



**Programa
Universitario
de Estudios
del Desarrollo**
UNAM

Desigualdad social: Retos y avances en el estudio empírico

Curtis Huffman
Héctor Nájera

- Teorías de estratificación: La educación se coloca y cristaliza como un activo
- Criterio de justicia social: Nuestra sociedad es injusta si el logro educativo está mayormente determinado por el **origen social**
- **Origen social:** (Des)ventaja relativa a los sistemas económicos, sociales, políticos y culturales.





Decomposing 'Social Origins': The Effects of Parents' Class, Status, and Education on the Educational Attainment of Their Children

Erzsébet Bukodi^{1,2,*} and John H. Goldthorpe²

Analysing Social Inequality: A Critique of Two Recent Contributions from Economics and Epidemiology

John H. Goldthorpe

Two recent studies focusing on issues of social inequality are reviewed, one the work largely of economists, the other of epidemiologists. In both cases, the conceptualization and in turn the analysis of social inequality appear inadequate. In the case of the economists, concerned with whether, under New Labour, Britain has become a more equal society, attention is concentrated on changes in income distributions to the neglect of the distinction between the attributional and the relational aspects of inequality. The analyses presented reveal serious gaps and a lack of integration that could have been avoided through their grounding in some concept of class stratification. In the case of the epidemiologists, concerned to show a contextual effect of social inequality on population health and other outcomes, stratification is treated as one-dimensional, with no distinction being recognized between class and status. It is in fact status rather than the material inequalities associated with class that are seen as crucial in mediating the supposed contextual effect. But the inferences that are made from the available data on income distributions to inequalities of status and their consequences are often of a doubtful kind.

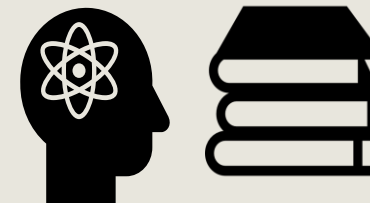
¿De dónde venimos?

- Goldthorpe 2010: *“Desigualdad que es estructurada de cierta manera o, esto es, desigualdad que no deviene de la fortuna individual sino de las formas inherentes y prevalecientes de relaciones sociales asentadas en cierta base institucional”* (p. 733)
- Por definición la desigualdad social es injusta
- Estas diferencias se leen en clave de *estratificadores: Mediadores de resultados desiguales*

Estratificación social

- **Características visibles e invisibles: “Estratificadores”**

- Color de ojos
- Color de cabello
- Color de piel
- Edad
- Condición étnica
- Lugar de nacimiento
- Género
- **Origen social**
- **Clase social**
- **Estatus**



Objetos
científicos



Decomposing ‘Social Origins’: The Effects of Parents’ Class, Status, and Education on the Educational Attainment of Their Children

Erzsébet Bukodi^{1,2,*} and John H. Goldthorpe²





Conceptos,
Medición,
métodos
estadísticos,
datos,
tamaño de
muestra,
Valores o casos
perdidos

Los resultados de la
investigación en términos de
su aportación al conocimiento

¿Descubrimos algo o no?

Modelo analítico y modelo de
medición



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Decomposing 'Social Origins': The Effects of Parents' Class, Status, and Education on the Educational Attainment of Their Children

Erzsébet Bukodi^{1,2,*} and John H. Goldthorpe²





- ¿Hay algún efecto del **origen social** (estatus, clase y educación) sobre el **logro educativo**?
- ¿Varía este efecto para diferentes generaciones?
- ¿Son diferentes los efectos de tres aspectos del origen social: Clase social parental, estatus parental y educación parental?

Implicaciones

- Si efectivamente el origen social (**estatus**) predice tus resultados educativos futuros: ¿Te gustaría vivir en dicha sociedad?
 - Velo de ignorancia (Rawls): ¿Qué reglas definirían una determinación justa de los logros (educativos)?



Implicaciones

- Si efectivamente el origen social (**estatus**) predice tus resultados educativos futuros: ¿Te gustaría vivir en dicha sociedad?
 - Velo de ignorancia (Rawls): ¿Qué reglas definirían una determinación justa de los logros (educativos)?
- Si efectivamente haber nacido en los 1990s, respecto a los 1950s, implica mejores perspectivas educativas: ¿En qué década te hubiera gustado nacer?
 - ¿"Vale" lo mismo la educación terciaria HOY que hace 40 años?
- Si efectivamente el estatus tiene un mayor efecto que la educación de los papás ¿Qué significa en términos de política social?
 - ¿Puedes intervenir en el estatus?





¿Son relevantes estas preguntas para México?

- ¿Hay algún efecto del **origen social** (estatus, clase y educación) sobre el **logro educativo**?
- ¿Varía este efecto para diferentes generaciones?
- ¿Son diferentes los efectos de tres aspectos del origen social: Clase social parental, estatus parental y educación parental?



Pensemos: Hipótesis para México

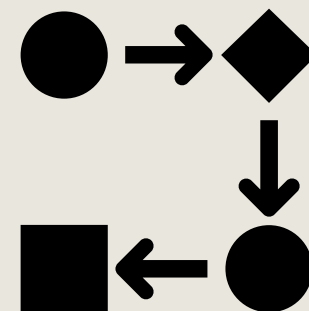
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- ¿Varía este efecto para diferentes generaciones?
- ¿Son diferentes los efectos de tres aspectos del origen social: Clase social parental, estatus parental y educación parental?

Problema del trabajo empírico

“Divergent findings on trends in inequalities in educational attainment associated with individuals’ social origins have led to much discussion of how far these reflect real differences by place and time or, rather, differences in research procedures”

- ¿Por qué?

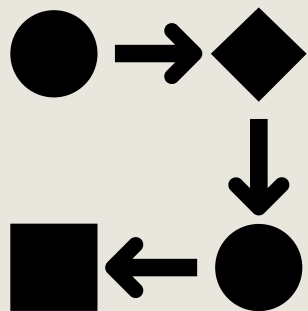
“i.e. that of the conceptualization and measurement of social origins”



Modelo de
medición



¿Cuál es la implicación?



Modelo de
medición



¿Es justa o
injusta
socialmente
una sociedad?



Ausencia del modelo teórico

Bukodi y Goldthorpe: *“But little explicit discussion has taken place of the theoretical grounds for treating social origins in one way rather than another.” p 1025*

Bukodi y Goldthorpe: *“It is difficult to avoid the conclusion that some notion of the ‘interchangeability of indicators’ (Lazarsfeld, 1939) has prevailed: or, in other words, that it has been assumed, if only implicitly, that however social origins are measured, it will make rather little difference in determining the extent of, or changes”*

¿Es el estatus conceptualmente distinto de la clase social?

¿Es la clase social conceptualmente distinta del logro educativo?

¿Qué es el logro educativo? ¿Años, niveles, múltiples grados?

Bukodi y Goldthorpe: Son conceptual distintos y estadísticamente distinguibles.



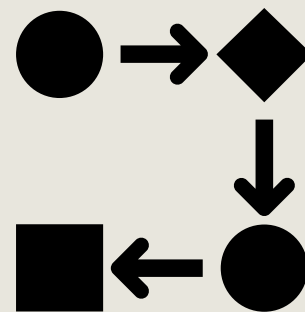
Ausencia del modelo teórico

Origen social:

- Ranking del prestigio ocupacional
- Status socio-económico
- Nivel educativo del padre
- Clase social

¿Son alternativas del mismo concepto?

¿Da lo mismo cuál utilicemos?



Modelo de
medición





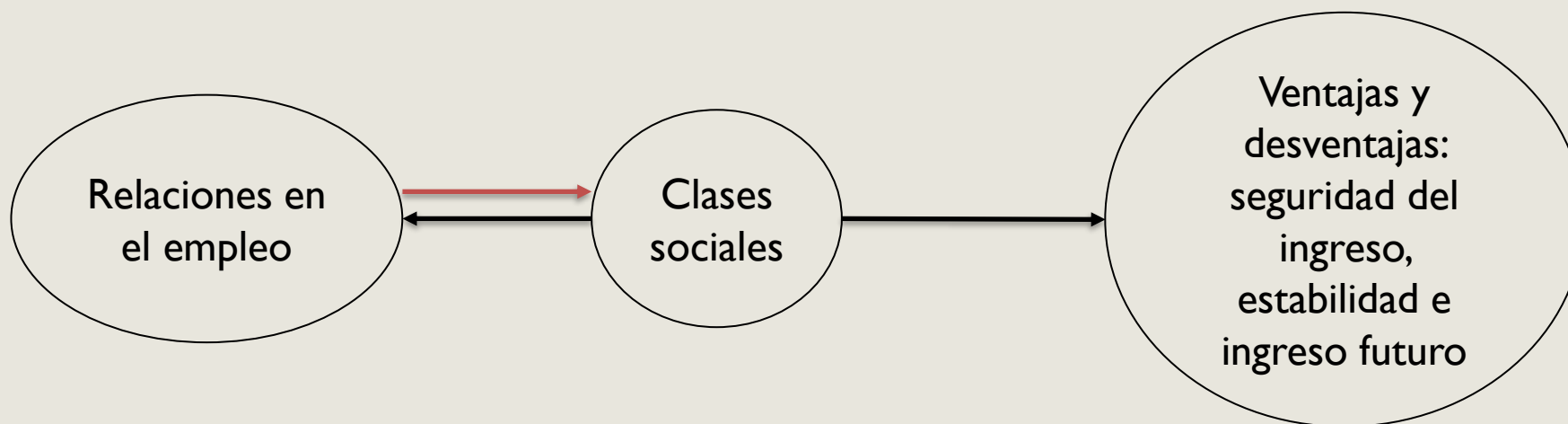
Clase social: Del modelo teórico al modelo de medición

- “Rather, they are explicitly designed to make operational a conceptualization of class in terms of social relations in labour markets and production units: or, that is, to determine class positions in terms of differences in **employment relations**. In this respect, both their criterion and construct validity have been extensively, and in general successfully, tested (see Goldthorpe, 2007, vol. 2, ch. 5; McGovern et al., 2008; Rose and Harrison, eds., 2009). Furthermore, class, thus understood, can be shown to be associated with economic advantage and disadvantage not only as regards individuals’ income levels but, further, as regards their income security, their short-term income stability and their longer-term income prospects (Goldthorpe and McKnight, 2006; Chan and Goldthorpe, 2007b).”



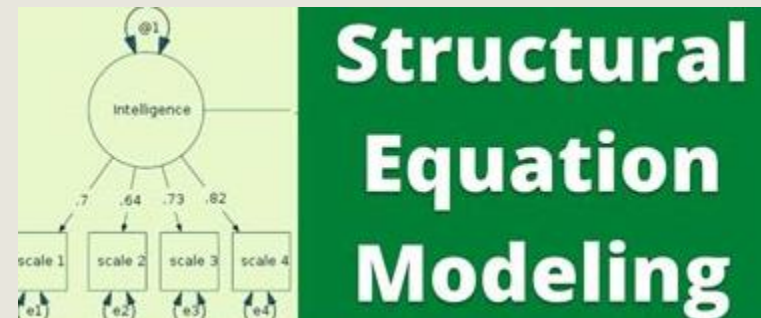
Clase social: Modelo de medición

Distal outcome (Resultado distante)



Las diferentes relaciones en el mercado de trabajo y en las unidades de producción son reflejo de la posición en la clase

Modelo de medición



Relaciones
en el
empleo

Clases
sociales

Ventajas y
desventajas:
seguridad del
ingreso,
estabilidad e
ingreso futuro

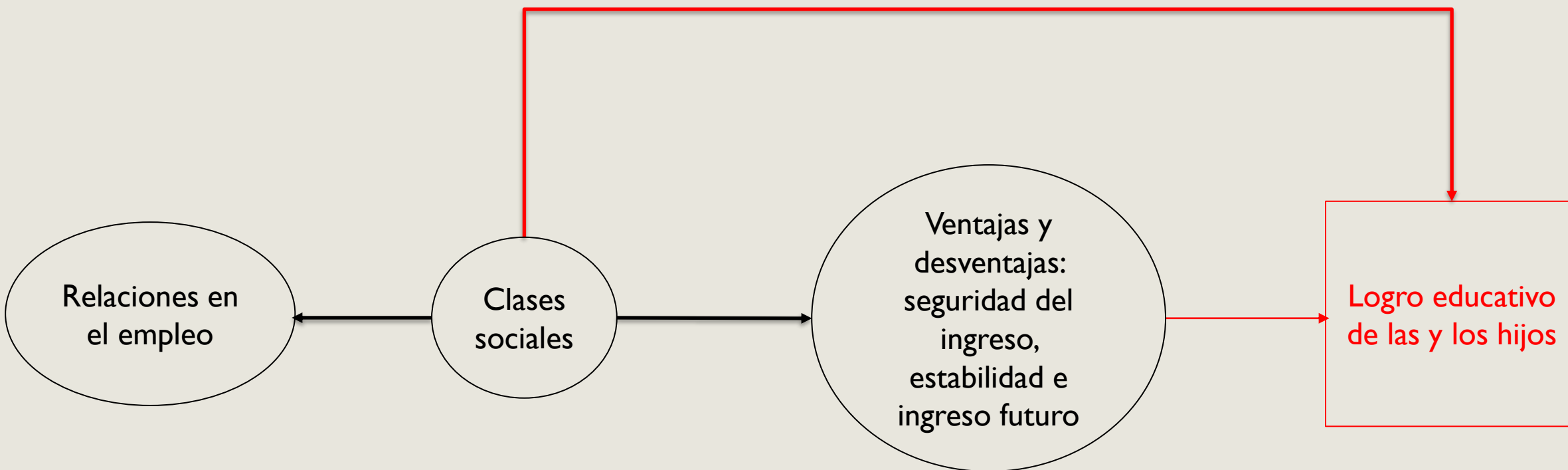
Análisis de clases latentes

MIMIC Model

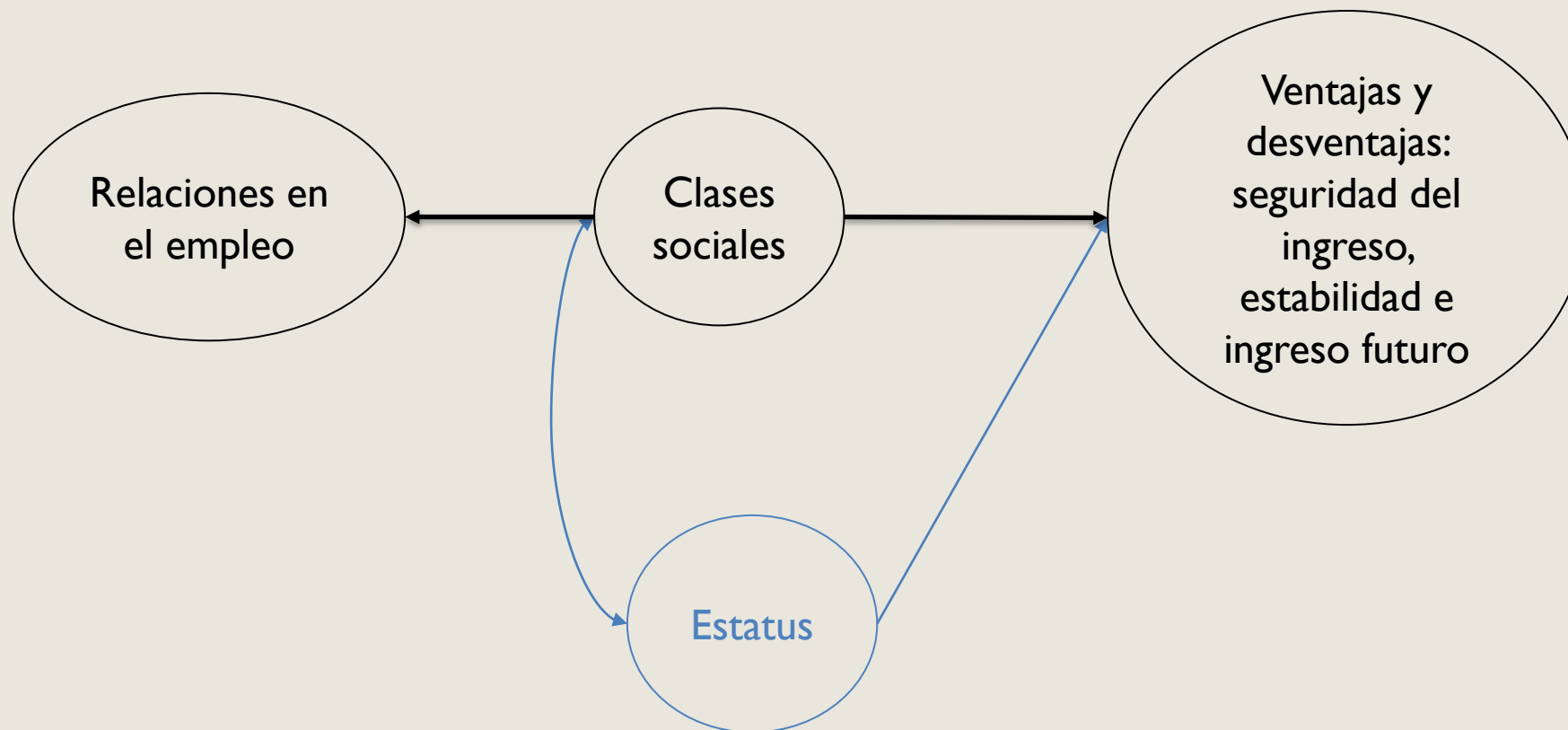
Indicadores múltiples
causas múltiples
(MIMIC)

Los métodos estadísticos
no son el modelo
estadístico ni el de
medición

Modelo medición \neq Modelo de analítico



¿Clase social = Origen social?



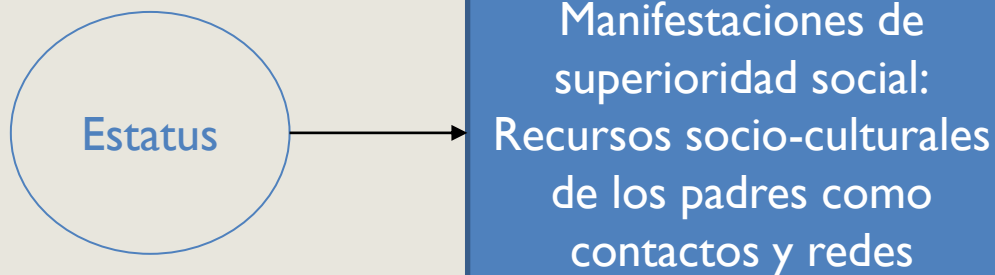
“while we would agree that if class serves as the only indicator of social origins, it is likely to ‘pick up’ the effects of different, but associated, factors also influencing individuals’ educational attainment, we would not see as the solution to this problem the ad hoc ‘decomposition’ of class. We would rather complement the concept of class”

Modelo de medición

Los amigos de primer orden (el primer amigo)

Table 1 Occupational categories used in the analysis and their constituent minor occupational groups

Code	Descriptive title	OPCS MOGs	%
GMA	General managers and administrators	10, 13, 15	2.5
PDM	Plant, depot and site managers	11, 14, 16	2.7
SM	Specialist managers	12	2.7
MPS	Managers and proprietors in services	17	4.4
OMO	Managers and officials, not elsewhere classified	19	2.0
SET	Scientists, engineers and technologists	20, 21	1.9
HP	Higher professionals	22, 24, 25, 26, 27, 29	3.3
TPE	Teachers and other professionals in education	23	4.5
API	Associate professionals in industry	30, 31, 32, 33, 39	3.9
APH	Associate professionals in health and welfare	34, 37	4.8
APB	Associate professionals in business	35, 36, 38	2.6
AOA	Administrative officers and assistants	40	2.1
NCC	Numerical clerks and cashiers	41	3.7
FRC	Filing and record clerks	42	1.9
OCW	Other clerical workers	43	3.5
SDC	Store and dispatch clerks	44, 49	2.1
SEC	Secretaries and receptionists	45, 46	3.3
SMC	Skilled and related manual workers in construction and maintenance	50, 52	3.5
SMM	Skilled and related manual workers in metal trade	51, 53, 54	3.5
SMO	Skilled and related manual workers not elsewhere classified	55, 56, 57, 58, 59	3.9
PSP	Protective service personnel	60, 61	1.9
CW	Catering workers	62	2.3
PSW	Personal service workers	63, 66, 67, 69	2.2
HW	Health workers	64	2.6
CCW	Childcare workers	65	2.6
BSR	Buyers and sales representatives	70, 71	1.6
SW	Sales workers	72, 73, 79	6.3
PMO	Plant and machine operatives	80, 81, 82, 83, 84, 85, 86, 89	6.2
TO	Transport operatives	87, 88	3.3
GL	General labourers	90, 91, 92, 93, 99	2.2
RWS	Routine workers in services	94, 95	6.1



Chan y Goldthorpe (2004) Is there a status order in contemporary British society? Evidence from the occupational structure friendship. *European Sociological Review*, 20, 383-401



Modelo de medición

Supuestos:

1. En las sociedades modernas la ocupación es una de las características que mayor correlaciona con el estatus
2. La asociación entre el estatus de dos personas es una buena medida de la igualdad social entre dos personas
3. A medida que el estatus aumenta, las ocupaciones del círculo más cercano tienden a ser las mayormente valoradas socialmente

Supuesto estadístico (CAMSIS):

Las 31 ocupaciones deberían correlacionar en un espacio de dos dimensiones.

La matriz de 31×31 debería mostrar algún tipo de correlación.

Resultados

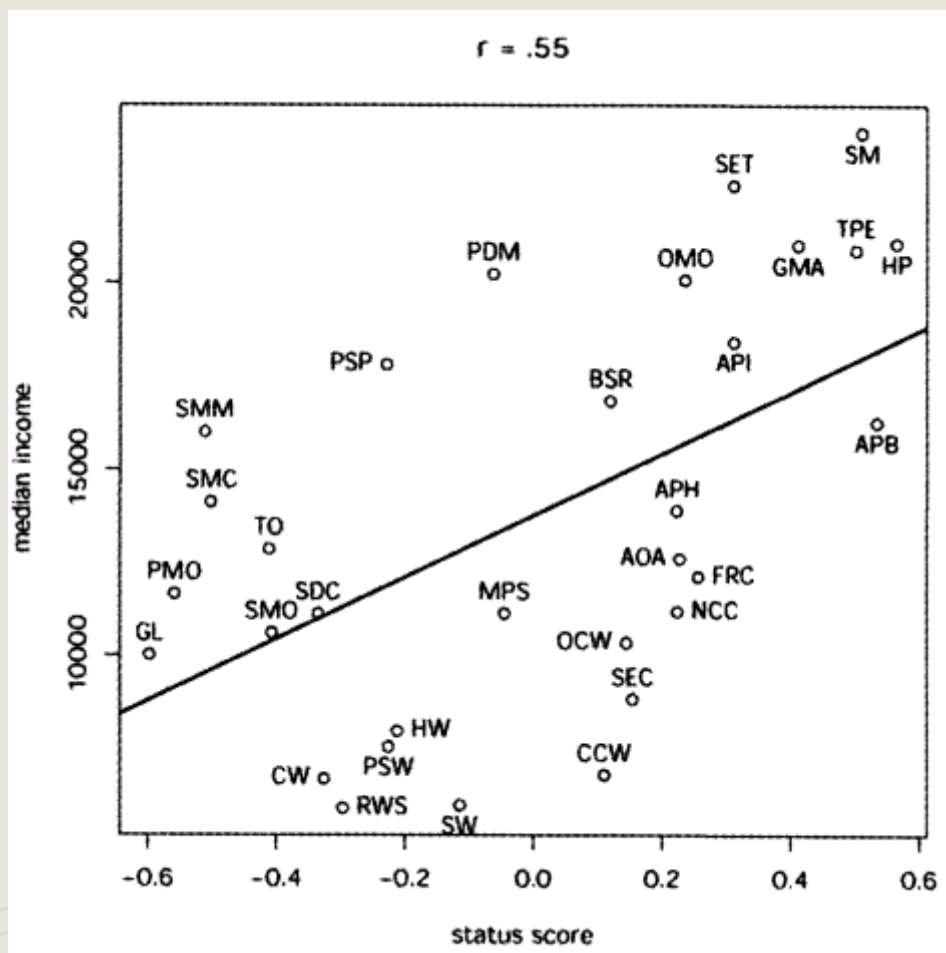
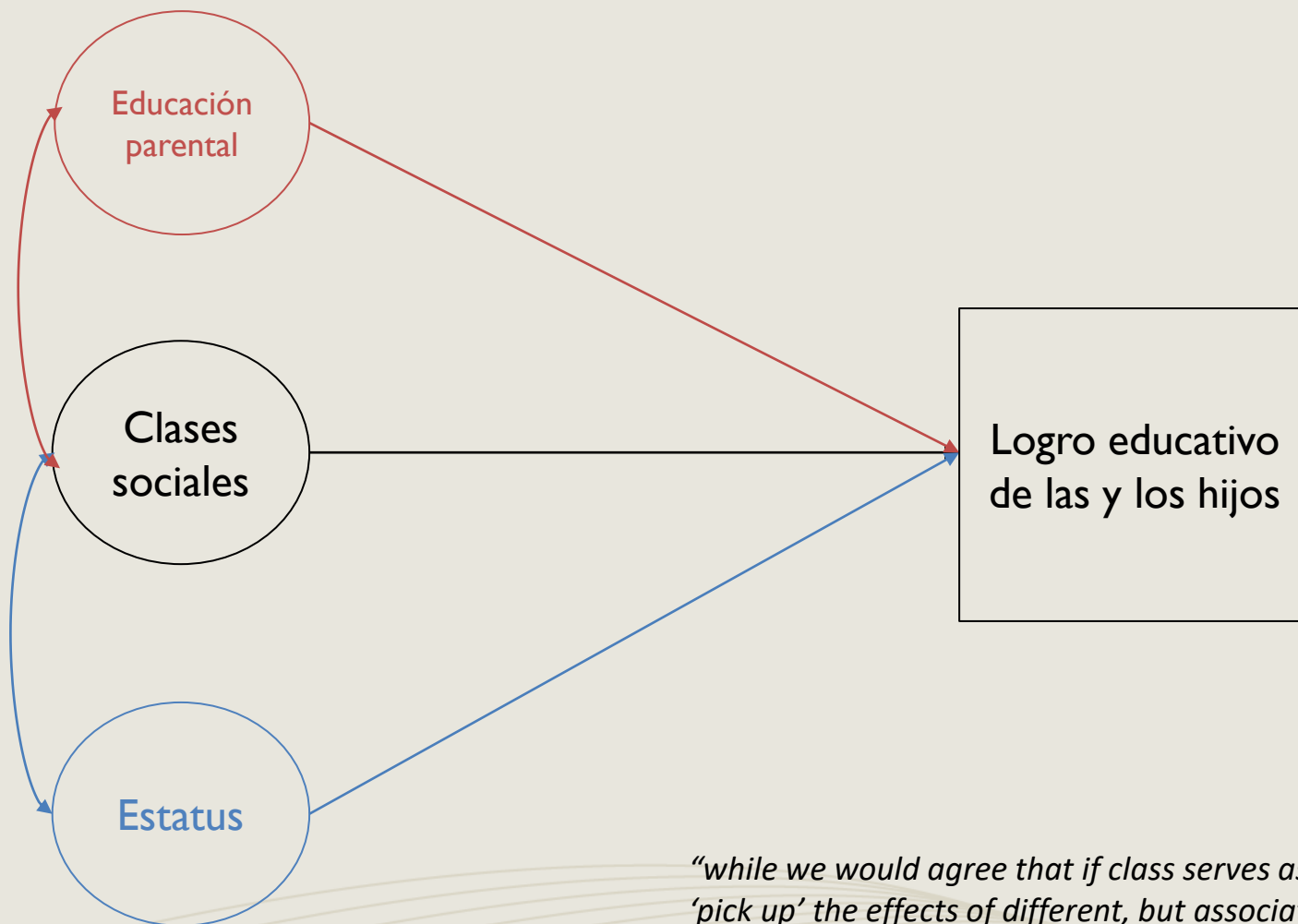


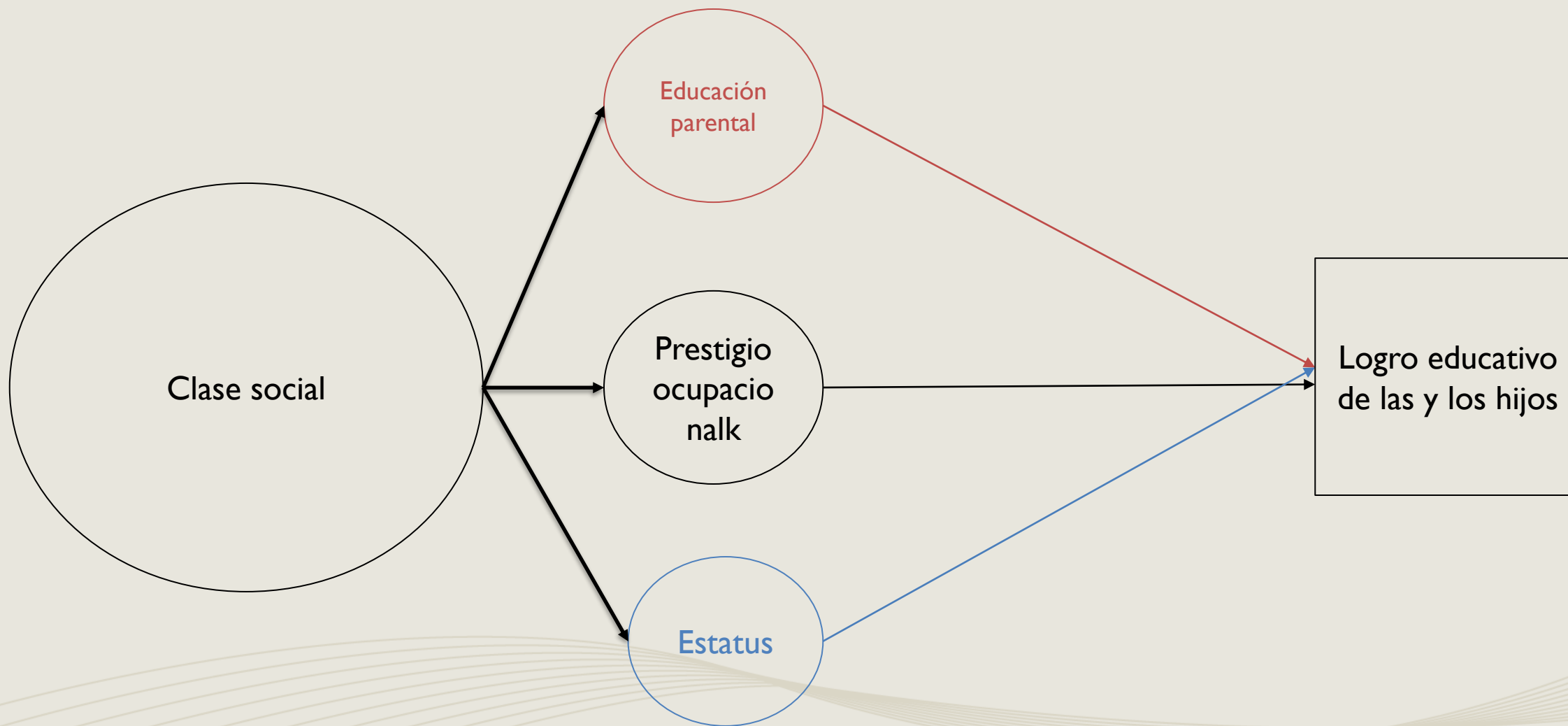
Table 2 The 31 occupational categories ranked by status score and representative occupations within each category

Code	Representative occupations	
1	HP	Chartered accountants, clergy, medical practitioners, solicitors
2	APB	Journalists, investment analysts, insurance brokers, designers
3	SM	Company treasurers, financial managers, computer systems managers, personnel managers
4	TPE	College lecturers, education officers and inspectors, school teachers
5	GMA	Bank and building society managers, general managers in industry, national and local government officers
6	API	Computer analysts and programmers, quantity surveyors, vocational and industrial trainers
7	SET	Civil and structural engineers, clinical biochemists, industrial chemists, planning engineers, software engineers
8	FRC	Conveyancing clerks, computer clerks, library assistants
9	OMO	Security managers, cleaning managers
10	AOA	Clerical officers in national and local government
11	NCC	Accounts assistants, bank clerks
12	APH	Community workers, nurses, occupational therapists, youth workers
13	SEC	Personal assistants, receptionists, secretaries, word processor operators
14	OCW	General assistants, commercial and clerical assistants
15	BSR	Buyers and purchasing officers, technical sales representatives, wholesale representatives
16	CCW	Educational assistants, nursery nurses
17	MPS	Catering managers, hoteliers, publicans, shopkeepers and managers
18	PDM	Clerks of works, farm managers, maintenance managers, transport managers, works managers
19	SW	Cash desk and check-out operators, sales and shop assistants, window dressers
20	HW	Ambulance staff, dental nurses, nursing auxiliaries
21	PSW	Caretakers and housekeepers, hairdressers and beauticians, travel attendants, undertakers
22	PSP	Fire service and police officers, security guards
23	RWS	Car park attendants, cleaners, counter-hands, couriers and messengers, hotel porters, postal workers
24	CW	Bar staff, chefs, cooks, waiters and waitresses
25	SDC	Despatch and production control clerks, storekeepers
26	SMO	Gardeners and groundsmen, printers, textile workers, woodworkers
27	TO	Bus and coach drivers, lorry and van drivers, taxi drivers
28	SMC	Bricklayers, electricians, painters and decorators, plasterers, roofers, telephone repairmen
29	SMM	Fitters, setters, setter-operators, sheet metal workers, turners, welders
30	PMO	Assemblers, cannery, fillers and packers, food processors, moulders and extruders, routine inspectors and testers
31	GL	Agricultural workers, factory labourers, goods porters, refuse collectors

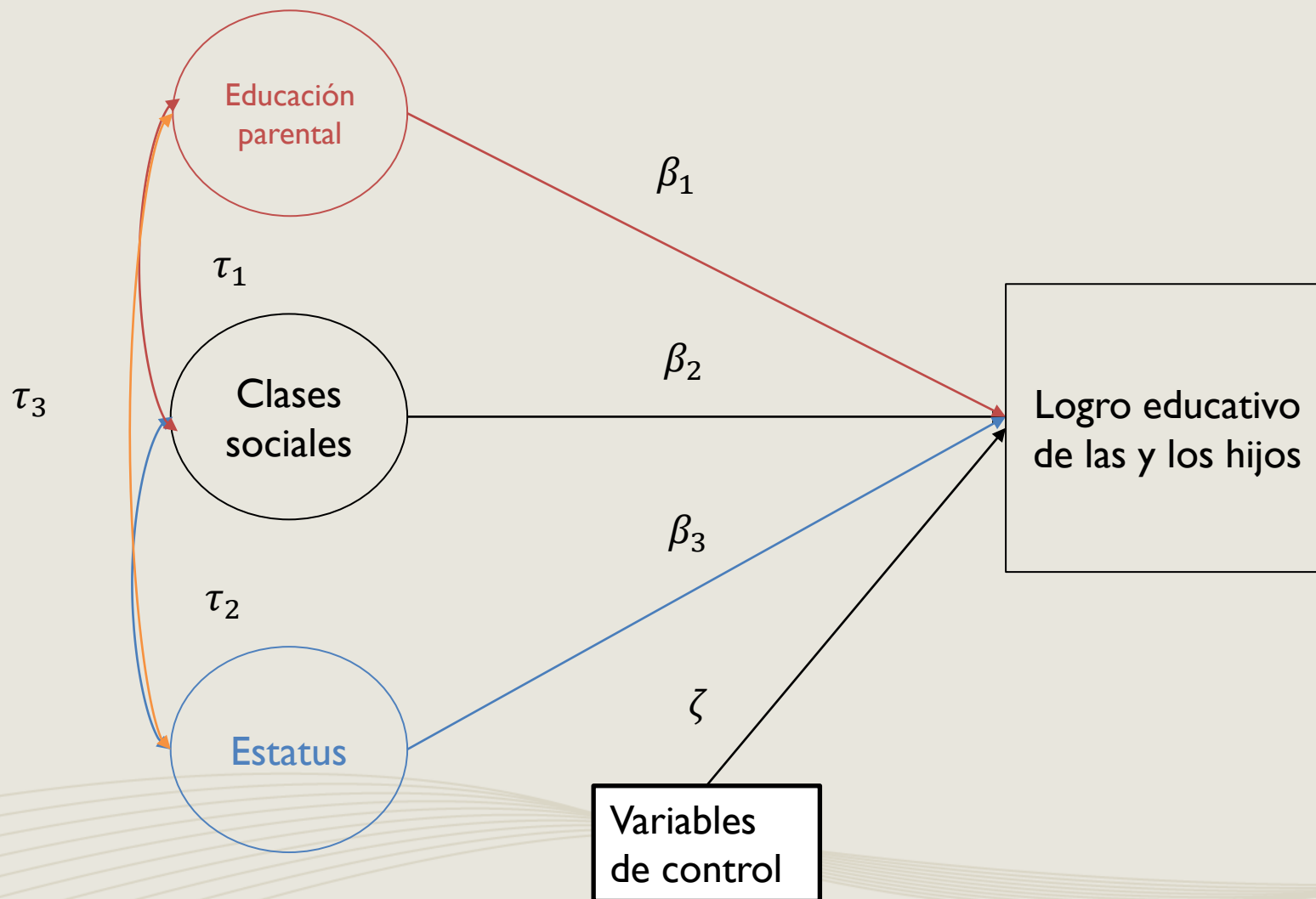
Modelo analítico



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Modelo analítico-estadístico





Resultados

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Origen social

1. Sin calificación esc.
2. Sub-secondary
3. Con secundaria técnica
4. Con secundaria no técnica
5. Secundaria técnica completa y alta calificación
6. Terciaria incompleta
7. Terciaria o posgrado

Table 2 Main effects of cohort and of parental class, status, and education on highest qualification attained by age 34, men, binary logit models, average marginal effects

Independent variables	Qualification thresholds					
	1 vs 2–8	1–2 vs 3–8	1–3 vs 4–8	1–4 vs 5–8	1–5 vs 6–8	1–6 vs 7–8
Cohort						
1946 Cohort	−0.073**	−0.005	0.008	0.013	0.030**	−0.021**
1958 Cohort (ref.)						
1970 Cohort	−0.030**	0.037*	0.020*	0.041*	0.048**	0.033**
Parental class						
7 Routine occupations (ref.)						
6 Semi-routine occupations	0.008	−0.003	−0.002	0.008	0.007	0.026*
5 Lower supervisory and technical occupations	0.068**	0.076**	0.087**	0.060**	0.052**	0.024*
4 Small employers and own account workers	−0.002	−0.002	0.036*	0.038*	0.029	0.046**
3 Intermediate occupations	0.065**	0.081**	0.108**	0.101**	0.087**	0.070**
2 Lower managerial and professional occupations	0.032	0.046*	0.113**	0.083**	0.074**	0.068**
1 Higher managerial and professional occupations	0.022	0.056*	0.152**	0.132**	0.117**	0.095**
Parental status						
Score	0.212**	0.228**	0.178**	0.163**	0.145**	0.086**
Parental relative education						
Level	0.186**	0.221**	0.273**	0.249**	0.229**	0.190**

* $P < 0.05$; ** $P < 0.01$.



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* $P < 0.05$; ** $P < 0.01$.

¿Es mayor el efecto de la clase social alta respecto a la clase social baja?

Conceptualmente ¿qué pensarían?
¿Y analíticamente?

Efectos multiplicativos de la desigualdad en origen social

Type	Class	Parental Status	Education	Illustrative cases
1	4	4	4	Father: solicitor; mother: schoolteacher; both have degree-level qualifications
2	3	3	3	Father: store manager; mother: theatre nurse; both have higher secondary qualifications
3	2	2	2	Father: dispatch clerk; mother: hair-dresser; both have lower secondary qualifications
4	1	1	1	Father: factory machinist; mother: laundry worker; neither has qualifications
5	1-3	4	4	Father: parks manager; mother: part-time social worker, with degree-level qualification
6	4	1-3	4	Father: works manager; mother: not employed but has degree
7	4	4	1-3	Father: sales manager; mother: not employed; both have lower secondary qualifications
8	2-4	1	1	Father: self-employed painter and decorator; mother: not employed; neither has qualifications
9	1	2-4	1	Father: school caretaker; mother: part-time sales assistant; neither has qualifications
10	1	1	2-4	Father: gardener; mother: not employed; has lower secondary qualifications

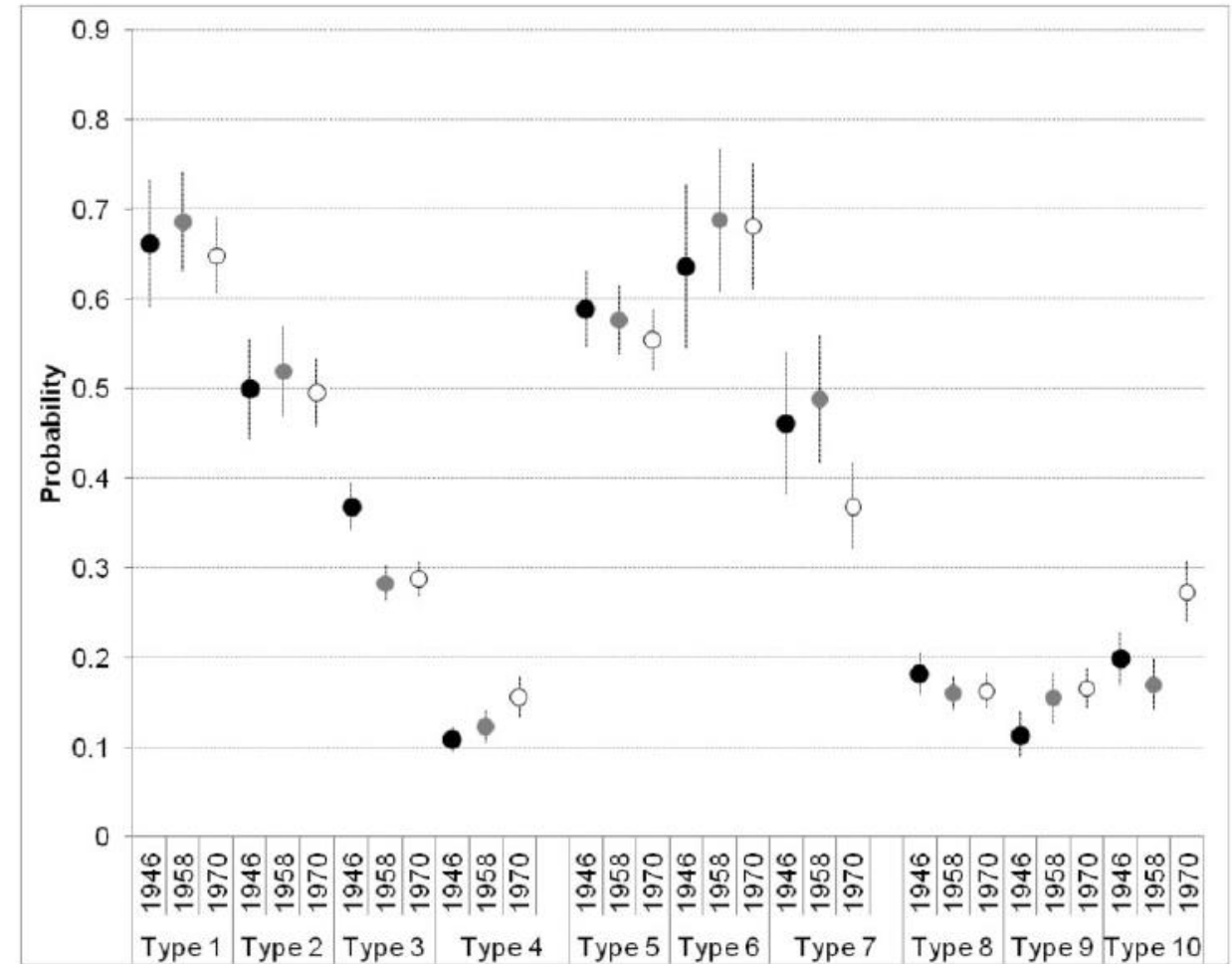


Figure 1 Probability of attaining higher secondary or tertiary level qualifications by cohort and type of hypothetical parents, with 95% confidence intervals, men

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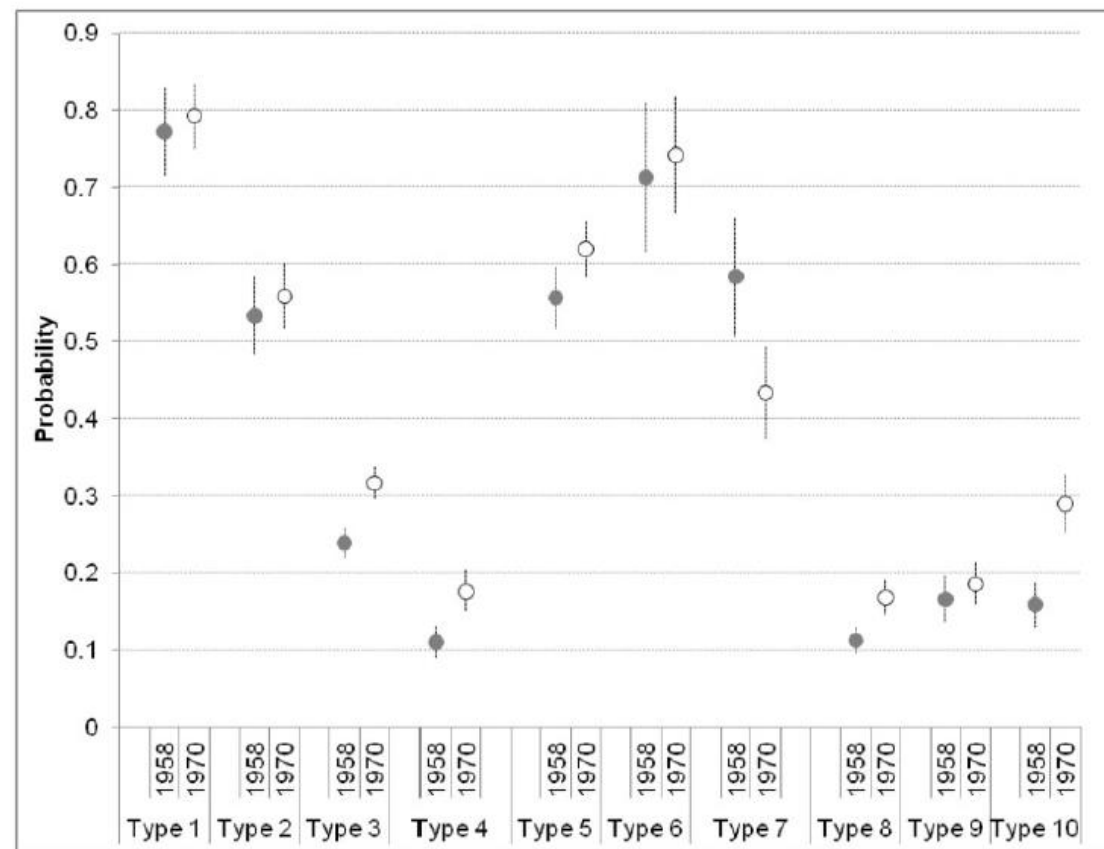


Figure 2 Probability of attaining higher secondary or tertiary level qualifications by cohort and type of hypothetical parents, with 95% confidence intervals, women

Analysing Social Inequality: A Critique of Two Recent Contributions from Economics and Epidemiology

John H. Goldthorpe

Two recent studies focusing on issues of social inequality are reviewed, one the work largely of economists, the other of epidemiologists. In both cases, the conceptualization and in turn the analysis of social inequality appear inadequate. In the case of the economists, concerned with whether, under New Labour, Britain has become a more equal society, attention is concentrated on changes in income distributions to the neglect of the distinction between the attributional and the relational aspects of inequality. The analyses presented reveal serious gaps and a lack of integration that could have been avoided through their grounding in some concept of class stratification. In the case of the epidemiologists, concerned to show a contextual effect of social inequality on population health and other outcomes, stratification is treated as one-dimensional, with no distinction being recognized between class and status. It is in fact status rather than the material inequalities associated with class that are seen as crucial in mediating the supposed contextual effect. But the inferences that are made from the available data on income distributions to inequalities of status and their consequences are often of a doubtful kind.

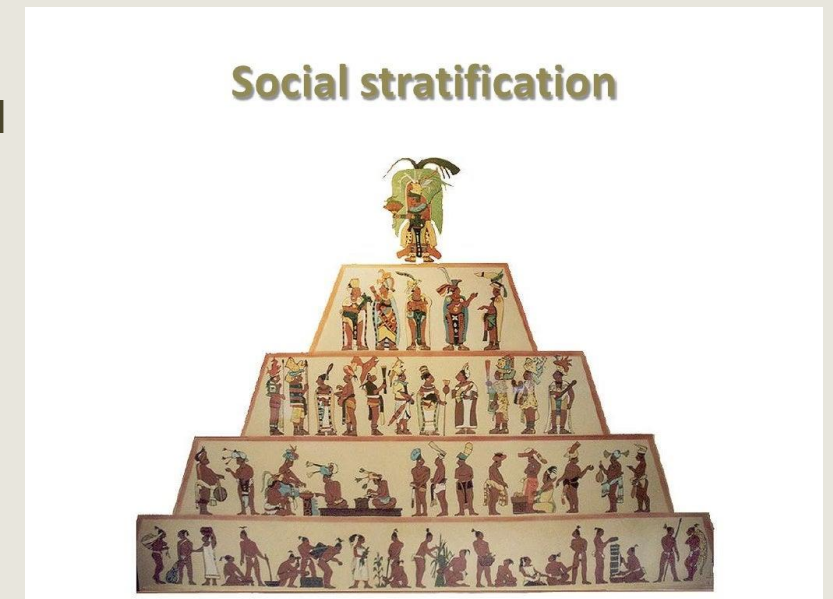


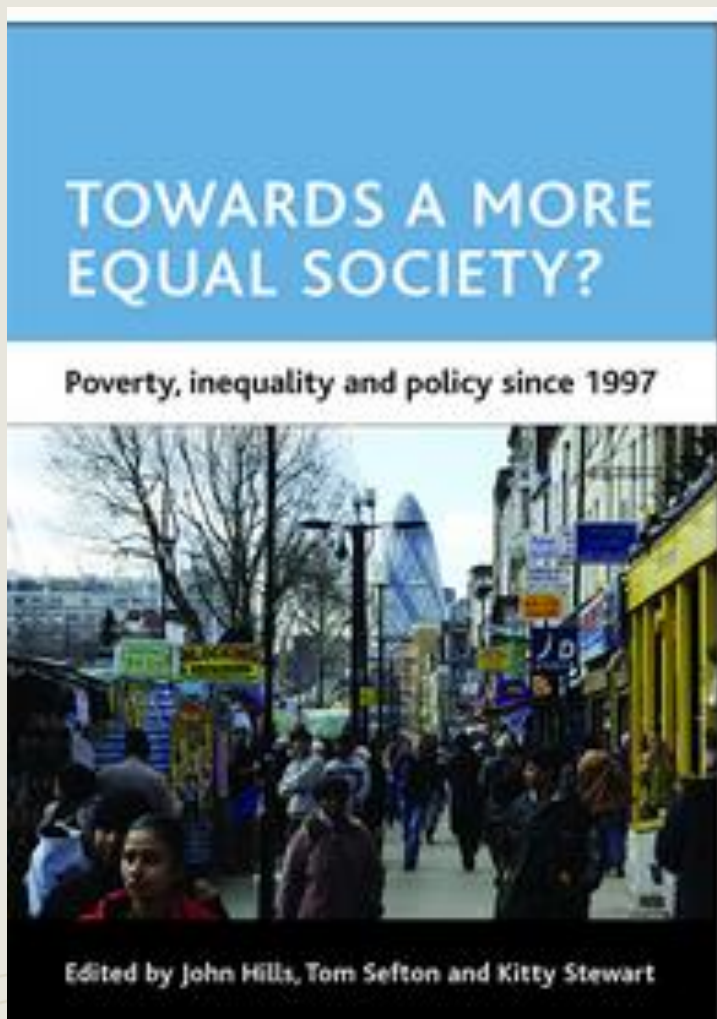


- ¿Es más o menos desigual la sociedad? ¿Son justos o injustos los resultados observados?
- ¿Cuál es el efecto de la desigualdad social en los resultados en salud?

Desigualdad social

- Atribucional: Distribución ordenada de atributos entre personas
- Relacional: Las relaciones sociales que guardan las personas en un contexto donde unas son más aventajadas que otras. Esto es la desigualdad social que está estructurada de alguna manera (estratificación).
 - La posición de las personas depende de la estructura social y no solamente de la fortuna individual
 - La estratificación predice entonces la distribución de las posiciones de las personas en función de sus atributos
 - La clase social y el estatus son quizá dos de las manifestaciones más claras de la estratificación



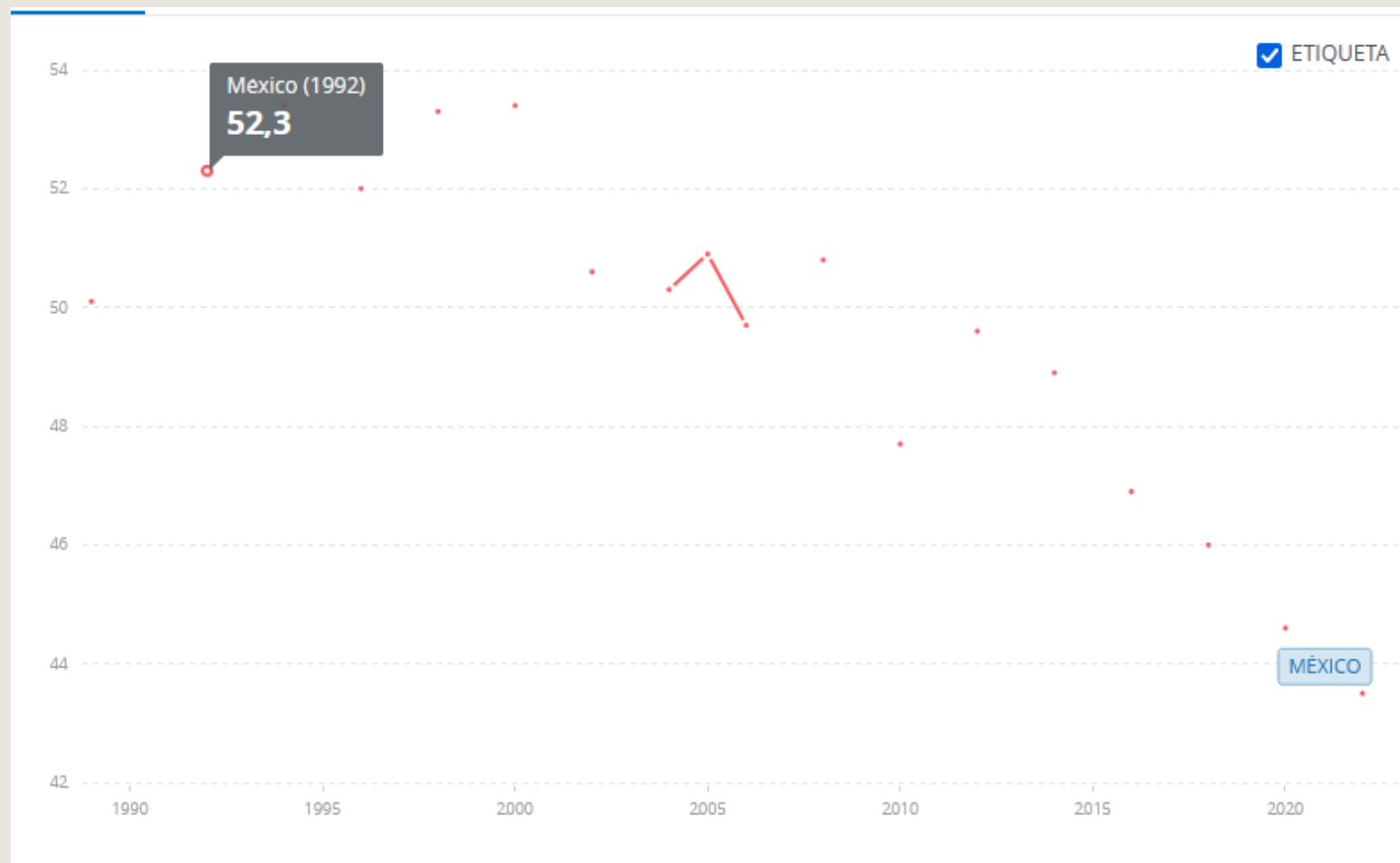


Goldthorpe: *“The treatment of questions of social inequality by contributors to the HSS volume could be regarded as being fairly typical of economists in general. And my critique does then have a wider application than to this volume alone.”*

No es clara la relación analítica esperada entre cambios en la distribución del ingreso y cambios en la desigualdad social

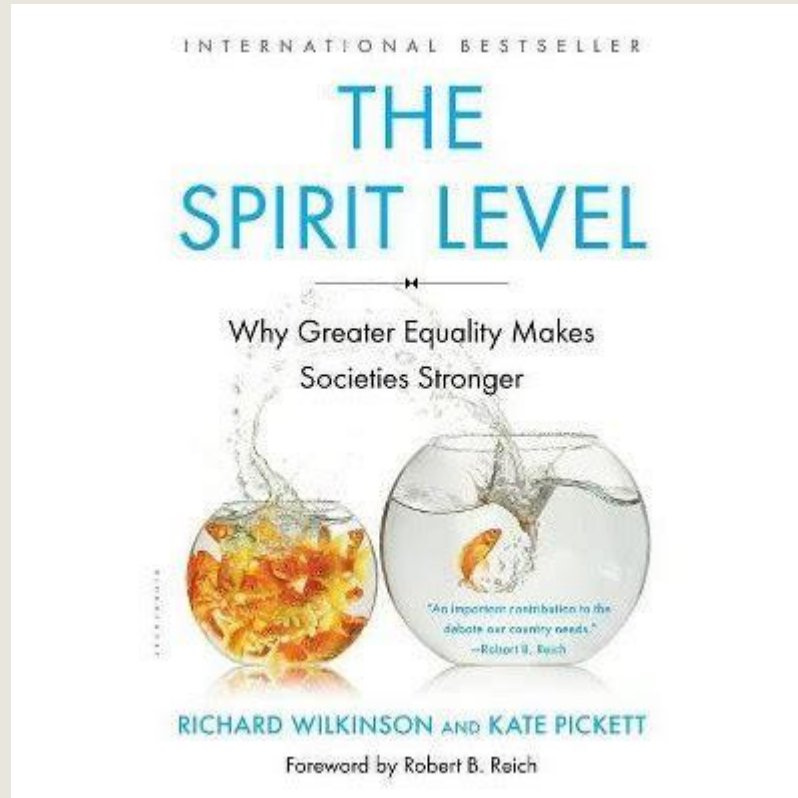


¿Hacia una sociedad más justa?



¿Es México una sociedad más justa?

¿Qué diría Goldthorpe al respecto?



Sociedades, económicamente avanzadas, que son más igualitarias tienden a tener mejores resultados que aquellas que no lo son

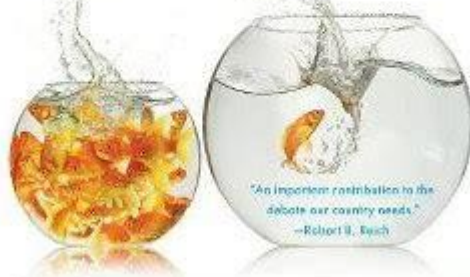
Los diferenciales del ingreso son representativos de desigualdades subyacentes en estatus

Se afirma, entonces, que las diferencias en estatus están estrechamente relacionadas con la fragilidad y la ansiedad de las personas.

INTERNATIONAL BESTSELLER

THE SPIRIT LEVEL

Why Greater Equality Makes
Societies Stronger



RICHARD WILKINSON AND KATE PICKETT

Foreword by Robert B. Reich

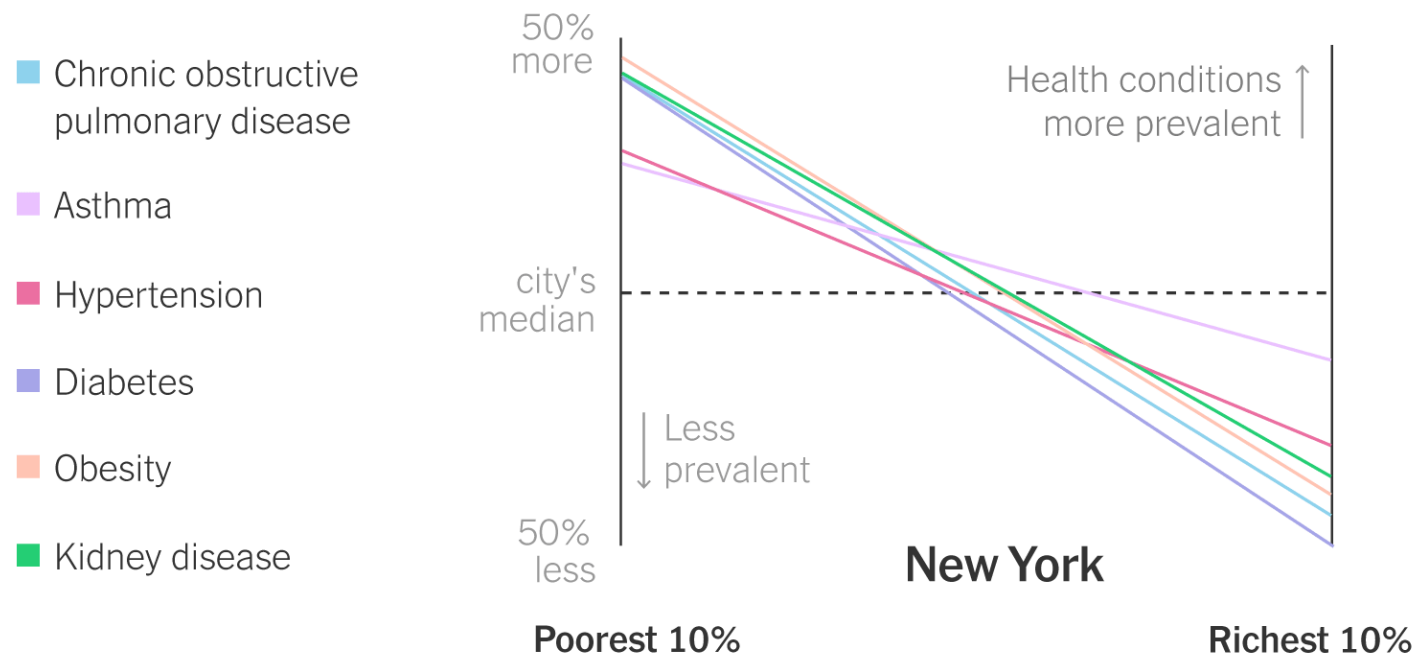
Goldthorpe: En sociedades avanzadas la relación entre estatus e ingreso es muy débil.

Por ejemplo, en Japón. Alta jerarquía de estatus pero baja desigualdad del ingreso.

La relación fuerte es entre clase social e ingreso.

Desigualdades en Salud

Health conditions among top and bottom 10% of income earners



Desigualdades en salud

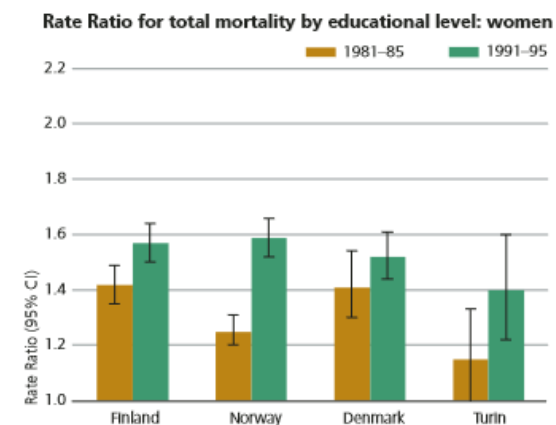
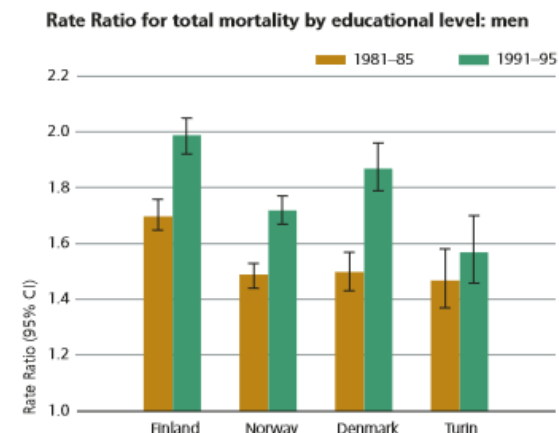
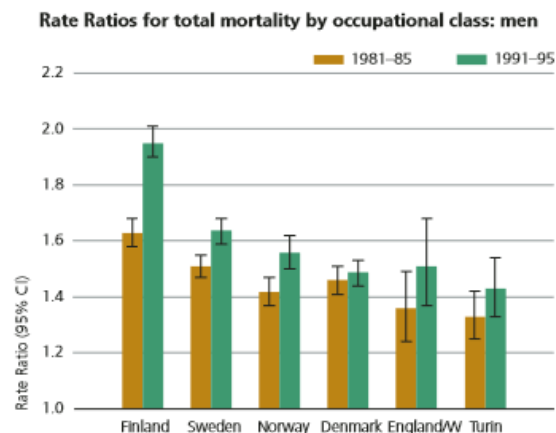
- Virchow (1821–1902): La vida y la Muerte no son fenómenos puramente biológicos, sino que están altamente relacionados con las circunstancias sociales
- Rudolf Virchow (1821–1902 “medicine is a social science”).
- Black report in England in 1980, which first highlighted the widening of health inequalities despite the rise of the welfare state in the decades after World War II. The Black report contributed to heightened awareness of health inequalities all around Europe.



Aunque la mortalidad ha disminuido en todos los países desarrollados, la brecha del riesgo relativo ha aumentado y sigue siendo mayor para las personas en clases sociales inferiores

Relative inequalities in mortality have increased in all countries.

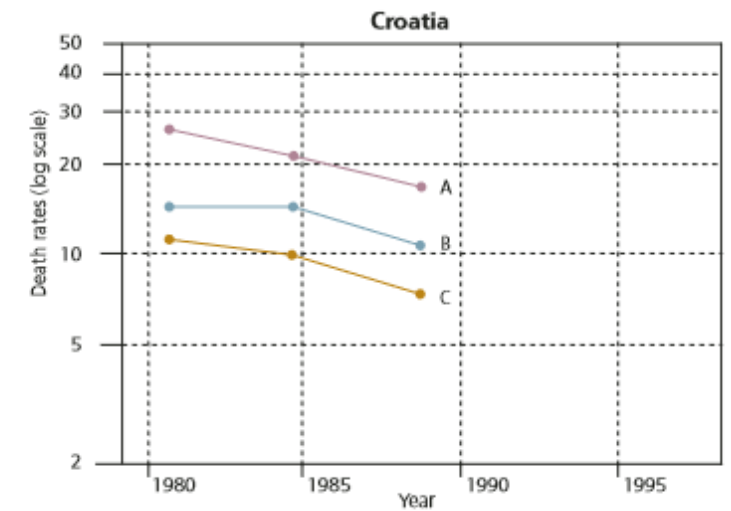
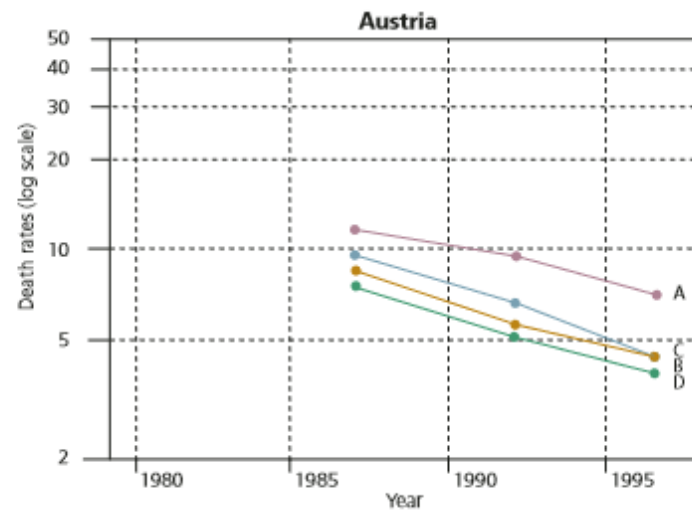
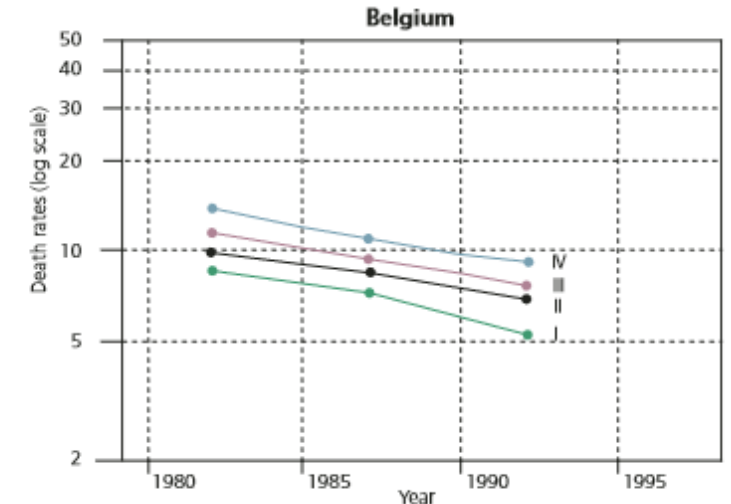
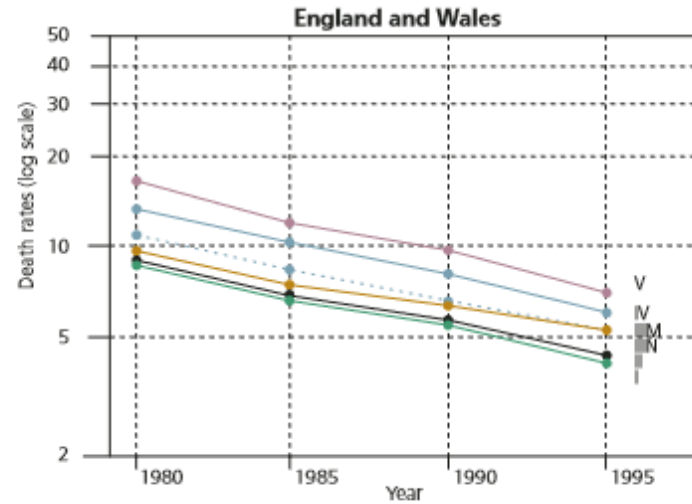
Box figure. Inequalities in mortality by educational level and occupational class, 1981–1985 and 1991–1995. Finland, Sweden, Norway, Denmark, England/Wales, Turin.



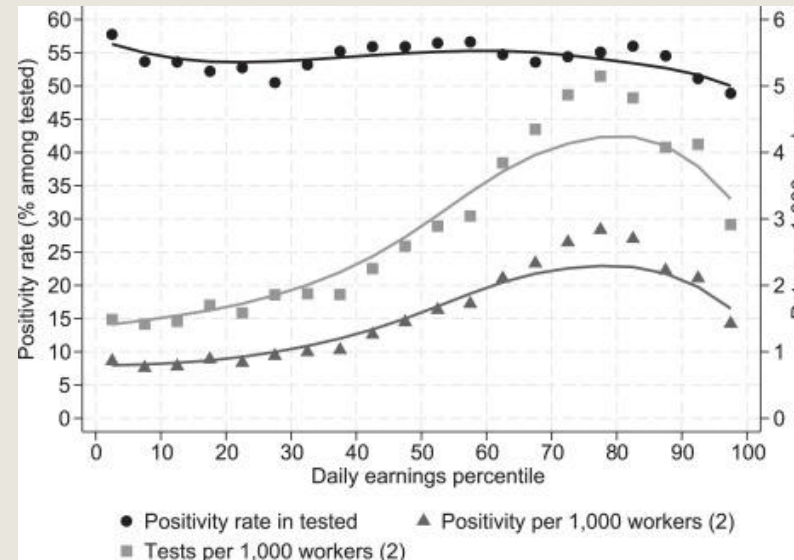
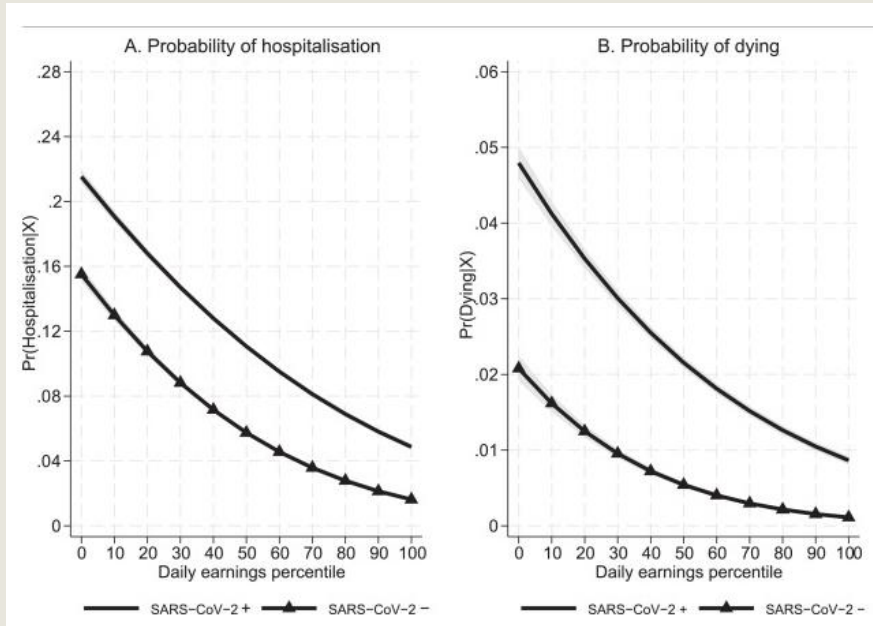
Source: Mackenbach JP, Bos V, Andersen O, et al. Widening socio-economic inequalities in mortality in six Western European countries. *Int J Epidemiol* 2003; 32: 830–837.

NOTE: 95% CI = 95% Confidence Interval
This is an indication of the influence of random variation, and gives the range of values which, with 95% probability, contains the true value.

Mortalidad infantil y clase social



Desigualdades en salud y COVID-19



The Lancet Regional Health - Americas
Volume 6, February 2022, 100115

Articles

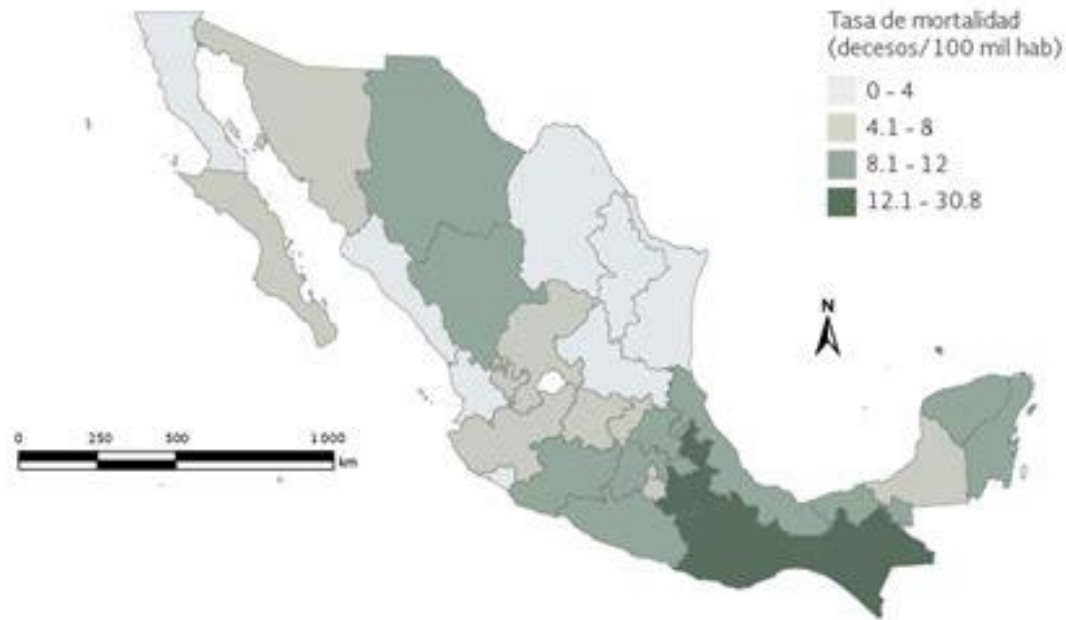
The income gradient in COVID-19 mortality and hospitalisation: An observational study with social security administrative records in Mexico

Eva O. Arceo-Gomez ^a, Raymundo M. Campos-Vazquez ^b, Gerardo Esquivel ^c, Eduardo Alcaraz ^d, Luis A. Martínez ^d, Norma G. Lopez ^d

La desigualdad constituye un lugar en particular



Mapa 1.11 | Mortalidad por enfermedades infecciosas intestinales en menores de cinco años por entidad federativa, 2011



Fuente:
SINAVE, DGE, Salud. Panorama Epidemiológico y Estadístico de la Mortalidad. SINAVE, DGE, Salud. México. 2010.



Fuente:
SINAVE, DGE, Salud. *Panorama Epidemiológico y Estadístico de la Mortalidad 2010*. México. 2012.



Próxima clase

- Gordon (2006): [The concept and measurement of poverty](#)
- Townsend (2014): [Conceptualising poverty](#)