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Stratification Economics in the Land of Persistent Inequalities¹

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Abstract

Stratification economics has emerged as a field that puts historically and institutionally determined intergroup hierarchies at the forefront of distributive analysis. However, most of the existing theoretical and empirical literature has focused on studying the US stratification regime, limiting the potential application of this analytical framework to other geographies. This paper applies the theoretical framework of stratification economics to analyze the Mexican distributive regime. In the process, we show that expanding the regional focus of stratification economics requires incorporating several insights from other traditions of stratification analysis. Furthermore, we show that a stratification economics approach overcomes several pitfalls of more traditional approaches to analyzing the Mexican distributive regime, such as the human capital approach that anchored several public policy interventions deployed at the beginning of the XXIst century.

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I.- Introduction

Mainstream economic interpretations about income distribution in society posit differences in productivity as the main explanatory factor of the observed inequality levels. As a result, this interpretation focuses on the distribution of human capital in society, as it assumes that a person's productivity is directly linked to the amount of human capital the person has. In other words, mainstream interpretations of income inequality assume that income distribution reflects the distribution of human capital. In this paper, we argue that explaining the magnitude and dynamics of the distribution of economic resources in any society requires complementing the insights from human capital theory with those of social stratification theory.

More explicitly, we argue that the limited role that human capital theory assigns to structural and institutional elements in explaining differences in access to the components of human capital and the returns assigned to them across societal groups curtails its explanatory power, making it incapable of explaining labor income dynamics and, more acutely, those of total income in market economies. We argue that these shortcomings can be resolved by embedding human capital theory into a broader analysis based on the insights from social stratification theory. As social stratification theory focuses on analyzing the institutional mechanisms that produce and sustain group classifications and differences in the allocation of resources among these groups, it can highlight how affiliation to a particular group can lead to a different return to a person's human capital, as well as to explaining the differences in access to human capital across social groups. Moreover, it allows us to broaden the scope of analysis to include other determinants of income distribution besides those related to the labor market, the realm to which human capital theory is most concerned.

We exemplify the potential of this integration through a reinterpretation of the literature on economic inequalities in Mexico during the XXIst century. This reinterpretation focuses on how social structures and institutions stratify access to the different components of human capital and how they are valued in the labor market. Thus our contributions are twofold. Firstly, we highlight how emphasizing stratification processes can complement human capital theory when explaining distributional dynamics in societies with persistent inequalities. Secondly, we provide the first interpretation of economic inequality in Mexico during the XXIst century from this lens of analysis.

Our paper is part of the literature on the recent field of stratification economics that seeks to incorporate insights from social stratification theory into economic analysis. As Darity Jr. (2022) explained, stratification economics is an analytical framework that analyzes the role of institutionally and historically determined group hierarchies in determining societal distributive outcomes. Instead of focusing on the individual in isolation as in traditional neoclassical economics, stratification economics emphasizes each person's membership to a particular group and how this membership opens or closes the access to specific rewards. It is worth noting that from the perspective of stratification economics, the initial membership to a particular group is not a conscious election of the individual. Instead, the individual is "assigned" to a particular group by society depending on the set of circumstances a person is born into.⁴

The recent paper by Bleynat and Segal (2021) shares our goal of integrating the insights from stratification theory with those from economics to explain the distributive dynamics in the Latin American context. Bleynat and Segal (2021) propose a multidimensional approach to the study of inequality in which the differences in life experience across the distribution of economic resources are considered. This implies integrating relational concerns into understanding the distribution of economic resources and how they shape and constrain a person's agency. Segal (2022) extends this effort to the realm of inequality measurement theory by providing a reinterpretation of several inequality measures such that they can be understood as showing the dynamics of inter-group inequalities and the effects of changes in social hierarchies. We see the present paper as a complement to theirs because their methodological approach is entirely consistent with the theoretical integration we develop in this paper. Moreover, we see our contribution as a bridge between the nascent literature on stratification economics and the more traditional analytical approaches in Bleynat and Segal's (2021) paper.

⁴ Following the tradition of inequality of opportunity studies in economics, circumstances are defined as the elements outside the control of the individual that affect the access to advantages (outcomes) of the person (Roemer, 1998). In that sense, the groups considered by stratification economics are equivalent to the "types" of the literature on inequality of opportunity (Ferreira and Gignoux, 2011). In that literature, a "type" is a subset of members of society that shares the same set of circumstances. The difference is that in the inequality of opportunity literature, there is no consideration of how the circumstances became relevant in terms of the assignation of rewards, while stratification economics takes this as one of the main preoccupations in its research agenda.

In the next section, we will discuss the main characteristics of the stratification economics framework, pointing to some of its limitations when applied to the analysis of Latin American countries and how these limitations can be overcome.

II.- Stratification Economics and Stratification Theory

Stratification economics puts at the center of economic analysis the existence of positional concerns shaped by a person's adscription to particular categorical social identities located at different strata of the social hierarchy of access to economic resources (Darity Jr, 2022; Davis, 2015). Under this framework, a person's economic decisions are aimed at preserving or increasing their economic status, which is contingent on that of their social group and satisfying their preferences. Following Veblen (1899), stratification economics poses that individuals will make investments to express their relative rank with respect to the rest and guarantee their persistence at that position or move upwards in the social hierarchy. Again, as Darity (2022) explains, these investments can be seen at the micro and macro levels. At the individual level, they correspond to the consumption of positional goods or services, as the growing literature on positional concerns documented⁵. At the group level, they correspond to the formal and informal institutions that produce intergenerational rank persistence, as Lewis (1985) explained⁶. In this macro sense, the literature on stratification economics connects with the existing literature on social stratification, dedicated to the analysis of the formal and informal institutions that groups at higher strata deploy to preserve their status and restrict the changes in the social hierarchy (see, for instance, Bourdieu, (1987,1996) and Tilly, (2000))

Stratification economics departs from other traditions in the analysis of social stratification by emphasizing that membership to a specific social group occurs through adopting group-specific norms in constructing a person's identity (Davis, 2015). The set of immutable

⁵ See Chapter 1 of Monroy-Gómez-Franco (2022) for a review of the literature.

⁶ Discriminatory practices, defined as practices that deny equal treatment or result in distinct outcomes for social groups with different attributes or identity traits, can be seen as informal institutions deployed by the dominant groups to assert their position over the subordinate ones (Rodríguez Zepeda, 2013). They operate at both the individual (as individuals perform them to reassert their position with respect to others) and at the group level. The latter is clear as for discrimination to persist and reproduce, it resorts to a series of symbolic devices -such as stereotypes or prejudices- that make it possible to legitimize the differential treatment of individuals and groups. Such devices become institutionalized by operating, more or less explicitly, as criteria for social norms, policies, or interventions that, consciously or unconsciously, reproduce the advantages of dominant groups or fail to correct the damage accumulated by historical discrimination (Solís, 2017).

characteristics with which a person is endowed at birth determines the set of possible social groups to which they can join by adopting specific social norms attached to them. Given the relational character of the social groups, persons are faced with the tradeoff between constructing their identity by adopting the norms of the groups that would allow them to reach a higher position on the social scale or those of the group to which they are more similar, provided the second will accept them more thoroughly than the first (Davis, 2015; Chelwa, Hamilton, and Stewart, 2022).

The hierarchization of the different social groups and, thus, the formation of a particular social stratification structure depends on the distribution of economic and political power across groups (Weber, 2012 [1922] ; Robinson, 2010). Groups at the top of those distributions can establish formal and informal institutions that order access to economic resources, establishing a preference for the in-group members and an ordering among the members of the other groups (Tilly, 2000). As a result, the characteristics that form the basis of different categorical identities are also mapped into a hierarchical order. In other words, some characteristics are deemed to be more socially desirable than others, creating an association between these characteristics and access (or the lack thereof) to economic resources.

We employ this framework to provide a reinterpretation of the existing empirical evidence regarding the distribution of economic resources in Mexican society. As a basis, we consider the social categories defined by gender, skin tone, ethnicity, and economic origin and their intersections. In contrast with explanations based on an individualistic approach, we show that the access to the variable considered key to moving across social strata -human capital- heavily depends on the social group to which a person belongs.

In this sense, our work is similar to the work by Darity (2022) for the US and Obeng-Odoom (2020) for South Africa. As them, we start from a stratification lens to interpret the distributive regime of Mexican society, using a similar set of social categories as a starting point to parse the Mexican stratification system. However, given the different historical developments of the societies analyzed, the emphasis across categories differs between our work and theirs. Specifically, our analysis puts more attention to the category of economic origin and

disaggregates between skin color and ethnic origin, as the formation of racial identities in the Mexican case is substantially different from that of the US and South African societies⁷.

In the following sections of the paper, we will take our analytical framework to provide an integrated explanation of the Mexican stratification regime during the XXIst century. Latin America's first two decades of the XXIst century are marked by the emergence of political projects with left and center-left platforms that placed economic and social inequality at the center of government agendas, marking the beginning of a so-called "post-neoliberal era." In Mexico, the period from 2000 to 2020 was characterized by political alternation between three parties with different political orientations that recently took a turn to the left.

Economically, during the period, the region saw significant changes regarding labor and social welfare, accompanied by the expansions of educational and health coverage and public transfers to vulnerable groups. Although Latin America reached the new millennium with lower levels of poverty and more favorable education, health, and housing conditions, inequality was accentuated as a result of economic expansion (Kessler, 2014; Kessler and Benza, 2020; ECLAC, 2021) and the concentration of income in political and economic elites (Reygadas, 2008). Mexico is representative of these trends and, thus, a suitable analysis under our proposed amendment to the stratification economics framework.

III.- Setting the context: The evolution of income distribution in Mexico

Throughout its independent history, Mexico has been a country where income has remained highly concentrated among relatively few individuals. Instead of an inverted U-shape suggested by the traditional Kuznetian interpretation of the relationship between economic growth and income distribution (Kuznets, 1955), in the Mexican case, inequality remained substantially high before, during, and after the process of structural change experienced by the economy in the XXth century (Arroyo-Abad and Astorga-Junquera, 2017; Castañeda-Garza and Bengtsson, 2020; Bleyntat, Challú, and Segal, 2021)⁸. The persistence of income inequality around high levels of inequality in the distribution of income in the face of changes in the country's economic structure suggests that these changes occurred without radically

⁷ For the particularities of this process, see Saldivar (2014).

⁸ It is worth mentioning that the cited papers present diverging evidence with respect to the short run dynamics of the distribution of income, they coincide in the finding that the income distribution in Mexico does not follow the Kuznetian dynamic, and instead, fluctuates around a persistently high level.

altering the stratification regime of Mexican society in terms of the gaps between the different strata of the social hierarchy.

This pattern did not change with the coming of the new millennium. On the contrary, the literature that corrects the underestimation of capital income in household surveys has identified that the distribution of total income in Mexico during the XXIst century remains very unequal⁹. Although the point estimates vary depending on the correction methodology employed, the Gini coefficient for total income in Mexico during the first two decades of the XXIst century remained between 65 and 70 points (Del Castillo-Negrete-Rovira, 2017a; Bustos and Leyva; 2017; De Rosa, Flores, and Morgan; 2020). This represents a gap of 10 and 15 points concerning the raw data in the survey.

The reason for such a large gap lies in the degree of concentration of capital income among the top income earners of the distribution (Ranaldi, 2021) together with the dynamics of the factor income distribution (Samaniego, 2017; Ibarra and Ros, 2019). In aggregate terms, the share of total value added in the Mexican economy paid as retribution to capital represents about two-thirds of the total product in the economy per year. Moreover, this share increased constantly through the first two decades of the XXIst century. Both factors can be partially explained by the high concentration of productive capital in a small share of firms and the high concentration of financial assets in the Mexican stock market (Del Castillo Negrete Rovira, 2017b). It is worth mentioning that while this increasing trend has been observed worldwide, in most developed economies, the capital income share ranges between 40% and 30% of total income, the reverse from the levels observed in Mexico (Francese and Mula-Granados, 2015).

Although capital income concentration is one of the main drivers of total income inequality in the country, the data sources available to study its distribution at the personal level and its more detailed characteristics, such as type of capital, sector, and access to it by different social groups remain scarce or non-existent. For this reason, throughout the rest of the paper, we will focus on labor income, as it is the income source for which more information and research are available. This lack of information regarding capital income can also explain why the

⁹ On the different problems present in household income surveys and the different correction methods in general we point the reader to the review by Lustig (2020). For the particularities of the Mexican case, we recommend the survey by Cortés and Vargas, (2017).

existing research on income inequality has adopted some version of human capital theory¹⁰, as it is a framework that situates the labor market as the center of the distribution of resources.¹¹

Furthermore, an implication of the large concentration of capital income at the top of the distribution is that most of the Mexican population relies almost exclusively on their labor income (Ranaldi, 2021). Thus, explaining the dynamics of labor income is relevant to understand the dynamics of the income of most of the Mexican population. The literature concerned with this subject finds that during the first half of the first decade of the XXIst century, the inequality in the distribution of this type of income decreased. However, this trend was transitory, and by the mid of the second decade of the century, labor income inequality was at the level observed by the end of the nineties (Campos-Vázquez and Lustig, 2019)¹². The traditional explanation for this dynamic lies in the change in the composition of the Mexican labor force, which saw an increase in the relative supply of highly educated workers. Consequently, the wage premia obtained from high school and college education fell, which propelled the reduction in inequality from 2000 to 2006. However, after the Global Financial crisis, although the wage premium kept falling, the labor income at the bottom of the distribution fell more than proportionally, increasing inequality (Campos-Vázquez, Lustig, and Scott, 2021). However, this does not explain why such fluctuations occurred around a persistently high level of inequality.

From the perspective of human capital theory, the large degree of inequality in the distribution of labor income is the fruit of large differences in productivity across individuals, originating from differences in the stock of each person's human capital. Those differences in human capital stocks arise either due to differences in preferences or due to constraints in access to human capital. The latter is usually associated with imperfect credit markets or rationing.

As can be seen, the human capital approach leads to a direct policy conclusion regarding tackling high levels of poverty and inequality: increase access and accumulation of human

¹⁰ See Becker (1964) for the classic formulation of the theory of human capital and Goldin and Katz (2018) for a more up-to-date explanation of income inequalities from the perspective of human capital theory.

¹¹ It is also worth mentioning that in the human capital theory framework, the distribution of capital income is either left unexplained and assumed exogenous, or characterized as the result of past decisions on human capital accumulation and savings, thus being a secondary result from the distribution of labor income.

¹² Going from a Gini coefficient of 0.50 in 2006 back to 0.55 in 2014.

capital (understood as health and education) such that disparities in human capital stocks only reflect differences in preferences. This was the guiding principle of the leading social policy in Mexico from 1997 to 2018: the conditional cash transfer program PROGRESA-OPORTUNIDADES-PROSPERA (Levy, 2006). However, as the persistence of inequality shows, the human capital story seems unable to capture the deep determinants behind Mexico's large and persistent inequality. We argue that to uncover the deep determinants of inequality in the country, it is necessary to shift focus from a proximate determinant, as is human capital, to the structures and institutions mediating access to it and its valuation by society. In other words, we argue that it is necessary to focus on the components of the Mexican stratification regime.

We do so in two steps. First, we focus on how the Mexican stratification regime distributes access to what economic theory considers the main components of "human capital": education and health. Next, we analyze how the Mexican stratification regime operates in the particular context of the labor market. In both cases, we consider the role played by three integral categories in the stratification regime: gender, ethnicity, skin tone, and economic position of origin.

IV.- The stratification of access to human capital

In everyday life, gender, economic position, ethnicity, and skin color are overlapping categories. Together, they form complex configurations that intensify advantages or disadvantages in the distribution of resources associated with human capital, such as education and health, therefore affecting the distribution of its rewards, mediated by participation in the labor market. Nowadays, the "classic" gender, race, and class inequalities intersect in spaces that form relatively new inequalities accentuated by the old categories (Grusky y Szelényi, 2011; Reygadas, 2010). For instance, this is the case of poor working women facing emergent processes of labor precarization that functionally merge with poverty and the burdens of reproductive work. With this in mind, we analyze the stratification in access to education and health in Mexico, relying on existing empirical evidence.

Access to education

The first step to analyzing the stratification in access to education is to highlight the existing gaps in the system. In the last 20 years, less than 5% of the population remained illiterate, and the share without formal education dropped from 10% to 5% among the population with 15 years or more. The low levels of illiteracy and no-engagement with the formal education system were achieved through the universalization of primary and lower secondary education and an expansion in upper secondary, which expanded from 16.6% in 2000 to 24% in 2020 (INEE, 2019). A similar process occurred in higher education, where the participation rate went from 10% to 20%¹³. Similarly, the educational lag¹⁴ decreased from 21% to 16% between 2008 and 2018 (CONEVAL, 2019)¹⁵. This information indicates that access to the formal educational system has become almost universal and that exclusion is not the norm. However, this rosy image is not representative of the experience of all Mexicans.

Consider, for example, the case of the indigenous populations, which represent nearly 13% of the total population. Even with the achievement of universal access to primary education and the gains in access to lower and upper secondary, these gains have not implied the full integration of the indigenous populations into the system. Consequently, they remain excluded from exercising their right to an education. Moreover, the educational lag of this population, although reduced over time (from 37.6% in 2008 to 31.1% in 2018), duplicates that of the non-indigenous population (20.1% and 15.4%, respectively) (CONEVAL, 2018a; INEE, 2019). This occurs even when the Mexican State has created intercultural and distance education models. However, the funding for these programs has remained insufficient to overcome the lack of physical and economic accessibility, the scarcity or inexistence of educational materials in native languages, and the lack of intercultural models for all mandatory school grades to prevent or discourage longer educational trajectories among the indigenous population.

In other words, education is a dimension where public provision covers most of the Mexican population, but the differentiation between indigenous and non-indigenous populations crosses such provision. Moreover, the universalization of access has not been sufficient to overcome

¹³ Estimates based on the 2000 and 2020 Population Censuses.

¹⁴ According to the official methodology for poverty measurement in México, educational lag exists when people of school age (3 to 21 years old) do not attend school or, if they are older, have not completed the level of education required by the regulations in force at the time they were of school age. (CONEVAL, 2018c).

¹⁵ Statistical annex of poverty measurement in Mexico.

the historical exclusion of indigenous populations. The same type of exclusion can be observed when considering the differentiation by the amount of economic resources a person has. For example, among the population living in extreme poverty, the school attendance rate goes from 77.5% for those between 12 and 14 to 48.4% between ages 15 and 17, according to the now-disbanded National Institute for the Evaluation of Education (2019). In 2010, four out of every ten people in the first income quintile attended upper secondary education, while in the highest quintile, the proportion rose to three out of every four. In 2018 the gap narrowed, but the difference was striking: five out of ten versus eight out of ten, correspondingly. In higher education, the trend is similar, but the gaps are even more significant and showed no reduction in the referred period: only 16% of the first quintile received higher education, while almost half of the wealthiest quintile did the same.¹⁶

It is worth emphasizing that these two dimensions intersect, as the exclusion of the indigenous population does not only occur in the educational dimension. For example, whereas 46% of the non-indigenous population has an income below the poverty line, 72% of the indigenous population is in the same situation. Thus, the attainment of educational capital among indigenous populations is affected by the effects of poverty and the institutional exclusion historically enforced against these populations by the undersupply of enough resources or deliberate linguistic exclusion. Although the indigenous poor suffer the combination of the exclusionary effects associated with the intersection of both categories, it is worth noting that the differences in educational progression associated with inequalities in the economic resources of origin affect a larger share of the Mexican population. In other words, for most Mexicans, either indigenous or non-indigenous, the economic resources of the household of origin are one of the main factors that explain how far they move along in the education system, even in a scenario where primary and secondary education is publicly provided and free of tuition.

The fact that the lack of economic resources is a determinant of educational participation reveals not only the critical role of poverty in human capital accumulation but also the role of educational institutions in the reproduction of inequalities. Although public education in Mexico is formally free, it involves travel, maintenance, or school activities costs that families with fewer resources cannot cover.

¹⁶ Data from the Social Rights Information System (SIDS) of the National Council for the Evaluation of Social Development Policy (CONEVAL).

Regarding gender, the data shows that Mexico has significantly reduced educational gaps related to women's attendance, permanence, and completion of school cycles. The distribution of school attendance at the primary level is practically equal between men and women, and women are the majority at the upper secondary and higher education levels (CONEVAL, 2018a). These gains are partly the result of policy interventions to boost human capital accumulation among women, such as the PROGRESA-OPORTUNIDADES-PROSPERA conditional cash transfer program¹⁷. The program aimed to do so by providing a larger transfer for girls than for boys who attended primary and secondary education.

However, the system remains partially blind to the specificities that shape a woman's educational experience. For example, teenage pregnancies have increased in recent years and represent one of the significant causes of school dropouts among female students (CONEVAL, 2018b). This occurs in a scenario where Mexico is already first in teenage pregnancies among OECD countries. Nevertheless, the educational system has so far remained unmoved in adjusting the provision of contraceptive methods or school program contents to the new situation. This highlights the limits of a public policy strategy aimed at increasing human capital accumulation without considering the specificities that membership to a particular social group, in this case, women, entails. Due to this system's inadequacy, women in poverty and members of indigenous communities accumulate the most extensive set of disadvantages regarding access to education and their educational trajectories.

Access to Health

From its origins nearly a century ago, public health care was divided between those with legally defined health rights, subjects of the State's assistance, and those without affiliation (Gómez and Frenk, 2019). Crucially, access to healthcare depends on the employment conditions of the person or those of the household's head. Therefore, public health care is marked by differentiated infrastructure, multiple sources of financing, different coverage packages, and the absence of a national health information system that brings together data from both the public and private sectors (Coneval, 2018b). The Mexican Institute of Social Security (IMSS) is at the system's center, covering subordinate workers registered by their employers and the

¹⁷ This program took charge of this function until 2020, when the current administration replaced it with various scholarship programs, without distinctions between men and women.

self-employed who opt to self-register in the institute. In total, the IMSS covers nearly 40% of the employed population. The rest of the population is covered through different institutions that provide healthcare to those lacking access through employment (Gonzalez and Scott, 2010; Ruelas, 2012). These suppletory systems have expanded aggressively in the XXIst century, bringing the share of Mexicans deprived of healthcare from four of every ten to one out of every six Mexicans.

Moreover, the system suffers from chronic underfunding, as only public health spending represents 5.5% of GDP, one of the lowest levels among OECD countries. As a consequence, the population has resorted to the use of private healthcare providers of heterogeneous quality. Two statistics show the magnitude of this substitution. First, since 2017 publicly funded health care represents half of the total health care expenditure in the country, well below the OECD average at 73%. Secondly, the country has the second-highest proportion of household out-of-pocket health expenditures, which accounted for an additional 41% of health spending (OECD, 2019).

To these inequalities embedded into the system due to its fragmented nature and its lack of resources, it is necessary to add the urban bias of the system as a whole. By 2018, 4.2 million people living in rural localities still lacked access to health services; although this figure is half of what it was in 2008, the challenge remains enormous. Likewise, the risk of dying from communicable diseases, malnutrition, or reproductive problems is 36% higher in the country's regions with the highest percentage of the population in poverty. Moreover, rural and indigenous populations in these regions usually represent a higher share of the total population (Soto, Moreno, and Pahua, 2016). These characteristics make the system ill-equipped to attend to the compounding effects of the Mexican stratification system over the most disadvantaged groups, such as the indigenous populations and workers who remain self-employed, which in the Mexican case is closely associated with lower wages.

The system operates in a context where, although Mexico has advanced in the demographic and epidemiological transition thanks to gradually improving health conditions¹⁸, the

¹⁸ The infant mortality rate dropped from 220 in 1992 to 12 per 1000 live births in 2015 (Soto and Pahua, 2016) and life expectancy has increased to reach 75 years in 2019. The national vaccination system has virtually universal coverage among children under one year of age (CONEVAL, 2018b) and morbidity and mortality from common infections, reproductive problems or malnutrition-related diseases have decreased considerably.

interaction between these two processes has given way to new health profiles. These new profiles are marked by population aging and the increase in chronic degenerative diseases such as diabetes, hypertension, ischemic heart disease, and malignant tumors, to which much of contemporary morbidity and mortality is attributed (OMENT, 2019; Mino-León et al., 2019; Soto, Moreno and Pahua, 2016).

On top of these general challenges in healthcare, several challenges are specific to women's health conditions in the country, which the system remains unable to tackle. Maternal mortality remains far above the target of 22 deaths by 2015 set in the Millenium Development Goals, as in 2018 the rate was 33 deaths related to pregnancy, childbirth, or puerperium occurred for every 100,000 live births (Argüello, 2020). The maternal mortality rate is higher in regions with lower economic development, among speakers of indigenous languages, and less access to institutions providing sexual and reproductive health services (Lazcano-Ponce et al., 2013). Moving to other illnesses that affect women, it is worth mentioning that cervical-uterine and breast cancer are the first and third leading causes of death among women between 30 and 59. Together with diabetes, which has doubled its lethality (from 42 deaths per 100 thousand inhabitants in 2000 to 86 in 2016) (Coneval, 2018b), they reflect the profile of a health system with difficulties in targeting prevention and developing a gender component.

Although there are still cultural factors related to gender inequality that limit women's sexual and reproductive healthcare -such as shame or the need for the husbands' permission to be examined-, limited public interventions with a cultural approach and gender perspective have gradually increased women's access to these services in rural and indigenous territories, and should therefore be strengthened.

The evidence reviewed above shows that access to what is considered the traditional components of "human capital," health and education, differs substantially depending if a person is a man or a woman, indigenous or non-indigenous, and her position in the distribution of economic resources of origin. In other words, it varies depending on the social group to which a person belongs. Moreover, the Mexican experience shows that even in the face of expanding access to public systems, if these processes do not consider the particularities that restrict the access of different groups to these basic components of human capital -i.e., the context-specific dynamics of sexism, racism or classism, among others-, the expansions will

still leave out historically disadvantaged groups. In other words, they cannot erase the effects of the hierarchy implicit in the Mexican stratification system.

In the next section, we analyze how the Mexican stratification system operates in the labor market and how its operation in that area of the economy compounds the effects already described.

V.- An unbalanced playing field: The Mexican Labor Market

A disparate entry door

Before presenting the Mexican labor market's general characteristics, discussing the conditions in which the partition into it occurs is worthwhile. First, a low female labor force participation rate is a persistent feature of the Mexican labor market. By 2019, 44.7% of all women over 15¹⁹ participated in the labor market, 7.7 percentage points below the Latin American average female labor force participation rate of 52.4% and among the lowest in the continent²⁰. Furthermore, it is worth mentioning that the female labor force participation rate was even lower before the 2008-2009 Global Financial Crisis and that the increase in educational attainment mainly explains its increase between 2007 and 2017 (López-Acevedo et al., 2020).

Existing evidence also suggests that long-run economic growth is associated with an upward trend in the female labor participation rate (Serrano et al., 2019). However, the evidence suggests a counter-cyclical behavior around this long-run upward trend. Namely, that female market work acts as a supplementary source of income during times of economic hardship and that it recedes as the situation improves (García, 2001; Pedrero-Nieto, 2003; Parker and Skoufias, 2004). This relationship and the gains associated with increases in educational attainment suggest that even the improvement of structural conditions (positive economic growth and educational expansion) is insufficient to increase the female labor participation rate to the Latin American average. Moreover, the counter-cyclical behavior suggests that society perceives the participation of working-age women in the labor market as an emergency

¹⁹ 15 years of age is the minimum required age to be legally employed in Mexico.

²⁰ Data from the World Development Indicators, World Bank.

measure to sustain households' livelihood and not something to be naturally expected for a woman to do.

The low labor force participation rate among women can be linked to the effect that traditional social norms on female autonomy have on the distribution of care work inside the household, as well as what is expected from a woman to do (Oliveira y Ariza, 2000; García and de Oliveira, 2004). Traditional social norms place almost exclusively on women's shoulders the performance of intra-household care work. As a result, society expects these tasks to be a woman's primary concern throughout her life, pushing concerns about an educational career and participation in the labor market to a secondary place. Unless a woman can displace this burden on another household member, namely another woman, the likelihood that she participates in the labor market diminishes (Anderson and Dimon, 1998; Gong and van Soest, 2002). This is particularly the case among women from low-income households, who increase their participation in the labor market in the face of an economic downturn.

It is important to consider that social norms acting on women's participation in paid and unpaid work are closely related to their economic and material contexts. For example, in Mexico, women living in poverty show lower levels of labor participation: in 2018, 47.4% of poor women over 15 years of age were engaged in some paid economic activity, while among non-poor women, the proportion rose to 55%. Moreover, the difference in labor participation of poor and non-poor women increases when we focus on central ages of reproductive and productive life (16-44 years): in 2018, 49% of poor women in these ages were working, while among non-poor women of the same age, the percentage rose to 61.3%.²¹

Motherhood has decreased its weight as a defining element in women's likelihood to work gainfully. In 2018, the female labor participation rate was 51.9% for women with children and 52.4% for those without them, a scenario that ten years ago still showed marked differences (42.1% and 49.8%, respectively, in 2008). The reduction comes from poor mothers facing the need to make economic contributions to their households while being in charge of domestic and care work since, unlike women with higher socioeconomic status, they cannot replace their work with market services. To reconcile workloads, women,

²¹ Data in this section correspond to the Poverty and Gender Information System of the National Council for the Evaluation of Social Development Policy (CONEVAL). Information 2008-2018. <https://www.coneval.org.mx/Medicion/MP/Paginas/Pobreza-y-genero-en-M%C3%A9xico.aspx>

especially in low-income strata, access more precarious jobs; in 2018, 52% of employed women in poverty worked part-time (31.4% among non-poor employed women), and only 20% had a contract (60% among non-poor female workers).

These results indicate that a woman's insertion in the labor market is constricted by the tasks that social norms and informal institutions put on her shoulders. In other words, the Mexican stratification system assigns women a subaltern role with respect to men. These informal institutions do not constrict all women in the same way, as they interact with the effects of the scarcity of economic resources and norms and institutions that enforce ethno-racial stratification.

The uneven playing field

The next step is to analyze the situation among those who can participate in the Mexican labor market. The Mexican labor market is one in which informal labor arrangements are present throughout a person's distinct positions in their workplace. For example, 44% of all subordinate workers²² are employed without access to health care and social security, which is against the legal framework. Similarly, 86% of all self-employed workers do not follow the mandatory accounting and internal administrative practices that formality requires them to do, and roughly the same proportion lacks access to social security. These conditions are heavily correlated with labor income, as workers in the first two quintiles are primarily in an informal employment arrangement, while those at the top are the likeliest to be in a formal work relationship (Monroy-Gómez-Franco, 2023).

Regarding income, labor income contracted due to the 2008-2009 Global Financial Crisis and did not recover its previous level until 2018 (Campos-Vázquez and Lustig, 2019). From 2016 onwards, the federal government adopted a policy of minimum wage increases, and the increments accelerated at the start of the new administration in 2018. The policy change implemented in 2018 included a different treatment between the north border and the rest of the country, where the municipalities in the north have experienced more aggressive annual

²² Subordinate workers represented 69% of the employed population in the first quarter of 2022. Similarly, self-employed workers represented 22% of total employment, while unpaid workers represented 4% and employers 5% of the total employed population—data from the National Survey of Occupation and Employment (ENOE) for the first quarter of 2022.

increments. Campos-Vázquez and Esquivel (forthcoming) show that although the new policy diminished the transitions into poverty in the northern border, in the aggregate, the population with a labor income per capita below the extreme poverty line has remained constant.

These dynamics, together with the fall of the educational wage premium described previously, suggest a general environment of deterioration in the conditions of the labor market. The decline of the wage premia to upper education is associated with reducing the educational gap between men and women. This implies that although the educational capital stock of men and women equalized, the level of returns obtained by women who increased their educational attainment was lower than the preexisting one. Even when the gap between men and women in labor income terms was closing, the closure occurred in the context of a general precarization of the labor market.

However, the precarity of the Mexican labor market does not affect everyone in the same way. There is growing evidence that the hiring processes in the Mexican labor market evaluate characteristics that are non-related to a person's performance on the job. Audit studies by Arceo-Gómez and Campos-Vázquez (2014*b*, 2019) show that darker-skinned women receive fewer callbacks from possible employers than their light-skinned peers, even when the candidates have the same work experience and formal qualifications. In a similar audit study focusing on physical appearance and weight, Campos-Vázquez and González (2020) find that women are also penalized in the callbacks they receive if they are overweight.

The stratification regime also affects the rewards available to the members of the different groups in society. In the case of women, the evidence suggests that the labor income gap experienced by women with respect to men of similar qualifications corresponded to 9% of the total labor income (Mendoza González, Cardero García y Ortiz García, 2017). However, this does not consider the effect mentioned in the previous paragraphs of the stratification process on labor force participation. Once this effect is considered, the gap more than doubles to 20% of labor income (Arceo-Gómez y Campos-Vázquez, 2014*a*). As in the case of the differences in job access, the wage gap is partially explained by the informal institutions that police female bodies. Those informal institutions penalized specific characteristics in women but not in men. This is the case of body weight (Campos-Vázquez and Núñez, 2019) and maternity (Aguilar-Gómez, Arceo-Gómez and de la Cruz Toledo, 2022). In terms of occupational segregation, both Calónico and Ñopo (2009) and Orraca, Cabrera, and Iriarte (2016) identify systematic

differences in the occupations performed by men and women in Mexico. Both also identify that the difference in the returns to observed characteristics within the same occupation plays a significant role in explaining the wage gap. In other words, the wage gap is not only associated with differences in how society values effort but also accessibility to the components of human capital. However, even when access to human capital resources exists for members of different social categories, the order of each category in the social hierarchy still has the final word regarding the distribution of its rewards.

As in the case of callbacks by employers, the stratification regime based on skin tones also affects the income received from labor. Campos-Vázquez and Medina-Cortina (2019) and Reeskens and Velasco-Aguilar (2021) find the existence of an earnings premium for whiter skin tones even after controlling for several covariates related to work productivity. In other words, on average, the stratification regime puts a higher value on the effort of light-skinned persons than that of the rest of the workers. In the case of occupational segregation, however, the evidence is less clear. Villarreal (2010) identifies evidence of a systematic concentration of dark-skinned workers at the lowest strata of the occupational distribution, but Flores and Telles (2012) find that this concentration is related more to the economic origin of the workers. Both provide evidence of the interlocking of both stratification processes: the one based on economic origin and the one based on ethnic origins.

In terms of ethnic origin, a robust finding in the literature is the existence of an earnings penalty against indigenous people. The different decomposition analyses on this penalty indicate that 40% of it cannot be accrued due to the difference in observable characteristics (Cano-Urbina and Mason, 2016; Aguilar-Rodríguez, Miranda, and Zhu, 2018; Canedo, 2019). Furthermore, a recent analysis by Arceo-Gómez and Torres (2021) shows that this penalization is associated with the person's self-identification as a member of an indigenous group, not speaking a second language.

The long-run effects of the different axes of stratification are observable in how the rank position in the distribution of economic resources is transmitted from one generation to the next. Campos-Vázquez, Delgado-Barrera, and Vélez-Grajales (2020) and Daza-Baez (2021) find that intergenerational transmission of earnings inequality is substantial in Mexico, ranging between 50%-70% of the inequality being transmitted between generations. Vélez-Grajales and Monroy-Gómez-Franco (2017) and Monroy-Gómez-Franco (forthcoming) show a high

degree of intergenerational transmission of the rank occupied in the distribution of economic resources. However, they show that the position transmitted differs systematically by skin tone and ethnic origin of the person. Both Vélez-Grajales and Monroy-Gómez-Franco (2017) and Monroy-Gómez-Franco (forthcoming) show that light skin tones remained at a higher position of the distribution compared to the rest of the distribution, while Monroy-Gómez-Franco (forthcoming) shows that non-indigenous groups remain at a higher position than indigenous groups, regardless of their skin tone. This evidence suggests that the effects of the Mexican stratification system are transmitted from one generation to the next through the mechanisms that produce such a high-rank persistence rate in economic resources.

The results above show how the labor market is not free from the effects of the Mexican stratification system and how its implicit hierarchies are enforced by penalizing certain groups in society for their immutable characteristics. Moreover, this penalization occurs upon the already differentiated chances to accumulate the components of human capital. In other words, to calculate the total effect of the Mexican stratification regime, it is necessary to consider both the direct effects that occur in the labor market and the cumulative effects on the accumulation of education and health. This implies recognizing that an exclusive focus on the dynamics of the labor market can only explain, at best, the short-run behavior of the distribution of economic resources in a society. Instead, it is necessary to consider the institutional determinants of the social distributional arrangement to explain the long-run behavior of inequality and, thus, the level at which the short-run variations occur. The processes of social stratification are the expression of this social distributional arrangement, as they restrict the access of different social groups, first, to specific resources and, second, to specific sets of rewards associated with such resources.

In this sense, the relationship between social and economic stratification not only exists but is close and reciprocal; it is not necessarily about the subordination of one hierarchy to another but the circular feedback between the two in an environment that sanctions certain attributes at least twice: first, in the possibility of developing certain capabilities, and then in the retribution for the deployment of those capabilities.

The implications of this discussion are critical in interpreting the economic performance of each member of the Mexican population and show the importance of adopting a stratification lens for the analysis of inequalities in Latin America. Such a lens puts at the forefront the role

of formal and informal institutions in the distribution of opportunities, advantages, and rewards across groups of society. In the Mexican case, such institutions put light-skin tonalities at the top of the social hierarchy, a non-indigenous origin, a high rank in the distribution of economic resources of origin, and being a man. For this group, the accumulation of human capital and its valuation occur in more favorable conditions than the rest. The emphasis on the hierarchy and the gaps among its echelons shows why income inequality persists at such high levels throughout Mexican history, even in the face of significant technological, economic, and social changes.

Some of these transformations result from public interventions deliberately seeking to reduce inequality gaps in access to relevant resources such as education and health²³. Many of these efforts have identified women, youth, the elderly, the indigenous population, and people living in poverty as socially excluded and discriminated groups that require compensatory or affirmative actions. Although these actions are important, their impact on the reduction of structural inequality is and will continue to be marginal if the labor market, where investment in human capital and effort are expected to bear fruit, continues to be deeply segmented, heavily oriented to informality, and organized by discriminatory criteria that penalize historically devalued social categories.

For this to change, in addition to introducing wage improvements and creating regulations that explicitly sanction discrimination on any grounds, it is necessary to promote formality and, in parallel, consolidate the creation of a social protection system independent of occupational status.

VI.- Future avenues of research

The rationality of the distribution of socially valued resources has never been neutral nor coupled with perfect markets. Instead, its logic passes through the sieve of culture and its multiple devices of valuation, classification, and hierarchization. As a result, social processes of differentiation affect access to opportunities for well-being and development beyond the capabilities and control of individuals. It is not that their attributes, capabilities, and efforts are

²³ As the aforementioned Progres-a-Oportunidades-Prospera program or the cash transfer programs for students, working mothers, people with disabilities living in poverty, among other interventions of the current administration.

not important, but they do not operate in a vacuum. On the contrary, they are categories that acquire meaning within the framework of power relations that operates through personal interactions and institutional processes that organize inequality.

Acknowledging this requires alternative theoretical frameworks and analytical tools for more comprehensive explanations of economic inequality. Analyzing the differences between personal trajectories in relational terms -instead of considering only individual attributes- is essential for several reasons. First, individual characteristics have a social origin; although they are biological traits, their meaning is socially and culturally constructed. Second, individual capabilities are deployed within interpersonal, institutional, and structural social relations. Third, only considering individual decisions and capabilities when analyzing inequality is tantamount to thinking that society is merely an aggregate of parts and not a structure with specific properties. Finally, the methodological individualism behind these approaches leaves out the analysis of inequality, processes of exploitation, and opportunity-hoarding, which are the primary mechanisms for the production of social and economic inequality.

In that sense, we seek to provide a reinterpretation of the empirical evidence on inequalities in Mexico that weaves the different findings into a coherent framework that can explain both the magnitude and the persistence of inequalities in the distribution of income and opportunities in Mexico. Such an explanation focuses on the role of formal and informal institutions in hierarchizing social groups as defined by the characteristics of their members. Such hierarchy is necessarily contingent on the history of a society. Thus, we argue that shifting the focus from the dynamics of the labor market in terms of the returns to education and health to the institutions that regulate the access to both education and health, their valuation, and those ordering the workings of the labor market yields a more fruitful approach to studying the distributional dynamics of persistently unequal societies.

Moreover, although we focus on integrating the literature on labor income dynamics in Mexico, we argue that this approach is helpful in understanding the distribution of all types of income and their dynamics. The focus on the human capital theory has diminished the capacity of economics to provide a coherent explanation of the distribution of income from sources different from labor. Because of this, we argue that taking a stratification approach to studying the distribution of all income sources can yield a fuller picture of the determinants of their distribution and their dynamic. In that sense, a clear avenue for future research is to use a

stratification approach to study the distribution of capital and land in Mexico in order to provide a complete picture of the distributive dynamics in Mexico.

Although we focus on the Mexican case in this paper, we argue that a stratification-guided approach can be fruitful in understanding the distributional dynamics of other societies with high and persistent inequalities. Thus, we argue that research on income distribution necessarily has to take an interdisciplinary approach, as a stratification focus demands a study of the institutions that underpin the stratification regime and their persistence through time. In that sense, we see a clear potential for interaction with the literature on inequality of opportunity that sprung from the work of Roemer (1998). The focus of the literature on inequality of opportunity is the identification of the relevant circumstances for the distribution of advantages in society. However, this literature does not analyze how personal characteristics are transformed by society into circumstances that affect a person's outcomes and the hierarchy among groups they generate. That, however, lies directly at the center of the objectives of stratification economics. In that sense, the present paper can be seen as an effort to understand how the circumstances found as relevant for the Mexican case by Vélez-Grajales, Monroy-Gómez-Franco, and Yalonzky (2018); Monroy-Gómez-Franco, Vélez-Grajales, and Yalonzky (2021) and Thibaut, Soloaga, and Torres, (2022) operate in different realms and why are they elements that construct a hierarchy among social groups in Mexico.

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