Studies on poverty, marginalization and inequality in Monterrey

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Resumen

El texto es una revisión crítica de los diferentes estudios que se han desarrollado en el Área Metropolitana de Monterrey sobre pobreza, desigualdad y marginación. Dichos estudios se han caracterizado por una escasa profundidad conceptual y por la ausencia de continuidad que permita hacer comparaciones en el tiempo. Este trabajo revisa los aportes al estudio de la pobreza, la marginación y la desigualdad en el AMM, al tiempo que advierte sobre elementos esenciales para una mejor comprensión de estos fenómenos en una región de gran importancia económica para el país.

Palabras clave: desigualdad, marginación, pobreza, Monterrey, México.

Abstract

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The text is a critical revision of the different studies carried out in the Metropolitan area of Monterrey on poverty, inequality and marginalization. Said studies have been characterized by a scarce conceptual depth and by the absence of continuity which allows making comparisons along time. This work revises the contributions to the study of poverty, marginalization and inequality in Monterrey’s Metropolitan Area (MMA), at the time it warns about essential elements for a better comprehension of these phenomena in the region, which have great economic importance for the country.

Key words: inequality, marginalization, poverty, Monterrey, Mexico.

Introduction

This work must be understood as a the state of the art of the studies on inequality, poverty and urban marginalization and the marginalized in the Metropolitan Area of Monterrey (MAM), in the framework of the academic interest recently spurred by the phenomenon of poverty in the region and the economic leading role of it in the context of the national economic restructuring. At the same time, this text wants to establish some important lines in the study of poverty in the region.

Historically, MAM has been characterized at national level by its distinguished role in industrial activity; Monterrey is acknowledged as a zone with a privileged economic situation; few times, nonetheless, the fact that the economic inequality prevailing in the zone is one of the largest in Latin America has been underscored. At the same time that these tendencies have remained, for two decades the economy of Monterrey has faced the process of restructuration proper to policies at national and international level; said, process has created, among other effects,
changes in the structure of labor and in the demand of labor force, labor flexibility and increase in informal employment, at the same time the opportunities of employment have deteriorated (Aguilar and Escamilla, 2000: 185).

It may be stated, that MAM, similarly to other metropolitan zones in Latin America, is a privileged space to observe the contradictions of the current economic processes and their relation with the social structure; hence, the relevance of studying aspects such as poverty.

In order to acknowledge poverty and the poor in Monterrey, it is necessary to go back to the studies undertaken between 1960 and 1980, a period when most of the literature on the topic was developed. Besides the works of the econometric kind, which distinguish the extreme inequality in income distribution, the poverty in Monterrey can be acknowledged by means of studies that observe aspects such as rural-urban migration, irregular settlements and urban popular movements, among other; only in recent years have studies been carried out from the perspective of the economic strategies developed by the domestic units in poverty and extreme poverty to survive.

The structure of this work is due to the sort of approaches and topics used to speak of the poor and poverty in Monterrey. In the first place, we distinguish those works that utilized the approach of inequality; secondly, we approach rural-urban migration (perhaps one of the most developed aspects in the literature on the region), irregular settlements, slums and urban popular movement, then, we discuss urban marginalization, to close with the domestic strategies.

A constant in the works on poverty, marginalization and marginalized people in Monterrey is the absence of conceptual frameworks; few are the studies which detail or discuss the concepts related to the topic. It is so that for each of the approaches and topics, I will include the necessary conceptual definitions, in which the referred texts may be framed.

**Inequality in Monterrey**

According to Sen (1992), ‘inequality’ must not be matched with ‘poverty’, since each word refers to different problems, however this does not mean they are unrelated; the author argues that inequality, on its own, does not strictly refers to poverty in the sense that “a transference of incomes from a person of the superior income group toward one in the mid range has to reduce inequality ceteris paribus; yet it may create the perception of a virtually intact poverty”. In the same way, he goes on, “a generalized diminution of the income that does not alter the measure of chosen inequality may lead to sharp increases in hunger, malnutrition, and the evident suffering (Sen, 1992: 313). This means that by studying inequality we are not studying poverty, in determinate cases however, we might be referring to it.
In this same line of reflections, Cortés (2002: 21) presents his argumentations referring to three different ways to relate distribution and poverty: ‘constant available income’, ‘growing available income’ and ‘decreasing available income’. The first is that which registers an increment of inequality because the participation of the superior deciles increases and those of the inferior decreases, so this greater concentration will become higher poverty.

Growing available income occurs when the quantity to be distributed increases and inequality remains the same; decreasing available income is that which takes place in economic crises, when the amount to be distributed contracts but inequality remains constant, reason why poverty increases.

The study of inequality is important when the poverty in a region or zone is approached, since the former provides information on the economic structure that frames, among other factors, the condition of poverty; in this respect, Escobar et al. (1999: 75) mentions that “poverty is the fruit of the distribution of income and the satisfaction or not of basic needs along this distribution”. The structure of inequality becomes ever important if we take in account the factors that hinder the abandonment of poverty or those which make the success of certain poverty-alleviation policies difficult. In the case of Monterrey, inequality has been linked to the economic and political structures, which are interrelated in such manner that they perpetuate the existence of inequality in MAM.

The main contribution of the studies on income distribution and marginalization in MAM is the demonstration that in this urban area there exists one of the most uneven levels of income distribution in the continent; as it is showed by the works by Anson and Gómez (1978: i), Puente (1969: 6) and Vellinga (1988: 106). The last two authors and Raúl E. López (2002: 18) concur on the fact that income inequality has a tendency to be ever “inequitable”. In this sense, according to Cortés (2002: 12) we can talk about a situation of constant available income.

In the context of the accelerated industrialization process of MAM, the mass movement of population from the countryside to the city made the low income social strata increase in Monterrey, as labor force offer surpassed the absorption capacity of industry; this brought the disproportionate expansion of unqualified occupations in the tertiary sector, and according to Puente (1969: 75), in the case of Monterrey there was “a clear stagnation of the general level of real wages between 1960 and 1965”; and the author goes on to state that in 1960 Monterrey generated more than 10 percent of the national industrial production, and at the same time, circa 68 percent of the population did not consume the minimal amount of nutrients, technically recommendable, nor did it manage to satisfy “a humanly acceptable minimum of other wellbeing satisfiers” (Puente, 1969: 6).

For the decennials from 1965 to 1985, Vellinga (1988: 107) finds that changes in economy largely benefitted the upper middle class; hence, “50 percent of the poorest families witnessed a diminution in their participation in the distribution
of gross income, from 19 to 16.46 percent; the wealthiest five percent increased its share from 31.23 to 33 percent”, proportions which are only comparable in the American continent with the unequal distribution levels found in Brazil for a similar period.

Martínez (1999: 108) explains the general deterioration of real wages along two decades (referring to the 1976-1988 period) from the moderation in the increases in wages. For this researcher, the uneven distribution of income caused in 33 years (1965-1998) a wider income breach in the city, accompanied by tendencies such as the increment in wage disparities between qualified and unqualified labor force, a lower employment rate, creation of precarious jobs, low payments and low productivity, permanent wage deterioration, disparity in education access, among other things (Martínez, 1999: 117).

Other data also reveal that inequality has been steady and even growth in the zone; Aguilar and Escamilla (2000: 206-207) notice that in the 1991-1995 period “there was social polarization reflected as a ‘growth’ of both ends of the social structure”. The authors are based upon data which unveil the increment of highly qualified labor force (independent professionals, technical staff, directors and directive personnel) and the expansion of less qualified labor force (merchants, salespeople, service providers, drivers), in addition to the diminution of wages and the polarization of the occupational structure.

From the analysis of dependent nature, Vellinga provides an argumentation to explain the persistence of high concentrations of income and wealth in Monterrey; the author mentions that these tendencies correspond to the characteristics of the large industrial zones in Latin America, and which besides have to do with the “patterns” that have been “socio-politically and culturally anchored in the Latin American society” (Vellinga, 1988: 13); this author relates inequality not only with the economic role of Monterrey, as an industrial pole of a peripheral country, but also with the concentration of political power, in this sense, he expresses:

In Monterrey, the accumulation process generated the supporting point of one of the most influential actors in the distribution phase: industrial bourgeoisie. It was during this process when the objective base of its formation appeared, as well as its consolidation as a social class. The magnitude of the accumulation determined, at the same time, the reach of its pressure capacity before the State —another influential actor—, in favor of policies which supported accumulation and distribution according to its interests. As a result, the structure of power in the region has been dominated by a small and coherent industrial class (Vellinga, 1988: 22).¹

¹ In this respect Balán et al. (1977: 357) mention that in Monterrey “the large industry and financial enterprises are linked to familial bonds or mutual interests, which allow them to effectively work as a block. That entrepreneurial elite is clearly differentiated from the political elite, yet in the case of Monterrey, likely atypical in Mexico, the leaders of the Institutional Revolutionary Party work as intermediaries between the entrepreneurial elites and the federal government, with not much independent power of their own”
This political structure has remained thus far, and maybe it has been reinforced; a genealogy of political power in the state might prove so. Although it is not the case of this text to deepen into this topic, in the last section I will insist on the need of taking it into account.

**Rural-urban migration**

Migration is one of the survival strategies that domestic units use in the contexts of poverty, and it can be understood as a “demographic functioning”, it is, a “capability of the people to function”, which consists in being able to displace and settle down (Livi-Bacci, 1995: 117 and 127). Migration can also be comprehended as a “response” that is part of “broader” strategies (Corbett, 1988: 1100) the poor produce to survive in crisis circumstances. Despite there are other approaches which break the direct and single-casual linkage between poverty and migration, it is a fact that migration is one of the structural factors associated to the problem of urban migration (Pozas, 1990: 18).

In Mexico, as from the 1940’s decade rural migration of mass and definitive character, started to prevail, heading for the largest cities in the country, especially Mexico City, Guadalajara and Monterrey. This process was constantly debated in social sciences between 1960’s and 1980’s decades (Durand, 1994: 41); at least at a local level rural migration to Monterrey deserved some studies.

Poverty in Monterrey and internal migration are linked not only because of the origin of the migrants (impoverished peasants), but because of their situation in the arrival place. According to authors such as Browning and Feindt (1968: 184), between 1940 and 1965, the demographic growth of Monterrey was exceptional, as the population of its metropolitan areas grew five times, changing from 186 000 to 950 000 inhabitants. According to Balán et al. (1977: 81), “from a 5.9 annual growth rate between 1940 and 1950, 3.6 percent was due to net immigration, this is, 61 percent of the total; the figures corresponding to the 1950-1960 decade were 6.3 [from expansion of the geographic area of the city], 3.3 percent [natural increment] and 52 percent [from net immigration]”. Zúñiga (1995: 191) presents figures as from 1960, where the natural growth was 3.39 percent and the social rate was 2.8 percent. Between 1970 and 1980, the total growth was 4.67, the natural one was 3.4 and the social decreased in importance (1.27 percent). Moreover, for the 1980-1995 period the social growth was higher than the natural.

In the literature on urbanization in Monterrey, the marginalized are constantly related to these migratory waves (Zúñiga, 1990) to such an extent that one risks to think that the poor in Monterrey are not native, but from San Luis Potosi, Coahuila, Tamaulipas or Zacatecas (among other migrant-ejecting states). 

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2 Durand (1994: 30-45) shows how as from the early XX century migration has been explained taking into account other non-economic factors.

3 Acevedo (1979: 42) mentions that between 1970 and 1976, 220 thousand migrants arrived to MAM.
One of the effects from the high immigration rates was “the process of metropolization” (Pozas, 1990: 19) that occurred when the urban area took in diverse municipalities whose growth was determined by their relation with a central municipality, which in this case is Monterrey. Hence, by 1970, eight municipalities composed MAM, which already reflected the stark contrasts between privileged zones and the peripheral settlements (Pozas, 1990: 19). The migrants from the countryside settled, largely, in the marginalized zones in this process of metropolization.

Nowadays, the main internal migratory flows are from city to city (Escobar et al., 1999: 95); notwithstanding, in addition to the urban migrant population, MAM still receives a large number of migrants from rural zones or small cities, in such manner that at national level, Nuevo Leon holds the first place in inter-municipal migrant population (INEGI, 2001) and the fourth in intra-state migrants. As I will point it out in the section on domestic strategies, a large part of these migrants dwell in zones of high marginalization.

Marginalization and marginality

Migrants to MAM arrived in a region characterized by the contradictions proper to the logic of development and policies of importation substitution; in such manner that they composed, largely, the highly marginalized areas in the process of metropolization and urbanization of Monterrey.

According to Cortés (2002: 10; based on Conapo/Progresa, 1998: 17), the concept of marginalization gives an account of the structural phenomena “which arise from the difficulty of spreading technical progress in the set of the productive sectors, and it is socially expressed as persisting inequality in the participation of citizens and social groups in the process of development and the enjoyment of its benefits”. To measure marginalization, Cortés states, indicators such as education, housing and monetary incomes are taken into account at municipal level, and at State level dispersion of population is added; in this sense:

Once defined the dimensions, the percentage of illiterate population is used as an education indicator; the percentage of private households without piped water, private households without drainage, private households without electric light, private households with dirt floor and the average of dwellers per room as indicators of the household dimension (Conapo/Progresa, 1998: 26; cited in Cortés, 2002: 10)

From this point of view, marginalization is understood as lacks of access to basic goods and services, and it is a phenomenon which refers to localities and not to the people who live in them. This means that in a locality with high

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4 Only surpassed by Federal District, State of Mexico and Jalisco (INEGI, 2001).
marginalization, some of its inhabitants may be illiterate or live in households with piped water or earn sufficient so as not to be considered poor; on the contrary, marginality refers to the conditions of the individuals.

Cortés (2002: 11) mentions that marginality is a concept in the sphere the theory of modernization, according to which “‘underdeveloped’ societies are characterized by the coexistence of a traditional segment and another modern, being the former the main obstacle to reach self-sustained social and economic growth”; the marginal, in this sense, “remits to the zones where the norms, values and the ways of being of modern man have not permeated”. Marginalization then refers to a structural phenomenon, whilst marginality is rather individual.

Marginality includes certain dimensions worth mentioning here, as they work as a preamble for the literature on the marginalized in Monterrey. According to Cortés (2002: 12; citing Giusti,1973), the Social Development for Latin America Center of Research and Social Action (Desal) established the following dimensions, all of them referred to individuals not to localities, municipalities or states: a) ecologic dimension: referred to the places where the marginalized live; slums, deteriorated households in the city, neighborhoods of state or private origin; b) the socio-psychological dimension, where marginality means not to have the capability to act, not having enough resources and social benefits, in social decisions; c) the socio-cultural dimension indicates that the marginalized have low levels of life, health, housing, education and culture; d) the economic dimension shows the subsistence levels and unsteady employment of the marginalized; and e) the political dimension wherein the marginalized do not take part, do not have organizations which represent them, neither do they participate in solutions to social problems.

The literature on marginalized zones and marginality in Monterrey provides us with information, in some cases in detail (Arreola, 1975; Acevedo, 1979; Montaño, 1983; Neira, 1990) on the ecologic and socio-psychological dimensions.

According to Neira (1990: 157), in Monterrey there are very old irregular settlements, some dating back to the early XX century, however the most representative date from 1940, such as Barrio La Coyotera, in Garza Nieto neighborhood, or some zones of La Loma Larga which have been annexed to Independencia Neighborhood, one of the oldest zones in the city. Between 1961 and 1976 there were 44 settlements of landholders (García, 2001: 125). In 1973, Arreola made the following statement which is very illustrative:

By land and from Monterrey downtown we see the conglomerates of motley colors, the groups of white dots that closely turn to be precarious constructions even with concrete bricks. In the map they are red spots scattered along the edge and in some places in downtown itself and in the urbanized zone.
Almost at the geographic half of Monterrey Santa Catarina River flows; in its banks there are landholders; there are also in plots surrounded by urbanization (which perhaps is the phenomenon most similar to ‘slums’) and in mountainous regions: Topo Chico, Sierra Ventana, Cerro de la Campana, Loma Larga, Los Dorados, San Bernabé (Arreola, 1975: 31).

The neighborhoods mentioned by Arreola are still marginalized zones of the city; in sectors such as Sierra Ventana, Neira (1990: 166) found rural life patterns: small orchards, familial farms with swine, chickens and sheep. Nowadays, flocks of sheep might be seen grazing in some sectors of Santa Catarina River, currently dry; in spite of the condition and in opposition to the political dimension proposed by Desal, the marginalized in Monterrey have played an important political role in the region.

On the one side, they have created proper organization ways, relatively autonomous from the state authorities (Zúñiga, 1990: 107); on the other, they have established client relations that may be conceived, as management and pressure channels for the public policies rather than forms of political manipulation (Montaño, 1983: 70); said political pattern remains so far as the main political pressure channel of the marginalized.

It was in the 1960’s when the largest number of mass land invasions took place; back then, there had been space for organized forms of invasions, which not only included leftist leaders and university students, but also members of the popular sectors of PRI (CNOP, CTM, CRÓC), petit bourgeoisies inside the landholders, and even proprietors of plots who agreed on self-invasions to sell their land to the government at a good price. The State, facing the impossibility to respond the grave housing crisis became an accomplice of the phenomenon (Montaño, 1983; Pozas, 1990; Neira, 1990; García, 2001); in this network of public relations, women turned into central actors (Pozas, 1999).

In 1973 the Land and Liberty Popular Front (Frente Popular Tierra y Libertad) the most famous and politically best organized of the urban-popular movements of the zone, said Front exists thus far and preserves its political power in spite of having undergone serious transformations (Montaño, 1983; Pozas, 1990). In that same year, the government of the state recognized the existence of 170 thousand landholders who lived in spontaneous settlements (Montaño, 1983: 159). The response of the State was the creation of the Metropolitan Fomentation of Monterrey (Fomento Metropolitano de Monterrey, Fomerrey), whose objective was “to develop popular urban areas to provide plots, housing, or building material to the mass of destitute and marginalized from the free market of land and urban housing” (García, 2001: 128). Not long ago, however, most of the neighborhoods founded by Fomerrey had a high degree of deterioration, anti-hygienic conditions, poor services and unpaved roads.
Despite the gradual urbanization of Fomerrey neighborhoods, living in them means being socially marginalized and belonging to a world where, in a quotidian manner, there is the precariousness existing in any Latin American large city: insecurity and impunity of urban transport, violence and police abuse, pollution, stacking, lack of spaces and services, as well as political clientelism. Not only is there marginalization in one of the many Fomerrey neighborhoods nevertheless, there is also in any of the irregular settlements which, at least until 1999 were 52 in MAM, according to García (2001: 125).

The marginal in the city are an important part of the political puzzle of society in Monterrey, they historically generated an economic integration as well, since their productive activities are not severed from the capitalist economy, “far from that, they maintain permanent social relations of production with the capitalists under the most heterogeneous forms, relationships that do not necessarily adopt a salaried form” (Pozas, 1990: 25). Hence, we find a large mass of bricklayers and masons, plumbers, gardeners, night guards, janitors and domestic maids, together with ambulant sellers, window cleaners, scavengers and beggars. The same occurs at the social sphere, where they have generated their own forms and spaces of organization and coexistence.

It is verified thus, what Acevedo (1979: 47) calls the “process of marginalization of Monterrey”, which is manifested as a growing proportion of the labor force destined for marginal activities, as the increment of the social and economic distance between the marginalized and the integrated, and as a growing difficulty to change from one situation to another.

An instance of this difficulty to move from marginality to integration is provided by Zúñiga; for this author the children of the marginalized (largely children of migrants) have been benefitted from the urban educational offer, nonetheless this expansion of school benefits did not bring intergenerational social mobility for the marginal; he carries on:

This occurs because of much more objective issues of which the very children of the marginalized are aware. This is to say, school knowledge and a school certificate do not have for them the same economic functions which they seem to have among other urban social groups, to the extent that, in some cases, school does not have any specific labor usefulness (Zúñiga, 1990: 108)

Years before Balán et al. predicted what Zúñiga found; for the period between 1965 and 1985, the authors had mentioned:
Even if their numbers do not increase in relative terms and, at least in a metropolitan center such as Monterrey the relative income does not decrease, the members of this group will feel more dissatisfied… In the first place, the proportion of individuals who can make favorable comparisons with their parents, relatives and friends will be lower because, in proportion, very few of them will have subsistence agriculture as a background. Secondly, the anticipated growth of “credentialism” at all levels will reduce the optimism on the aperture of the system; and finally, many subjects will be less confident that their children might achieve much more higher occupational statuses than theirs by means of the educational way (Balán et al., 1977: 388).

On their own Browning and Feindt (1968) presented the differences in education, housing, occupation and income between migrants with a short time of exposure to the social and economic structure in Monterrey; migrants with intermediate periods; migrants with long exposures; native by adoption; first and second generation natives. The authors also found little mobility in terms of income; their explanations are mainly addressed to the occupational structure.

The marginalized

Lomnitz (1975) argued in favor of an active and positive perspective of the marginalized, opposed to the culture of poverty which deemed them as passive subjects; one of her argumentations was related to the strategies of survival that allowed the marginalized to “take advantage and even create certain sorts of niches in the interstices of the technologic system that excluded them as surplus labor force”. For this author, “in the neural center of such strategies there were the social networks, constituted in virtue of the reciprocity principle”. These networks are the most important resources to obtain help from other people in return to offer it back (Lomnitz, 1975: 9).

In this framework the literature on the marginalized in Monterrey is inserted; these people may be observed as “subjects that produce the urban policy, planners of barrios, builder of their houses, designers of their ways to use the educative institutions” (Zúñiga, 1990: 8), as well as central agents in the conformation of the culture and social organization. In this context, the scholars of marginality in Monterrey have pointed at sectors such as women (Rangel, 1990; Ribeiro, 1990; Arenal, 1999; Arenal, et al., 1997; Pozas, 1999), youths (Hernández, 1990), and extended family networks (Garrido, 1997; González, 2002 and López, 2002). Although most of these studies have been modest and many of them obey to rather individual and conjunctural initiatives, they have become necessary referents to learn about marginality in Monterrey. In the following paragraphs I will distinguish some of the contributions.
As mentioned in the previous section, the experience of invasions to plots and the management of public services has been described in detail by authors such as Montaño (1983) and Neira (1990); in their works they share the complex social and political organization that accompanied the process of integration into urban life of neighborhoods such as El Topo, Paloma and Sierra Ventana; upon said organization the cultural and social origin of the migrants: the extended family as a cohesion point, the use of small orchards and family farms with swine, chickens and sheep. Politically, immigrants used their rural origin to link to an organization such as the National Peasant Confederation and so obtain protection from PRI in urban invasions.

On her own Sandra Arenal (1999) presents the testimonials of women who devoted to obtain a household for their families in the plot of Tierra and Libertad. In the studies by Montaño, Neira and Arenal we see social actors making decisions, negotiating and communicating in the political sphere. Thus, we are given a way to understand politics from the perspective of the underdogs; the poor are understood as a part of the political structure, and not as mere observers of it.

Besides Arenal, Rangel (1990) and Ribeiro (1990) have approached the relation between gender and marginality; the text by Rangel lacks a definition for the culture of poverty, albeit the text seems to be an attempt to document cultural features of the marginalized in Monterrey.

The culture of poverty may be defined as “the set of characteristics and interrelations between the three levels: the economic, the social and the ideological”; as “a system of social organization and of norms and values, which in marginalization, is structured on a characteristic economic base” (Lomnitz, 1975: 24). Rangel makes a relation between the elements mentioned by Lomnitz and what the author found in her experience in the marginalized community called “René Álvarez”; there she found mistrust, silence and lack of rooting of the urban marginalized, who hardly would be able to refer to a tradition, despite their rural origin. With apparent difficulties the author found that the Pastorela (religious interpretation linked to agricultural patterns) was the only tradition remembered by some women from said marginalized community.

Women are marginalized sectors in Ciudad Guadalupe and San Nicolás de los Garza (two metropolitan municipalities), are characterized by Ribeiro (1990: 73) as: largely young, married with children and devoted to house chores; when they work outside their household are condemned to “carry the heavy responsibility of having external and internal roles at the same time (unless they are supported —as it frequently occurs— on their work by other women)”. Even though the statistics do not register this, many of these women work from childhood as domestic maids; this is the characteristic trade of women from marginalized barrios, who are subjected to the labor conditions assigned by their bosses (Arenal et al., 1997: 31-32).
Several years after Arenal, Marlene Cámara (2002) studied the role of women in the strategies of production and reproduction of domestic units in poverty and extreme poverty, in Malvinas and Santa Lucía neighborhoods, metropolitan municipality of Escobedo, and she found generalities and experiences very similar to those distinguished by Ribeiro and Arenal. In this sense, the phenomenon of feminine poverty shows the constants of urban marginality.

Another sector of the marginalized is that of the youths; in his study Hernández (1990: 276) defines them as youths whose most frequent misdemeanors are listening to music at the corners, meet in groups at night, and wearing clothing, language and a walking style different from those distinctive of the majority; these youths use as ordering referent of their social and identity situation aspects such as social class and labor. For some of them labor in construction (*la obra, la costra*) deserves repudiation, yet they live in a generational world which forces them to partake this labor; for some other, the factory (*manual labor, el camello*) is repudiated, thereby they look to escape from this labor destiny.

Most of the texts referred in this section correspond to the effort, coordinated by Zúñiga and Ribeiro, of grouping works that some academicians developed with marginalized sectors in MAM in the 1980’s decade. Nonetheless, the dispersion of the topics, perspectives and the scant conceptual agreement reflect the absence of more systematic knowledge on the problem in its metropolitan dimension.

### Domestic strategies

The topic of resources and domestic strategies has not been broadly developed in the literature on poverty; framed rather in the micro-sociologic studies (Escobar, 1996: 539), these works have offered cases on the behavior of households that face poverty. Studies from this perspective have been scarce in Monterrey, only the fortunate work by Eduardo López (2002) can be mentioned; because of the transcendence of the perspective of the household resources some of its contributions and debates will be mentioned.

According to Roberts (1991: 139), the strategies may be defined as the organization of the households to obtain benefits in the short or the mid terms, while the social mobility strategies are rather linked to long term (schooling, buying a house, labor training). Domestic strategies are then the set of conscious activities, taken up by one or more of the household members in a period, directed to secure the survival in the long term; a domestic strategy supposes calculation and election between several strategies.

The domestic strategies depend heavily on the familial organization and its rules. Although domestic and familial strategies are not the same, the household is the co-residence unit whose members may be relatives or not. The sorts of families, such as nuclear or extended, and the obligations implied in the kinship
are the most important variables that affect the household capability to implement strategies; this is to say, the kinship variable makes a difference in the sorts of strategies (Roberts, 1991: 139).

Every household has assets; Moser (1998: 4) indicates four: work, productive assets (the most important is the household); family relations (which work as a mechanism to join income interests and sharing consumptions); and finally, social capital, which is reciprocity in the communities and among families, based upon confidence from social bonds.

For the poor it is not enough to have assets or funds, but the capability to manage them is indispensable and then being able to reduce their vulnerability. This capability must allow transforming these assets into food and income for instance. Corbett (1988: 1104) adds that these capabilities and their effects transform as they enter into a pre-crisis and crisis process, in such manner that one can talk on a series of strategies applied in a sequential manner. For this author, strategies suppose planning a series of actions; strategies are not, as Moser (1998: 3) would say actions for “dealing with” or “doing without something”, but they imply a longer period of time.

Roberts (1991: 143) proposes four sorts of strategies according to the literature on the topic: a) cutting down on households expenses by decreasing consumption or rejecting nonproductive members of the households; b) intensifying the exploitation of internal resources through wider reciprocity with relatives and friends; c) adopting strategies oriented towards the market which, in the urban context, are usually strategies in labor market and informal economy; d) seek help from external agents, such as the State or organizations. Strategies a and b decrease external dependence, but they are limited by the materials and labor resources available at home. Strategies c and d are less limited in the range of resources that might be gathered, but increase dependence and may limit the flexibility of the strategies of the households in the future. According to the author, urbanization and industrialization have increased the use of strategies directed outside the households, for in the urban sphere the need for services is only satisfied by going outside, particularly toward the State; in such manner that “the modern urban household has a limited capacity to control its environment through the use of strategies”.

This capacity has been limited or modified in the restructuring period; for Oliveira (1999: 33), the contraction of wages and the deterioration of labor conditions have made more family members be income recipients to compensate for the low payments as labor force. Thereby, the model of family organization characterized by the presence of a single provider male-head, whose salary is sufficient to support the household, and by a woman-housewife only in charge of the household has lost validity. Hence, “the recent economic transformations have echoed selectively on the most needed families, thus reinforcing the heterogeneity of the forms of familial organization prevailing in different social sectors”.

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This means that the most important resource of poor households, labor, has been severely affected. In this framework, nuclear families are still depending on the incomes from a single recipient, frequently the head; conversely, extended arrangements (predominant in the poorest sectors), as they have larger labor force availability and its larger size and being in a more advanced stage of the domestic cycle, have resorted to incomes from several members. Nevertheless, “it seems as though we face a vicious cycle: in the poorest sectors of society extended arrangements prevail, which because of the characteristics of their heads remain poor despite the more extensive use of family labor force”, for “a larger number of recipients is not always associated to a higher level of welfare for the families, and the per capita income rather depends on the income amount of the main recipient and their man or woman condition” (Oliveira, 1999: 33).

In the same sense, González de la Rocha (2001) argues that because of the deep restructuring and the difficult economic and social situation which has characterized the last two decades, poor and working-class households have moved toward a situation permeated by resource poverty that erodes their survival capability; this means that the approximation of the resources of poverty, utilized to understand the ways in which urban poor households as well as the poor individual of the Latin American cities have dealt with poverty, is no longer theoretically and empirically viable.

The author argues that the capability of the households and individuals to attain certain levels of income and wellbeing is the consequence of complex social processes where the opportunities in labor market have a very important role; in such manner that the capability of action of the poor depends to a large extent on the development of social strategies and the availability of social policies that facilitate or restrict survival, social mobility and reproduction.

In Mexico, the economic conditions and the opportunities of labor market have deteriorated to such an extent that the mid-class households have become significantly poor and urban households have not developed real opportunities to have more incomes. The problem that the changes in labor markets have brought for poor households increases when we take into account that the salary income is fundamental for these households, for without these incomes their capacity to develop activities (self-employment, savings or production for the household consumption) that enable them to supply themselves is also eroded. In this context, the poor become poorer and have lower capability to maintain social relations of interchange and, thereby, their resources are impoverished. The perspective of the resources of poverty loses validity according to González de la Rocha (2001), to make room for the perspective of the poverty of resources.
From the times of the large migrations from the countryside to the city, in Mexico the marginalized have used familial networks as a way to arrive and enter into the recipient community (Balán et al., 1977: 194; González Beltrán, 2002: 81). Although the nuclear family is the constant (Ribeiro, 1990; González Beltrán, 2002; Cámara, 2002), the relations with other relatives (siblings-in-law, children-in-law, cousins, uncles and aunts, brothers) are very important in the domestic strategies, by means of personal loans with no fixed installments, in-kind borrows or the interchange of labor force for tasks such as building.

The last study on communities in poverty and extreme poverty in the Monterrey area (López, 2002) shows that most of their members work in non-specialized trades in commerce or services: street sellers, domestic maids, janitors, clerical posts, general helpers, sweepers, day laborers, and deliverers; activities that do not require specialization or determinate schooling levels. According to González Beltrán (2002: 84), in most of the cases it is the father the one with the most contributions to family support, nonetheless the children and wife help in the familial economy washing or sewing clothing, preparing food for selling, for instance. Besides, they gather reject materials such as glass, paper, tin cans or copper, which the sell by the kilo.

Other categories have to do with decreasing the quality of the food they eat or buying second-hand clothes from the U.S.; moreover, they may acquire food through the lending system called “el cartón” in the corner shops; buying goods in weekly installments is the only option to buy appliances, in spite the price grows twice or thrice. Likewise, they can resort to tandas* in which relatives and close friends take part.

Other strategies such as pawn shops and selling jewelry, or in-kind payments from the bosses are distinguished by Garrido de la Calleja (1997) in the same neighborhoods of Escobedo. In his interviews with the members of these communities, the author found that saving, for the poor and the extremely poor, means “keeping the incomes to maintain the family subsistence, in views of making it last until the next weekend, when they receive a new income” (Garrido de la Calleja, 1997: 89).

As I mentioned some paragraphs before, in MAM, detailed studies on the domestic strategies are almost inexistent; it is because of this that the works here cited did not have referents comparable in time or for other sectors of the same area. Notwithstanding, the researches coordinated by López are good precedent which now demonstrate that some marginalized zones in MAM are still inhabited by migrants.

*regular money collections which work as savings.
The social context of poverty in Monterrey

As I have mentioned, the studies on poverty in Monterrey are rather scarce; speaking of poverty in the second industrial pole in the country and the third city in terms of population seems to be something irrelevant at first sight, since this zone has overcome many havoc of development, unlike other zones of the country. Nonetheless, the degrees of inequality, demographic growth, the urbanization processes, the social and political complexity of the city, as well as its central role in the current processes of change at national and international level must be an attention calling for the study of poverty in the zone.

As we do so, we must not leave aside a fundamental aspect related to the culture and ideology linked to the characteristic development process of the zone. What does being poor in Monterrey mean? What differences a poor individual or community of Monterrey from those of other regions in the country? The study by Zúñiga and Contreras (1998) may help answer these questions; for these authors, “poverty as a statistical, economic or political category is inextricably linked to poverty as a social category, this is to say, how a society tends to conceive it”. In this sense, the social idea of poverty may appear as “a problem, a shame, a paradox or an evil systematically produced by a society that—as stated—does not work totally well” (Zúñiga and Contreras, 1998: 66).

In Monterrey, poverty seems to be absent from social reality (which is utterly different from really being); this apparent absence has to do with, on the one side, with social ideas which the individuals assume inside a “market of opinions” related to history and regional contexts (Zúñiga and Contreras, 1998: 76), and on the other side, with a local symptom, with the social way of looking at poverty. The authors affirm that liberal-Porfirista beliefs prevail in Monterrey, according to which social facts have a social origin. “This makes poverty be perceived as a product not of an ‘unfair social order’, of the economy limits or the ‘nature of things’ but of individual decisions, vices or defects”. At the same time, wealth is defined by opposed individual features: “fruit of tenacity, virtue and personal qualities” (Zúñiga and Contreras, 1998: 69). The researchers state this from their findings in an opinion survey developed in 1992, taking MAM as the universe under study.

In their study they found that half of the inhabitants of MAM considers the poor are poor because there are lazy and do not want to cease being so. Most of the interviewees consider that the State has a central role in the economic development of the country and has to consider help the poor, yet it is not its main role, for there are other more pressing problems to deal with. Hence, “public funds must be mainly used to support economic progress and not to alleviate the problems of the poor” (Zúñiga and Contreras, 1998: 80). For the authors, these
opinions demonstrate an “ideological congruence” with the traditional historic and social ideas in the region.

All of the above must be warned in order to think of the social and political limits and impacts which may appear when studying poverty in Monterrey.

**Conclusion**

The efforts in the study of poverty must try not only to measure its extension and change (by means of methods such as that of ‘poverty line’), but also to evaluate the state action so that punctual proposals are presented. The literature on poverty in Monterrey has scarcely referred to public policies, their impact, efficiency and pertinence. Only López (2002: 24) has pointed at the little incidence that policies have to solve the problems of the poor in MAM; this author proposes, and I do as well with him, “to reconsider a social intervention that sets local and regional actions in motion, adjusted to the specificity of municipalities and secure the survival strategies of poor communities, approaching solutions derived from actual needs”. This is something that not only involves state action, but also of those with possibilities to bring to light the specific features of poverty in Monterrey.

One of the alternatives is to evaluate and diagnose; but nonetheless the beneficiaries of governmental programs must be followed in order to find the relation which said programs have with the way of life of the poor and the role really played by their domestic or communal strategies.

Governmental help is only a part of the mechanisms used by the poor to survive; because of this, other resources should be analyzed, among them labor. It is necessary to learn which the conditions of the labor market in the zone are, and how they are a factor for the poor to remain in poverty.

If, as I have stated in previous paragraphs, the strategies are important to evaluate urban poverty; and if the conditions of labor are changing due to the processes of restructuring, then the study of the family, the household and life and domestic cycles must be taken into account, mainly in their relation with formal and non-formal labor; informality, by the way, remains absent from the literature on poverty in Monterrey. This is noteworthy, mainly if we take into account that scholars as Escobar (1996: 550) warn on the importance of articulation between the State, the capitalist economy (formal) and informal labor.5

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5 Equally important is to answer the question on the changes produced by the adjustments and restructuring in the levels of poverty and patterns of income distribution. Escobar (1996: 559) mentions that the restructuring firstly affects the poor in the city and then those in the countryside.
Griffin and Khan (1978: 298) insist that labor force which remains sub-employed or in informal employment not only carries out tasks of very low productivity, but also suffers from poor motivations, bad health and pressure from injustice because of its vulnerability. One is at risk of leaving these elements aside when the informality or sub-employment indexes are only measured using statistical methods.

As it may be guessed, it is necessary to complement qualitative and quantitative studies; it is true that the latter help understand better the changes in the levels of poverty, but mainly they favor the study of the economic structure as a framework that yields perspectives on efficiency and pertinence of certain actions to follow in poverty alleviation.

The only structure to study is not the economic one; political power must be accounted for. In their study on poverty in ten regions of high inequality in Asia, Griffin and Khan (1978: 300) found that in all of the cases a close relation between groups that hold political power and those who have most of the wealth, among which emerge technicians, administrators and governors. Although it is not his intention, Cerutti (2000: 229) shows how the surnames of the actionists of the main enterprises in Monterrey coincide with those that compose the political class of the state of Nuevo León, so we can presume similitude with the Asian cases.

The political structure does not only comprise the elite; as in the times of the large invasions, currently the poor have clientelist relations with one of the main political parties of the state, PRI. For the poor in Monterrey, the access to land tenancy, housing or right to a labor post, even if it is in informality, in many cases depends on this sort of links. Clientelist partisan relations are perhaps a much more important capital than the received benefits; hence, the relevance to carry out studies in this respect.

The relation between migration to MAM and poverty is another pending aspect for the study of poverty in the zone; how do migrants enter into the economy, society and politics in Monterrey? How much does the capitalist economy in Monterrey take advantage from bricklayers, street sellers, domestic maidens and sub-employed people? How does migration impact on urban growth? And on the other side, which social attitude receives the foreigners?

As I mentioned the studies coordinated by López in two sectors in poverty and extreme poverty in MAM, it was found that a large part of their inhabitants are still migrants. However, we lack studies on other zones of the area to be able to make comparisons and outline perspectives. Although distant, those migratory waves transcendental in the process of urbanization in Monterrey must not be left aside; then questions appear in the sense of the relation the population in Monterrey has with regions such as San Luis Potosí, Tamaulipas, Coahuila or Zacatecas, and which their relevance in the social and economic conformation of the region is.
International migration has to be taken into account as well. MAM has become an ejecting zone, so studies on the impact of this phenomenon on the economy and society in Monterrey are necessary. In this respect, there is only one study that shows that international migration has been used as a strategy by many people from Monterrey at the times of the crisis in the industry.\footnote{In this respect, see Hernández (2000); on the social networks between Monterrey and Houston, see Sandoval (2002).}

Finally, in order to respond to the needs of the study of poverty in the zone, the creation of institutional infrastructure that allows the development of researches which provide elements to compare in space and time. In parallel, said research processes must consider communication and diffusion that allow innovation in poverty alleviation. Without institutional (academic, governmental) support, the studies will barely surpass the line of gross data, lack of coordination and the absence of proposals, as it has been thus far.

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