	15.8	15.9	15.6
X	36.1	41.7	41.6	42.5	41.2	41.3	41.9	39.3	39.3	39.3	39.1	37.0	38.5

Fuente: ENIGH levantadas por el INEGI en 1984, 1989, 1992, 1994, 1996, 1998, 2000, 2002, 2006, 2008, 2010, 2012 y 2014.



Cuadro 7

Coeficientes de Gini y Palma. Distribución de la subdeclaración proporcional al cuadrado del ingreso. México 2008-2014.

Escenarios (%)		2008		2010		2012		2014	
Sub ^{a/}	Tru ^{a/}	Palma	Gini	Palma	Gini	Palma	Gini	Palma	Gini
100	0	9.9	0.698	8.9	0.674	9.1	0.675	11.7	0.723
95	5	10.1	0.701	9.1	0.679	9.3	0.681	11.9	0.728
90	10	10.3	0.704	9.3	0.684	9.6	0.686	12.1	0.732
85	15	10.4	0.706	9.5	0.689	9.8	0.692	12.4	0.737
80	20	10.5	0.709	9.7	0.694	10.1	0.698	12.6	0.741
75	25	10.6	0.712	9.9	0.699	10.3	0.703	12.9	0.746
70	30	10.7	0.714	10.1	0.703	10.6	0.709	13.1	0.75
65	35	10.8	0.717	10.3	0.708	10.8	0.715	13.4	0.755
60	40	11.0	0.720	10.5	0.713	11.1	0.721	13.7	0.760
55	45	11.1	0.722	10.7	0.718	11.4	0.726	14.0	0.764
50	50	11.2	0.725	11.0	0.723	11.7	0.732	14.3	0.769
45	55	11.3	0.728	11.2	0.728	12.0	0.738	14.6	0.774
40	60	11.5	0.731	11.5	0.733	12.4	0.744	14.9	0.778
35	65	11.6	0.733	11.7	0.738	12.7	0.75	15.2	0.783
30	70	11.7	0.736	12.0	0.743	13.0	0.756	15.6	0.788
25	75	11.9	0.739	12.3	0.748	13.4	0.762	15.9	0.793
20	80	12.0	0.742	12.5	0.753	13.8	0.768	16.3	0.797
15	85	12.2	0.745	12.8	0.759	14.2	0.774	16.7	0.802
10	90	12.3	0.748	13.2	0.764	14.7	0.78	17.1	0.807
5	95	12.5	0.751	13.5	0.769	15.1	0.786	17.6	0.812
0	100	12.7	0.754	13.9	0.775	15.6	0.793	18.1	0.818

a/ Sub= subdeclaración, Tru=truncamiento. Fuente: estimaciones propias con base en la ENIGH 2008-2014. Nueva construcción.

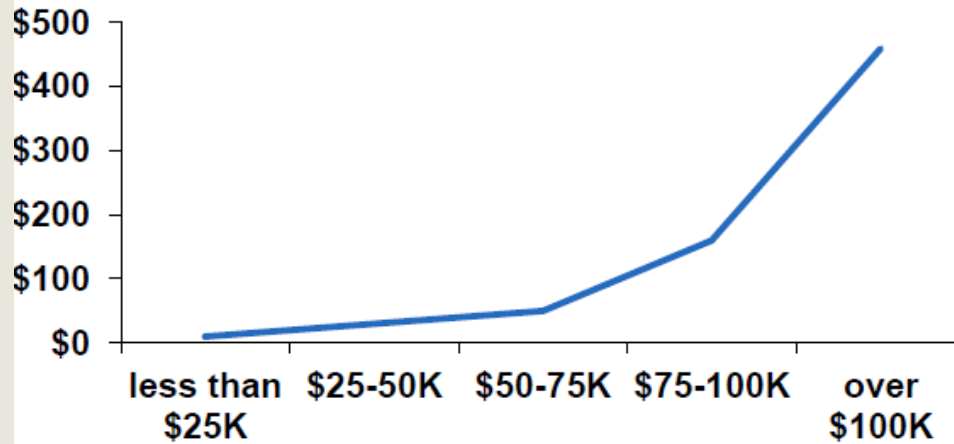




¿Deben preocuparnos las tendencias de la desigualdad del ingreso?

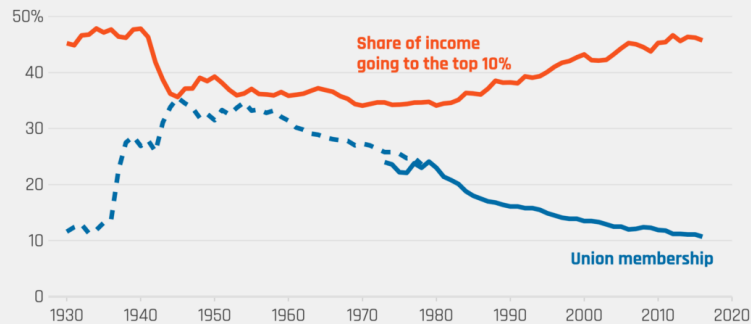


Average Political Donation



Historically, there has been an inverse relationship between union density and income inequality in the United States

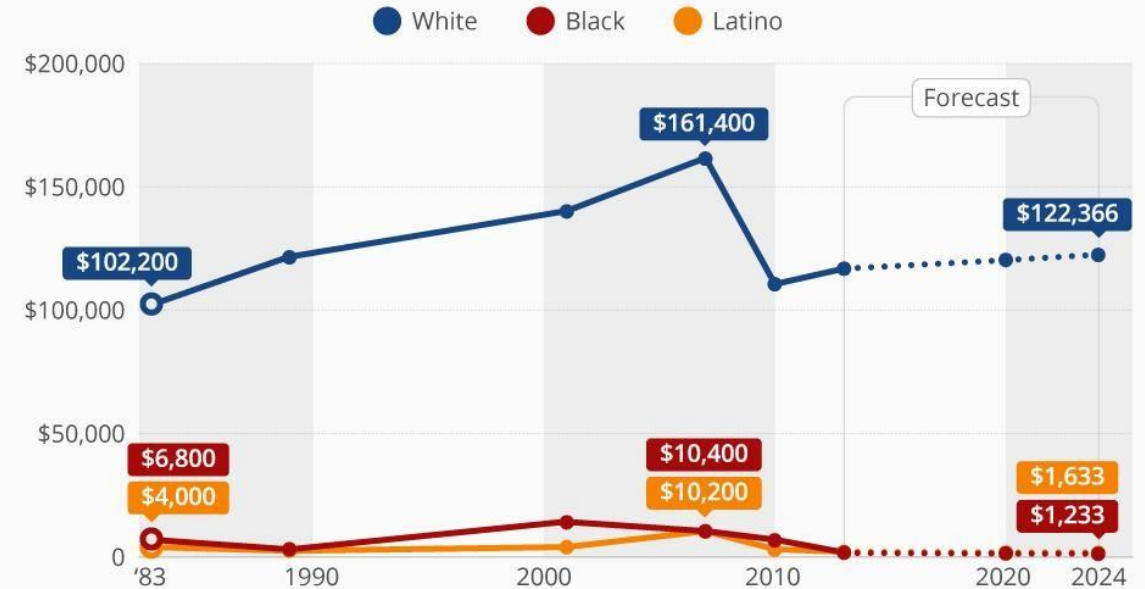
U.S. union density and share of national income going to the top 10 percent of earners, 1930–2016



Source: For union density series from 1930–1978, see U.S. Bureau of Labor Statistics, "Handbook of Labor Statistics: Bulletin of the United States Bureau of Labor Statistics, No. 2017" (1980); for union density series from 1973–2016, see Barry Hirsch and David Macpherson, "Union Membership and Coverage Database from the Current Population Survey: Note," Industrial and Labor Relations Review 56 (2) (2003) [updated annually at unionstats.com]; for share of income going to top 10 percent, see Gabriel Zucman, "Distributional National Accounts," appendix table II: distributional series.

Racial Wealth Inequality Is Rampant In The U.S.

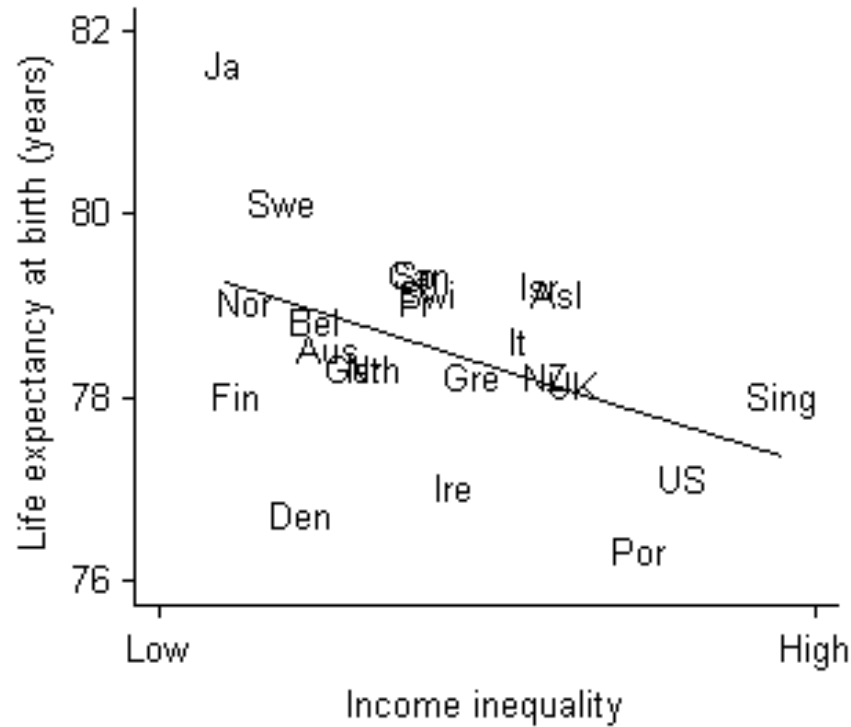
Median household wealth by race/ethnicity in the United States (1983–2024)



Source: Prosperity Now & Institute For Policy Studies

Desigualdad y problemas sociales

Life expectancy by income inequality, 23 countries (replication of Wilkinson and Pickett's figure 6.3)



Health and Social Problems are Worse in More Unequal Countries

Index of:

- Life expectancy
- Math & Literacy
- Infant mortality
- Homicides
- Imprisonment
- Teenage births
- Trust
- Obesity
- Mental illness – incl. drug & alcohol addiction
- Social mobility



Source: Wilkinson & Pickett, *The Spirit Level* (2009)

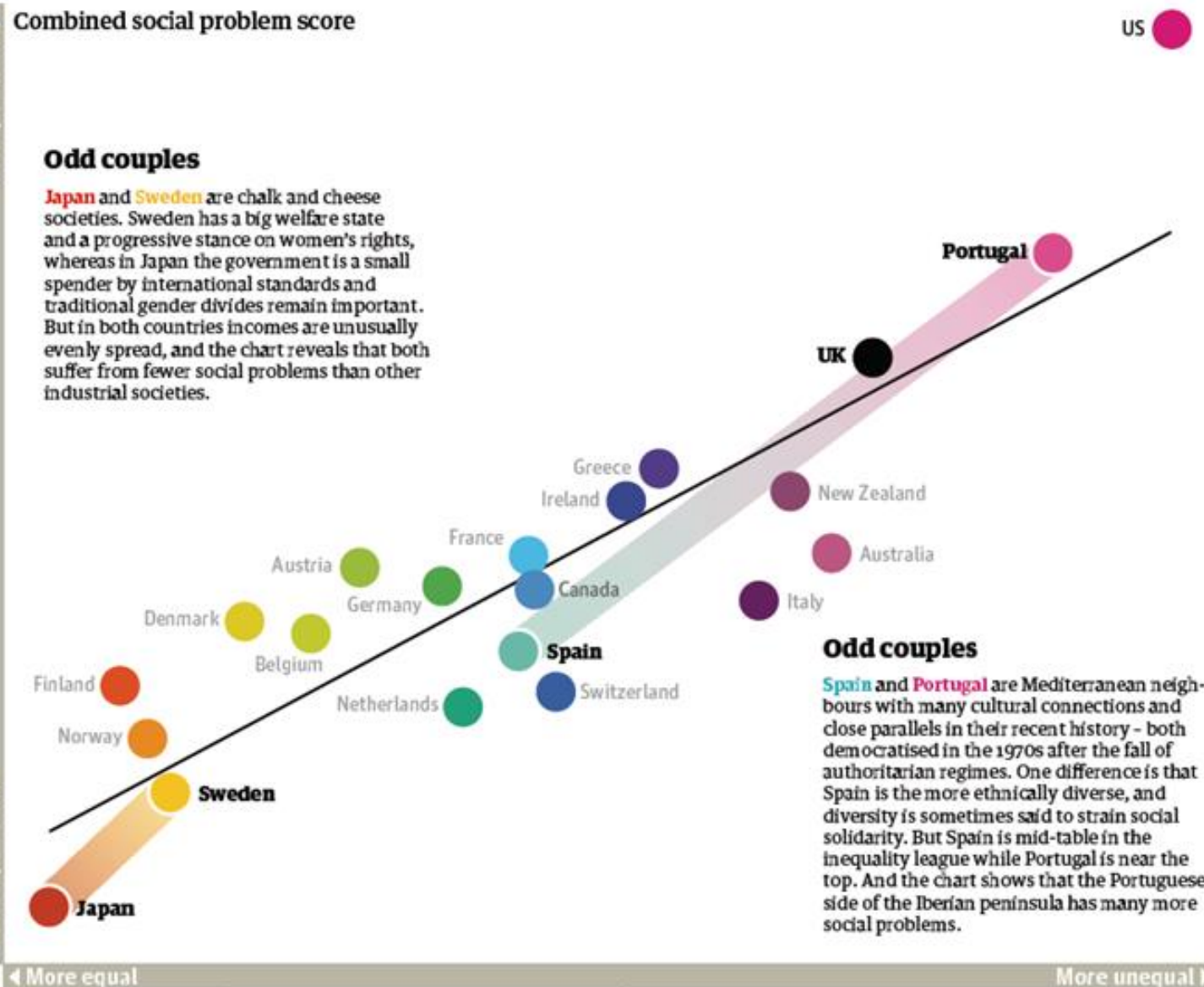
Combined social problem score

More problems

Odd couples

Japan and **Sweden** are chalk and cheese societies. Sweden has a big welfare state and a progressive stance on women's rights, whereas in Japan the government is a small spender by international standards and traditional gender divides remain important. But in both countries incomes are unusually evenly spread, and the chart reveals that both suffer from fewer social problems than other industrial societies.

Fewer problems

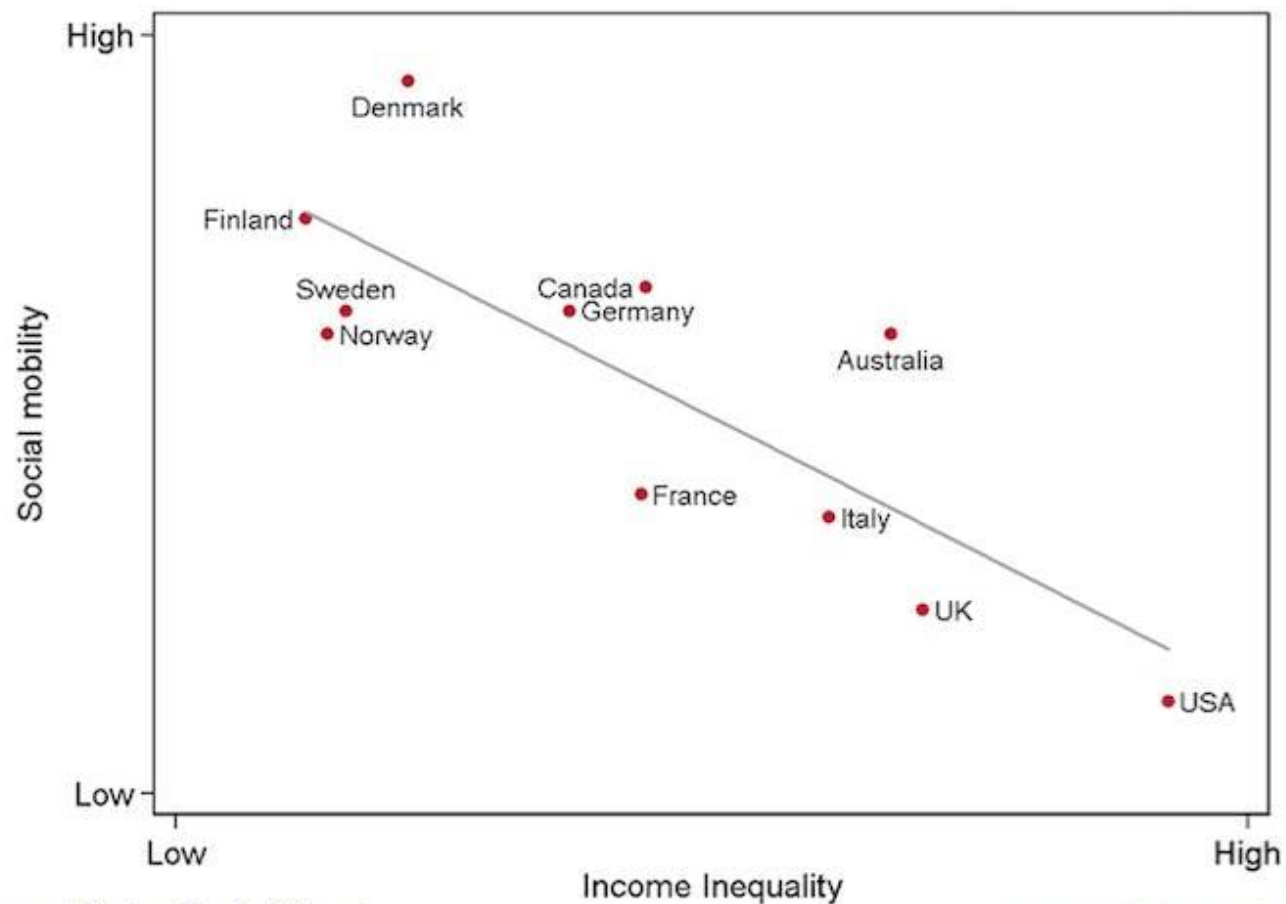


Odd couples

Spain and **Portugal** are Mediterranean neighbours with many cultural connections and close parallels in their recent history - both democratised in the 1970s after the fall of authoritarian regimes. One difference is that Spain is the more ethnically diverse, and diversity is sometimes said to strain social solidarity. But Spain is mid-table in the inequality league while Portugal is near the top. And the chart shows that the Portuguese side of the Iberian peninsula has many more social problems.


Desigualdad y movilidad social

Social mobility is lower in more unequal countries





¿Qué juicios podemos hacer respecto a la situación actual?

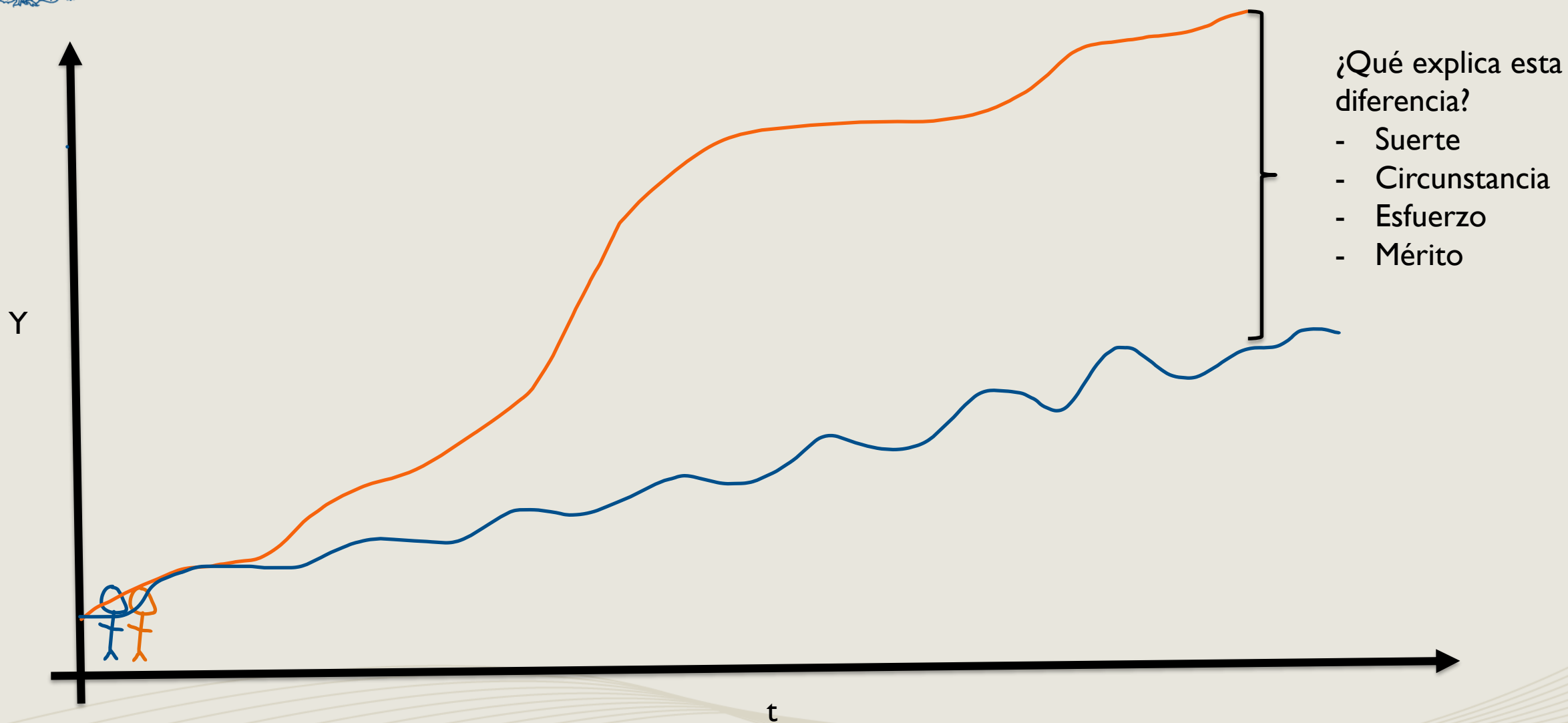


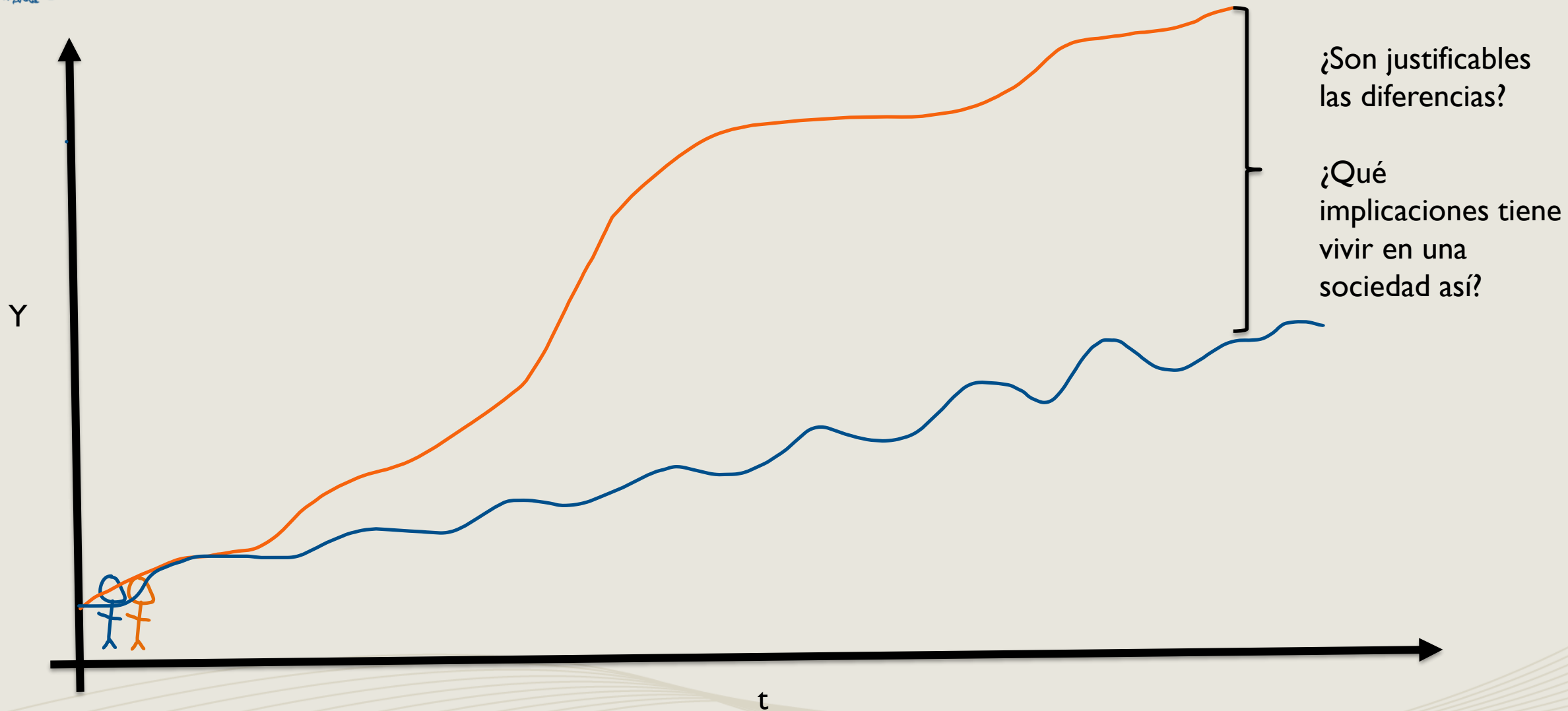


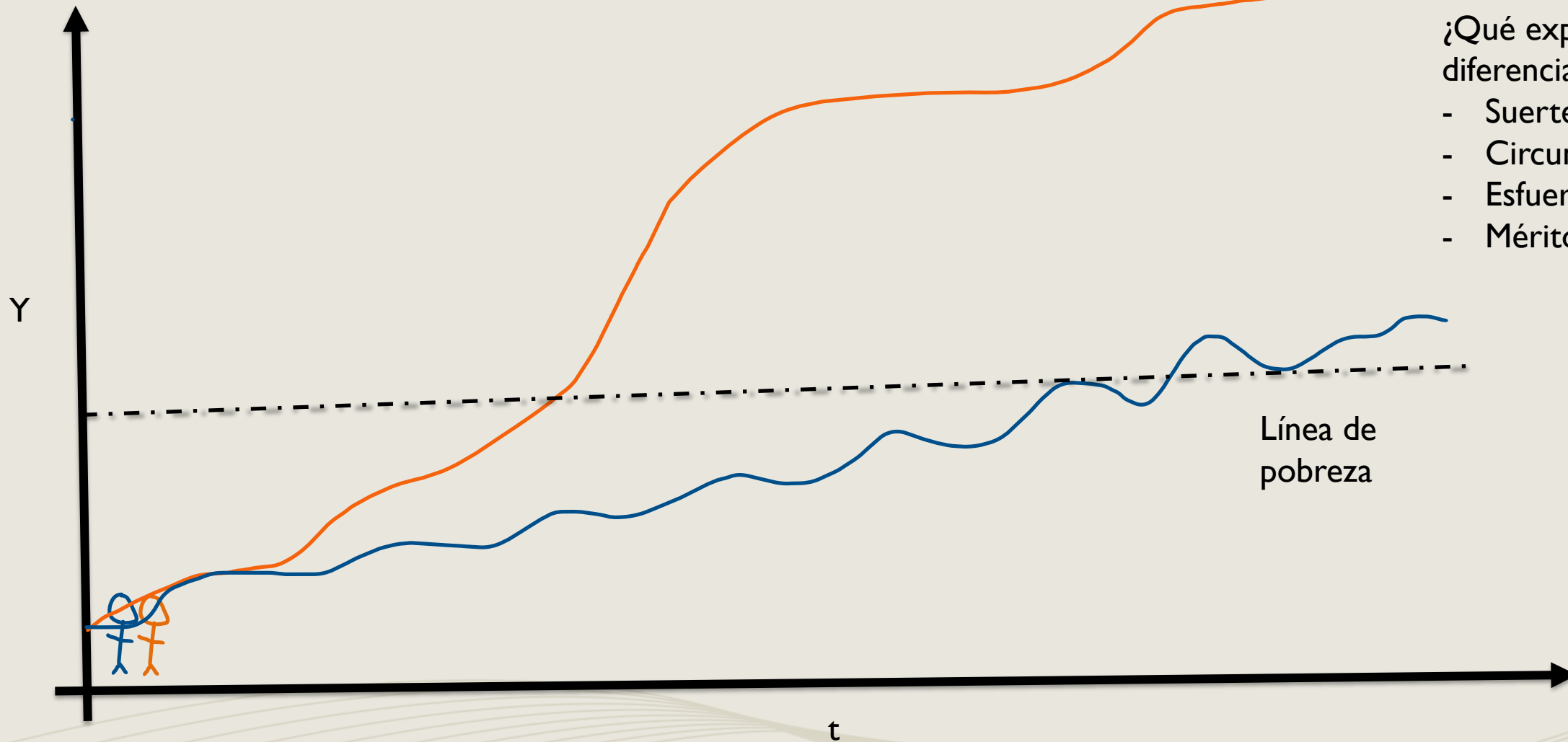
Este curso se hace distintas preguntas

Desigualdad y justicia social

- ¿Es mala o buena la desigualdad?
- ¿Qué consecuencias tiene la desigualdad?
- ¿Es justa o injusta la desigualdad? ¿Bajo qué criterio de justicia?
- ¿Cómo se transmiten las desigualdades?
- ¿Cuál es la relación entre pobreza y desigualdad?
- ¿Qué hay de la exclusión social?
- ¿Qué sabemos de estos temas y cómo hemos aprendido?

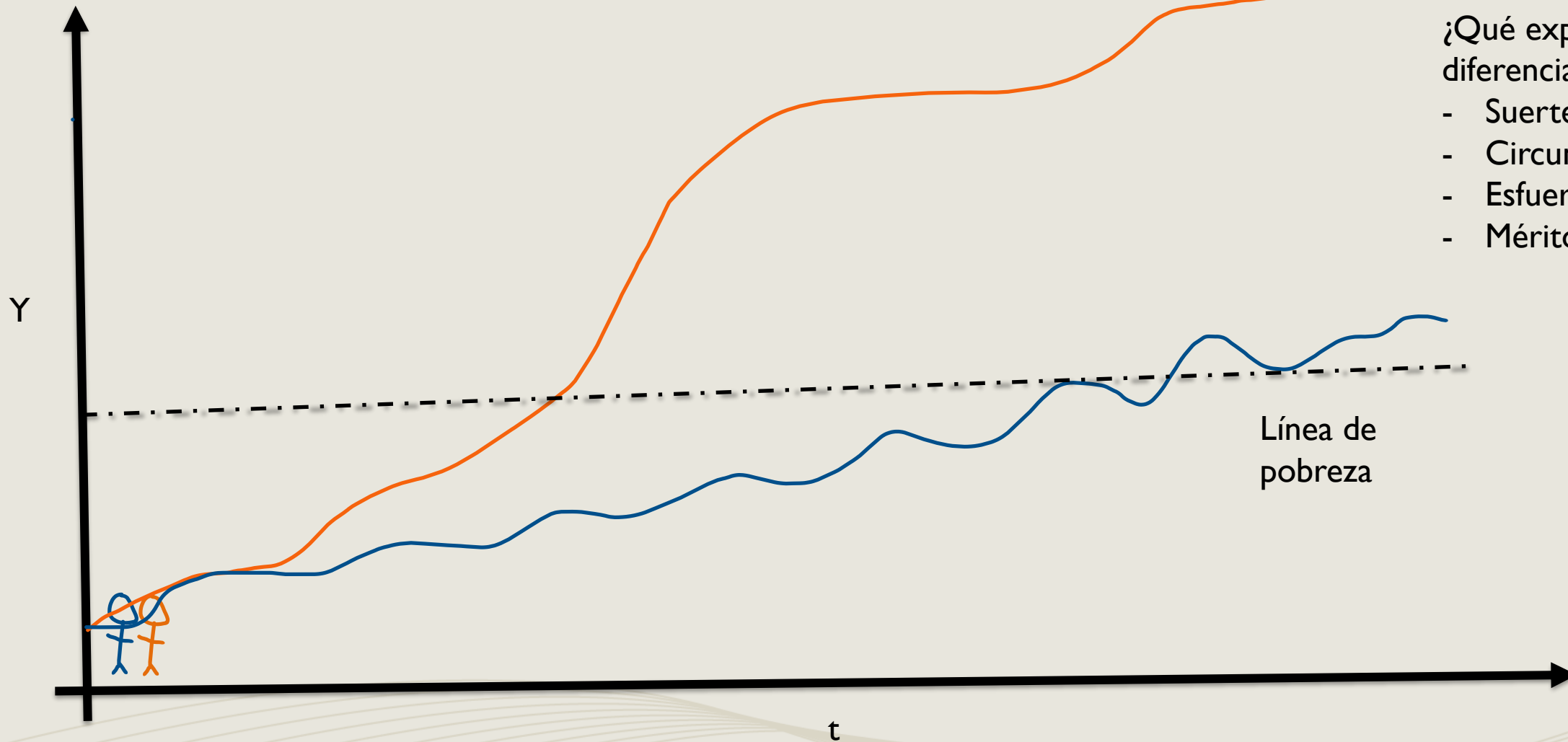






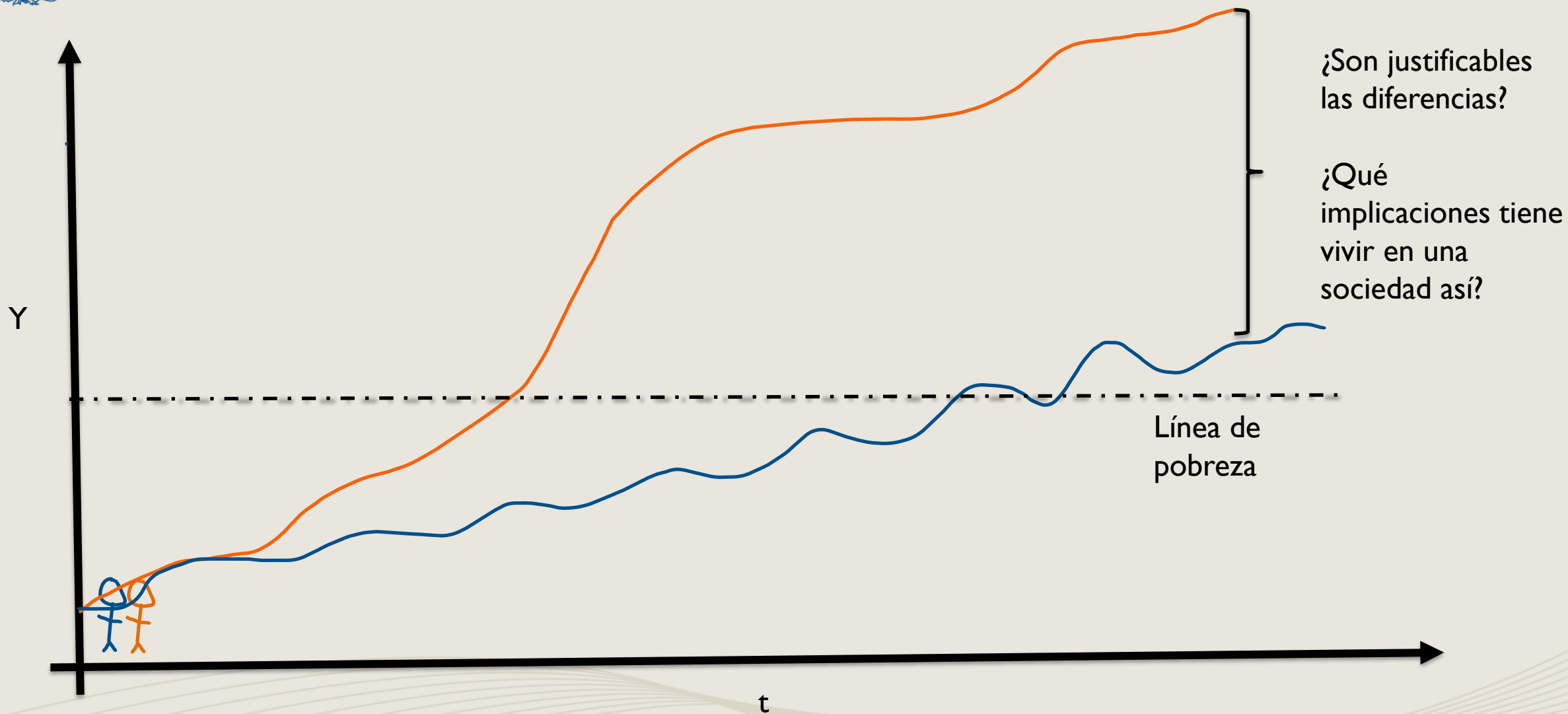
¿Qué explica esta diferencia?

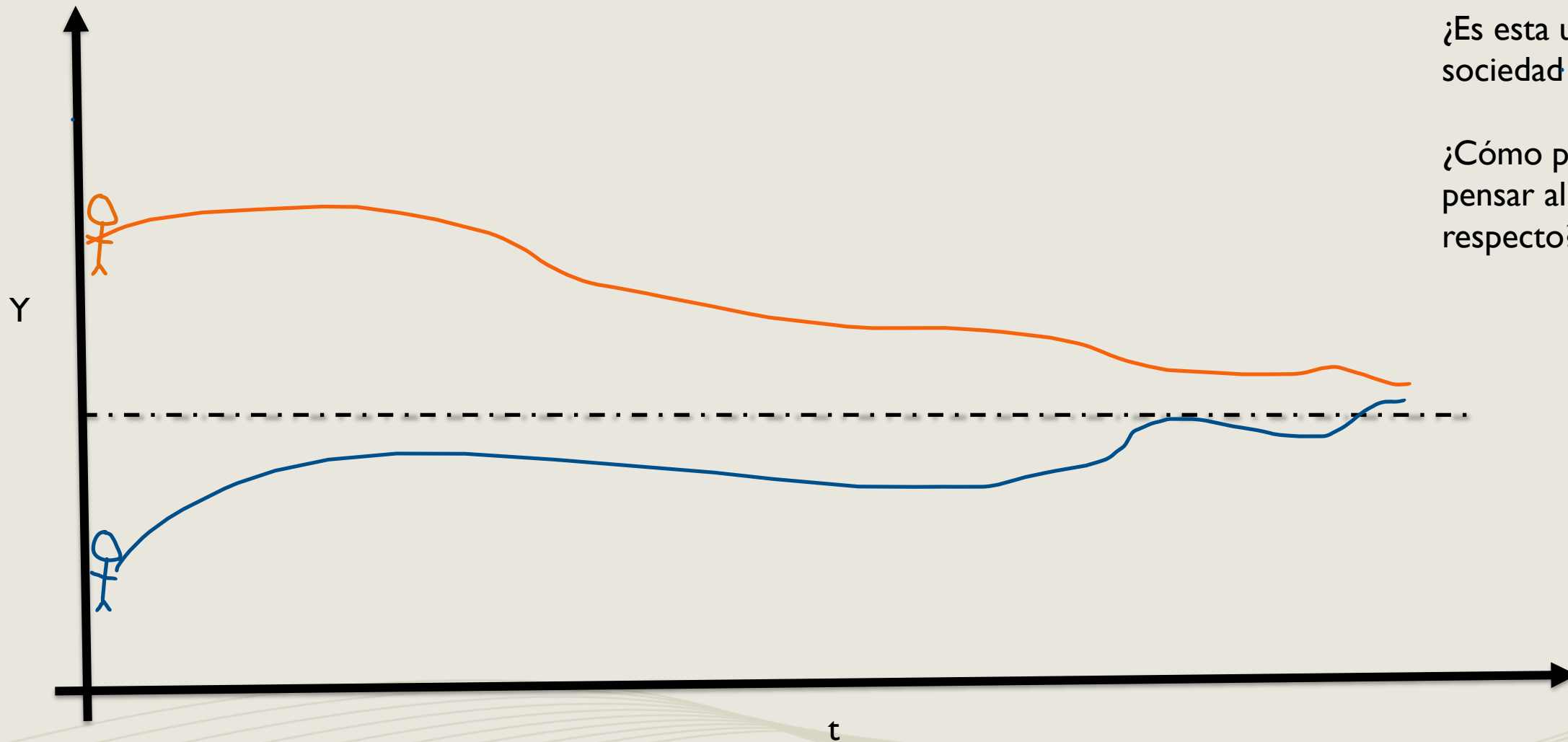
- Suerte
- Circunstancia
- Esfuerzo
- Mérito



¿Qué explica esta diferencia?

- Suerte
- Circunstancia
- Esfuerzo
- Mérito





¿Es esta una
sociedad justa?

¿Cómo podemos
pensar al
respecto?



Objetivos del curso

- El curso presenta y discute las teorías en las que descansan conceptos centrales para el análisis del desarrollo social:
 - *Justicia,*
 - *(des)igualdad económica y social,*
 - *pobreza y*
 - *exclusión social.*
- Esta revisión se acompaña de un repaso de los aspectos metodológicos que deben considerarse para el estudio empírico de estos conceptos.
- Además el curso acerca a los estudiantes a la evidencia respecto al estado de la desigualdad, pobreza y exclusión social en México y a nivel internacional.



1. Identificar las corrientes teóricas y conceptos relevantes para el análisis de la desigualdad social
2. Evaluar críticamente las fortalezas y debilidades de la evidencia empírica en torno a la desigualdad social
3. Establecer los fundamentos teórico y metodológicos para estudiar los fenómenos de interés del curso
4. Conocer el tipo de trabajo empírico que se realiza en México y a nivel internacional
5. Fortalecer la capacidad analítica de los estudiantes respecto al estudio de la pobreza, desigualdad social y exclusión.



Estrategia de aprendizaje

- Los docentes son los responsables principales de exponer los temas, prepararán una presentación y la subirán en un repositorio para que el grupo pueda descargarla.
- El grupo deberá leer antes de cada sesión por lo menos una lectura.
- *En algunas ocasiones el grupo será responsable de presentar alguno de los temas del curso.*
- *Exposición:* Cada tres o cuatro clases un grupo de estudiantes hará una presentación de un par de artículos con evidencia empírica sobre desigualdad, pobreza y exclusión social. Después se abrirá la discusión en grupo.

Evaluación



40% asistencia.

30% participación y exposición

30% ejercicio.



Contenidos del curso

- El curso tiene cuatro bloques principales correspondientes a los siguiente temas:
 - *Justicia,*
 - *(des)igualdad económica y social,*
 - *pobreza y*
 - *exclusión social.*
- Cada tema tiene cuatro bloques principales:
 - Teoría y conceptos
 - Medición
 - Estudios empíricos en México
 - Estudios empíricos internacionales



Próxima clase

- Capítulo 1: Callinicos, A. 2003. *Igualdad*. Temas Para El Siglo XXI. Siglo XXI de España Editores, S.A. <https://books.google.com.mx/books?id=RSykiRa7Ju8C>.
- Capítulo 1: [In it together: Why less inequality benefits all](https://read.oecd-ilibrary.org/employment/in-it-together-why-less-inequality-benefits-all_9789264235120-en#page7) https://read.oecd-ilibrary.org/employment/in-it-together-why-less-inequality-benefits-all_9789264235120-en#page7