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Highlights

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Economic Contribution of Cultural Industries

Discovering Thoughts, Inventing Future

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The Causal Relationship between Value-Added Tax and Social Conflicts: Evidence from Mozambique

By Luciano S. Gule
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Abstract- This research examines the causal relationship between social conflicts and Value-Added Tax (VAT) in Mozambique. The study tests two hypotheses; the "tax-burden" hypothesis which is used to evaluate the long-run relationship, and the "tax-conflicts" hypothesis which estimates the short-run relationship between VAT and social conflicts. Vector Error Correction Model (VECM) is used to examine this relationship. The data used comprise the period from 1994 to 2018. The outcomes of the study suggest that the prices of goods and services included in the new VAT system had a causal relationship with social conflicts in the short-run in Mozambique; these results support the "tax-conflicts" hypothesis. Under this hypothesis, the unsustainable tax imbalances can be mitigated by exempting or reducing the VAT of some indispensable consumption goods and services. The VECM results of long-run causal relationships suggest a bidirectional causality between VAT and social conflicts, supporting the "tax-burden" hypothesis. Under this hypothesis our finding suggests that in the long-run Mozambique's central government should design a new VAT system; expand and diversify the sources of revenue.

Keywords: *vector error correction model, value-added tax, social conflicts, causality.*

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The Causal Relationship between Value-Added Tax and Social Conflicts: Evidence from Mozambique

Luciano S. Gule

Abstract- This research examines the causal relationship between social conflicts and Value-Added Tax (VAT) in Mozambique. The study tests two hypotheses; the "*tax-burden*" hypothesis which is used to evaluate the long-run relationship, and the "*tax-conflicts*" hypothesis which estimates the short-run relationship between VAT and social conflicts. Vector Error Correction Model (VECM) is used to examine this relationship. The data used comprise the period from 1994 to 2018. The outcomes of the study suggest that the prices of goods and services included in the new VAT system had a causal relationship with social conflicts in the short-run in Mozambique; these results support the "*tax-conflicts*" hypothesis. Under this hypothesis, the unsustainable tax imbalances can be mitigated by exempting or reducing the VAT of some indispensable consumption goods and services. The VECM results of long-run causal relationships suggest a bidirectional causality between VAT and social conflicts, supporting the *"tax-burden"* hypothesis. Under this hypothesis our finding suggests that in the long-run Mozambique's central government should design a new VAT system; expand and diversify the sources of revenue.

Keywords: vector error correction model, value-added tax, social conflicts, causality.

I. Introduction

Value-Added Tax (VAT) is considered one of the most important tools when it comes to the fiscal policy development of the last quarter of the twentieth century in many countries. It was first adopted in Europe, and subsequently, it quickly spread around the world. Many developing countries adopted VAT for many reasons, among them: budget deficit, the adhesion to the International Monetary Fund (IMF)[1], and for its simplicity. But one of the most argued reasons is related to budget deficits— phenomena observed when the government expenditure surpasses its revenue. This triggered many developing countries to start using VAT as a solution to their financial problems. Within a short time, VAT became a fashionable and important fiscal policy instrument. In fact, in these developing countries, VAT has been one of the most significant tax reforms (Bird and Zolt, 2005). Another reason that has led these countries to implement VAT is related to its characteristics. Palma (2015) affirms that the success of VAT is particularly associated with its generality and neutrality, which is obtained through its invoice and subtractive methods. These characteristics make VAT a simple tax to implement and collect.

Given that VAT can be implemented and collected without an organized tax structure, it gained much success in developing countries. For instance, in Mozambique, the new VAT system was introduced in 1999, influenced by the IMF policies toward developing countries, and as a measure to improve financial stability through the increase in internal revenue collection. However, as observed in past cases, the importation of policies without looking at the local reality, in most cases, tends to generate more problems than solutions. In this case, the new VAT system in Mozambique charged at 17 percent does not fit the Mozambican economic environment; indeed, it is a reproduction of the Portuguese VAT system with a minor change[2] and was designed for a political and socio-economic environment that is quite different from Mozambique; thus, new VAT system in Mozambique tends to be regressive rather than a progressive tax. A tax is "regressive" when low-income people pay a higher fraction of their income in taxes than wealthier (Faridy and Sarker, 2011). This influence has had a negative impact in many cases, focusing on indirect regressive taxation like VAT, and extensive tax incentives for companies" (Itriago, 2011).

For most of the Mozambican population, the new VAT system is a burden because they belong to low-income[3] group and they spend a large fraction of their income on the consumption of goods and services. As a result, the Mozambican new VAT system is a regressive tax. As stated above, for a regressive tax like VAT, the burden is highest for low-income households and falls sharply as household income rises (Tax Policy Center, 2020). When VAT is increased, two things happen. First, the prices of goods and services paid by the consumer increase (Toder et al., 2012), which tends to reduce household incomes. Second, the volume of business reduces (Toder et al., 2012), leading to a decrease in jobs. In the case of Mozambique, which is a

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[1] Oxfam states that, "The IMF and national elites have heavily influenced tax policy in developing countries (Intriago, 2011)

[2] VAT standard in Portugal is 23 percent standard to all good and service, with 13 and 6 percent reduced on certain essential goods and service, and Portugal had GDP per capita of U$23,462 in 2019, compared with Mozambique with 17 percent and no reduction and had GDP per capita of U$487 in 2019.

[3] 45 percent live below the poverty line, and approximately 80 percent of employment in Mozambique is in the informal sector (World Bank, 2019).

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small economy based on imports, the implementation of the new VAT system led to an increase in prices of goods and services and consequently to an increase in the cost of living, resulting in riots, demonstrations, protests, and strikes. In this research, these events are collectively referred to as social conflicts.

This study, inspired by the fact that after the implementation of the new VAT system there has been a constant rise in the number of social conflicts, and also any fluctuation in the prices of goods and services in the international markets directly affects the prices paid by the consumers in Mozambique, attempts to establish a causal relationship between VAT and social conflicts. To this end, I analyze the degree of social conflicts as measured by the number of participants in riots, demonstrations, protests, and strikes. I also evaluate the importance of VAT as a share of total revenue, and finally, I look at government expenditure as a total amount spent on capital investments. With the above in mind, I examine the causal relationships between VAT and social conflicts in the short- and long-run in Mozambique.

a) The Problem of the New VAT System in Mozambique

According to OECD et al., (2020), taxes on goods and services charged in African countries were the main source of tax revenue; in 2017, it was on average around 53.7 percent of total tax revenue, VAT contributed an average of 29.4 percent, making it the most significant tax on goods and services; also 18.6 percent of tax revenue came from corporate taxes and 15.4 percent recorded from individual taxes at the bottom were social insurance taxes with 8.1 percent and property taxes with 1.6 percent. The same case is in Mozambique, where VAT contributed an average of 70 percent of the tax on goods and services, which accounted for 36.8 percent of total revenue from 2000 to 2017.

The increase in the tax revenue seen in Mozambique at the beginning of the 21st century is due to the implementation of the new VAT system in 1999, which substituted the circulation tax of 5 percent for production and 10 percent retail. The new VAT system increased the economic obligations of the poor, who make up the majority of the population. Although the implementation of the new VAT system has brought many benefits and accelerated economic growth in Mozambique, it increased the level of economic inequalities and increased the price hike mainly in imported products[4].

[4] According to data obtained from United Nations Conference on Trade and Development When it comes to trade, for example, in 2014, Mozambique had a trade deficit of more than US$4 billion. In 2013, Mozambique imported more than twice of its exports in value. From 2007 to 2013, Mozambique's exports doubled from US$2.4 billion to US$4 billion, while imports grew faster, increasing from US$3 billion to US$10 billion.

In African countries, which rely on VAT as the main revenue source, VAT increases without policy adjustments tend to be accompanied by growing concern about its impact on low-income households. As the tax increases, general commodity prices also increase. This increase means that the low-income households, in particular, will tend to spend a significant portion of the income on consumption of goods and services, just as the business will have to increase the total price of goods and services to adjust to the VAT increase. This increase in costs can also be seen in all products affected by the VAT increase. Toder et al., (2012) state that "the increase in VAT can affect the total cost of goods and services consumed by citizens or it can decrease the volume of revenue from the companies; the author also found evidence that suggests that VAT can be passed to consumers through higher prices, where increases in VAT can increase the price of goods and services or reduce the family's real income" (Toder et al., 2012).

In Mozambique, a new VAT system is problematic because 45 percent of the population live below the poverty line, and approximately "80 percent of employment in Mozambique is in the informal sector" (World Bank, 2019); therefore, the new VAT system in Mozambique is unsustainable and does not reflect the reality of the country whose majority are low-income households. In this research, I point out that due to the lack of adequacy of the policy to the local reality, a new VAT system is a burden for low-income families that make up the majority of the population's "*tax burden hypothesis*". The Tax Policy Center (2020) affirms that "VAT is more proportional to income when measured as a share of income over a lifetime; because the income saved today is generally spent in the future, the survey also found that for a lifetime measure of income, the burden of VAT as a part of income is less for high-income families than for others because VAT does not tax returns on new capital investments" (Tax Policy Center, 2020).

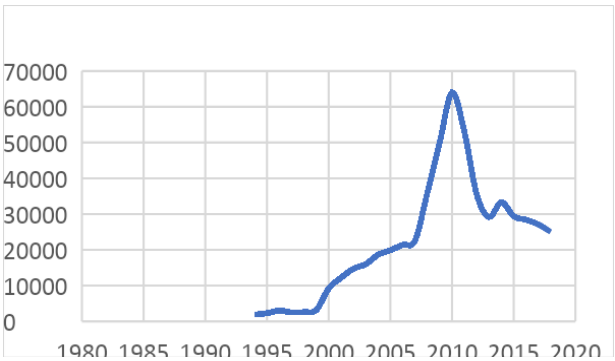

Figure 1: Social Conflicts Participation

As stated before, the Mozambican new VAT system evolved from a multiple-rate system formerly known as a circulation tax that was 5 percent for

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production and 10 percent retailers to a single rate of 17 percent, with a zero rate on exports., following the IMF's policy recommendation under its stabilization program to boost the State's income revenue and financial stability through the increase of internal revenue collection and bring transparency to its indirect tax system. However, the consequences are putting the country's economic growth and political stability at risk; since the adoption of the new VAT system, the level of social conflicts (Figure 1) in Mozambique due to the constant rise in prices of goods and services has been increasing. The critical point is that the new VAT rate is very high compared to the population's per capita income[5], which spends the largest share of income on consumption. The new VAT system in Mozambique is responsible for increasing the total cost of goods and services paid by households, the majority of whom are low-income. The persistent increase of prices of goods and services affected by the new VAT system in the short-run, in my viewpoint, is the main cause of the social conflicts in the last two decades, "*tax conflicts"* hypothesis and coincides with the tax reforms implemented. Therefore, it is reasonable to examine the causal relationship between VAT and social conflicts in Mozambique.

II. Literature Review

VAT has several benefits in developing countries. However, there is a long debate over the implementation of VAT in under-developed nations. Keen and Lockwood (2007) point out that VAT has worked as a "cash machine" because it helped many countries to make additional revenue that they could not get before the implementation of VAT Emran and Stiglitz write that VAT becomes complicated when implemented in a country with a huge informal economy; (Emran and Stiglitz 2005). Keen (2008) found out that VAT indirectly taxes the informal sector because certain products sold on the informal market are taxed VAT when imported. Boadway and Sato (2009) proposed that VAT advantages depend on several factors, such as the country's ability to tax individuals and companies; they also found that regressivity of VAT becomes a prominent feature particularly in low-income societies.

Bird and Zolt (2005) were more cynical about the impact of VAT on developing countries. They found that the VAT that most often replaced the border tax was much regressive than previous taxes. Boadway and Sato (2009) claimed that the tax reform policies that reduced tariffs and transferred the burden to VAT were undesirable from the point of view of impartiality.

Several studies investigating the consequences of the zero VAT rate found that the zero VAT rate was a better instrument than the tax exemption (Bovenberg, 1987; Gottfried, 1991). Analyzing the adverse effects of VAT in Vietnam, Giesecke and Nhi (2010) found that a uniform tax without exemptions increased the total consumption with adverse distributional consequences for low-income families; they also found that the adverse distributive effects of VAT could be expressly changed, at a small cost for the gain of collective.

Emini (2000) analyzed the introduction of a pure VAT system in Cameroon. He found that a pure VAT system tended to be more favorable than cascading taxes for economic activities that supported a substantial tax burden. Emini concluded that increasing tax revenue through expanding the tax base was better than increasing the VAT rate. Bahl and Bird (2008), concerning the impact of VAT on revenues, affirmed that until now, VAT is seen as an essential tool for a good tax system for increasing tax revenue in many countries, and one of the primary sources of revenue in many countries. However, Ebrill et al. (2002) found that "the rapid increase in VAT seen in many countries in the 20th century was the most dramatic - and perhaps the most important tax development phenomena in the last century. For the authors, the adoption of VAT by many countries was intended to increase state revenues, trade, and control persistent budget deficits. Many African countries affiliated to IMF who had budget problems saw VAT as the optimal and straightforward solution to boost their tax revenue collection; this was the case with Kenya, South Africa, Nigeria, Botswana, and Mozambique.

A study conducted by Alemayehu and Abebe, about fiscal reforms in Ethiopia, found that the VAT revenue collection in Ethiopia had shown a significant increase of 50 percent than the substitute sales tax since its introduction. They argued that VAT collection domestically contributed 14.9 percent of their total revenue, while VAT charged on imports contributed 27.1 percent. The authors attributed the significant influence of import VAT to the total VAT collection in Ethiopia to its well-controlled adoption. Finally, very few researchers have analyzed the lack of VAT neutrality and have comprehensively analyzed the social impact of VAT to determine the best VAT model that fits low-income households in developing countries.

III. Methodology

To examine the causal relationship between social conflicts and value-added tax in Mozambique, we use the Vector Error Correction Model (VECM). To estimate our model, we divided the methodology into three steps: the first is to inspect the existence of stationarity in the variables using the Augmented Dickey-Fuller (ADF) Unit Root test proposed by Dickey and Fuller (Dickey and Fuller, 1979); Then the Johansen cointegration test was performed (Johansen, 1988,

[5] According to world bank development indicators, In 2019 the GDP per capita of Mozambique was $487.

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1990) to see the order of cointegration. And in the last, we performed the granger causality test (Granger et al., 1974), which is based on Vector Error Correction Models. This test is used to determine the causality direction between the variables.

a) Data

In this research, I employ time series quarterly data covering the period from the first quarter of 1994 to the fourth quarter of 2018. Variables that are used are the degree of social conflicts, which is measured by the number of participants in riots, demonstrations, protests, and strikes, VAT variable which is measured as the share of VAT on total revenue, and the Government Expenditure as a total amount spent on capital expenditure. The degree of social conflicts was obtained from the social conflicts Africa Database (SCAD) and center for democracy studies (CDS); VAT data was obtained from the Mozambique Tax Authority, and government expenditure data was obtained from Mozambique Administrative Tribunal. To proceed with the estimation, I converted all of the variables into a log form. "A model with a log dependent variable often more closely satisfies the assumptions when logs are applied, the distributions are better behaved, and taking logs reduces the extrema in the data and curtails the effects of outliers" (Woolridge, 2012).

b) Vector Error Correction Models

When using time series data, it is important to perform a stationarity test to ensure that it is stationary. If the data is or not stationary, we may have spurious regression, which can mislead our results. If series are not stationary, it means that data generated does not evolve around 0, meaning that they exhibit a trend. (Dickey and Fuller, 1979). Thus, in this research, I used ADF to test the stationarity of the variables. ADF was used because in this research there is no missing gap and also there is no significant structural break. Once found that the variables are not stationary, then we can proceed with the cointegration test. In this research, I do this by using the Johansen cointegration test (Johansen and Juselius 1988; Johansen 1990). This test gives us two results: Maximum eigenvalue and trace statistic.

When two or more variables are cointegrated, it implies that there is a long-run relationship, meaning that there must exist some granger causality among variables (Maddala and Kim, 1998). Hence, we can proceed using the Granger-causality test to examine the nature of the relationship between variables; if they are cointegrated within the first difference, the VAR model cannot be used because it can mislead the results. (Engle and Granger, 1987), Thus, in the cointegrated variables, there is a need to include an error-correction to examine the equilibrium relationship and capture the short-run and long-run dynamics. Below is our specified VECM model, composed of three variables.

$$\Delta lnSC_t = \sigma + \sum_{i=1}^{k\ 1} \beta_1 \Delta lnSC_{t-i} + \sum_{i=1}^{k\ 1} \vartheta_j\, lnVAT_{t-j} + \sum_{i=1}^{k\ 1} \varphi_m \Delta lnGovExp_{t-m} + \lambda_1 ECT_{t-1} + \varepsilon_{1t} \quad (1)$$

$$\Delta lnVAT_t = \alpha + \sum_{i=1}^{k-1} \beta_1 \Delta lnSC_{t-i} + \sum_{i=1}^{k-1} \boldsymbol{\vartheta_j lnVAT_{t-j}} + \sum_{i=1}^{k-1} \varphi_m \Delta lnGovExp_{t-m} + \lambda_2 ECT_{t-1} + \varepsilon_{2t} \quad (2)$$

$$\Delta lnGovExp_t = + \sum_{i=1}^{k-1} \beta_1 \Delta lnSC_{t-i} + \sum_{i=1}^{k-1} \vartheta_j\, lnVAT_{t-j} + \sum_{i=1}^{k-1} \boldsymbol{\varphi_m \Delta lnGovExp_{t-m}} + \lambda_3 ECT_{t-1} + \varepsilon_{3t} \quad (3)$$

Where, β_1, ϑ_j, and φ_m, are the short-run dynamic coefficient of the model's adjustment long-run equilibrium; K-1 is the lag length reduced by 1; λ_i denotes speed of adjustment coefficient with a negative sign; ECT_{t-1} is the error correction term, which is the lagged value of the residuals obtained from cointegrating regression of the dependent variables on the regressor; this error correction term contains information derived from the long-run cointegrating relationship and ε_{it} denotes our residuals.

IV. Findings and Discussions

To better understand the relationship between social conflicts and VAT, I summarized the variable data using descriptive statistics in Table 1. Then I present a unit root test proposed by ADF, followed by the Johansen cointegration test using trace and max statistics. And finally, I present the main results using the VECM model, where first I present the long-run and then the short-run relationship.

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Table 1: Descriptive Statistics

Variables	Mean	SD	CV	Min	Max
social conflicts	8.200	1.101	0.134	5.704	9.798
value-added tax	3.744	0.403	0.108	2.933	4.331
government expenditure	19.710	0.785	0.039	18.360	20.973

a) Unit Root Test Results

The ADF test performed shows us that the variables are not stationary and levels; therefore, to make them stationary; I had to take the first differencing; after taking the first difference, the data became stationary. Below table 2 shows the result of the ADF stationary test.

Table 2: ADF Test for Unit Root

Variable	Specification	Z(t)	5% critical value
ln(SC)	Intercept	1.900	-1.950
	Intercept & trend	-0.819	-3.152
Δ *ln(SC)*	Intercept	-6.175	-1.950**
	Intercept & trend	-6.708	-3.452**
ln(VAT)	Intercept	0.548	-1.950**
	Intercept & trend	-0.998	-3.452
Δ *ln(VAT)*	Intercept	-6.976	-1.950**
	Intercept & trend	-7.246	-3.452**
ln(GovExp)	Intercept	3.490	-1.950
	Intercept & trend	-1.863	-3.452
Δ *ln(GovExpS)*	Intercept	-7.876	-1.950**
	Intercept & trend	-8.429	-3.452**

*Note: ** denotes significance at 5 percent.*

The above table shows that the absolute value of t statistics in the log of social conflicts (ln (SC)) with a value 1.900 in intercept and -0.819 intercept & trend are lower than 5 percent critical values of -1.950 and -3.152 respectively; this tells us that we can not reject the null hypothesis, meaning that the variable ln (SC) is not stationary. The same can be said regarding the log of value-added tax (ln (VAT)) with t statistic of 0.548 in intercept and -0.998 in intercept & trend and a 5 percent critical -1.950 in intercept and -3.452 intercept & trend; also, in the log of government expenditure (ln (GovExp)) with t statistic of 3.490 in intercept and -1.863 in intercept and trend and 5 percent critical value of -1.950 in intercept and -3.452 intercept & trend. This result tells us that we cannot reject the null hypothesis in this series, meaning that all the series are not stationary at level. Therefore, we proceed to report the results at the first level.

The results from the first difference in the social conflicts (Δ ln (SC)) variable shows us that the absolute value of -6.175 intercept and -6.708 in intercept& trend in t statistics are higher than 5 percent critical values of -1.950 intercept and -3.452 in intercept & trend respectively; we can reject the null hypothesis, and accept the alternative hypothesis meaning that the variable (Δ ln (SC)) stationary. Also, both of value-added tax (Δln (VAT) and log of government expenditure (ln (ΔGovExp)) in their first difference, the t statistics are higher than critical values. Therefore, in this series, the results show that we can reject the null hypothesis when taking the first difference. The ADF test for Unit Root suggests that our series are not stationary at level, but they are at first difference. We conclude that our series is integrated with order one I (1). So, in this situation, it is necessary to perform a cointegration test to establish whether there exists a long-run relationship among our variables.

b) Cointegration Results

In econometrics, when the series is integrated with an order I (1), two prominent cointegration tests can be performed: the Engle-Granger cointegration test and the Johansen cointegration test. In this research, we use the Johansen cointegration test, and it is performed on the level form of our variables.

Before moving forward, we have to perform a lag selection test; as we know in economics, the dependence of an independent variable on a dependent variable is rarely instantaneous; Very often, the independent variable responds to the dependent variable with an interval of time, and this interval of time is called lag, there is no rule for how much lags should

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be chosen, but too many lags can cause a problem of serial correlation and misspecification errors, and lose a degree of freedom. To avoid these problems, in this research, I use the Akaike information criterion which best suits our model.

Table 3: Johannsen Cointegration Results (trace statistic)

Maximum Rank	Trace statistic	5% critical value
0	45.52	29.68
1	13.99	15.41
2	2.82	3.76

*Notes: Rank 0,1,2 are respective null hypotheses, where rank 0 means that there is no cointegration equation, * denotes rejection at 5 percent level.*

Looking at table 3, the rank 0 with trace statistics of 45.52 is higher than the critical value of 29.68; In this regard, we reject the null hypothesis. In the maximum rank one, which means that there is one cointegration in our equation in this model, here the trace of 13.99 is lower than the 5 percent critical value; Therefore, we cannot reject the null hypothesis of no cointegration; The same can be said at maximum rank two where our trace statistic of 2.82 is lower than 5 percent critical value of 3.76, meaning that our equation is cointegrated rank 1 and 2.

Table 4: Johansen Cointegration Results (Max Statistic)

Maximum Rank	Max Statistic	5% critical Value
0	38.23	20.97
1	5.27	14.07
2	2.01	3.76

Notes: Rank 0,1,2 are respective null hypotheses, where the rank 0 means that there is no cointegration equation

Table 4 presents max statistic results; The null hypothesis that we have a cointegration equation on maximum rank 0 is rejected because the max statistics of 38.23 is higher than the 5 percent critical value of 20.97. But looking at the two maximum ranks, we cannot reject the null hypotheses of no cointegration because the max statistic of 5.27 is lower than the critical value of 14.07; The same conclusion can be drawn at maximum rank two, where the max statistic is 2.01 and lower than 5 percent critical value of 3.76. Given the result of trace statistics and max statistics, we conclude that we reject the null hypothesis of no cointegration in our model. The above results imply that our series are related and can be combined linearly. Both maximum rank 1 and 2 agree with the hypothesis that we have more than one cointegration equation in this model. Therefore, we can proceed with estimating our three variable VECM even though the cointegration test shows two cointegrating equations (Harris 1995).

c) *Results of Vector Error Correction Model for Long-run Relationship*

Once found that our results are cointegrated, this implies that there is a long-run relationship between social conflicts, value-added tax, and government expenditure in Mozambique. Hence, we can proceed with the estimation using both long-run and short-run models. To estimate the long-run model, we will be using the VECM. VECM can be understood as a system with a vector of two or more variables, where all the variables are endogenous, and we do not have an exogenous variable. And we use VECM to examine the long, and short-run dynamics of Social conflicts, value-added tax, and government expenditure; the VECM model restricts the long-run behavior of endogenous variables to converge to their cointegrating relationship; This cointegrating term is called the error correction term.

The long-run relationships can be derived using Johansen normalization restriction, where the error term ECT_{t-1} is generated. The below ECT equation result shows that in the long-run, VAT denoted by logVat, with a value of -1.615, and government expenditure denoted by logpubexp with a value of -0.479 in our results, have a positive impact on social conflicts, represented by logScad; and both coefficients are statistically significant and 1 percent level, which means that in the long-run, both value-added tax and government expenditure have symmetric effects on social conflicts.

$$ECT_{t-1} = [1.000logScad - 1.615logVat - 0.479logGovExp + 7.162]$$

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The generalized form of the specified model, which has social conflicts as the target variable (Equation 1), can be specified as below:

$$\Delta lnSC_t = 0.006 - 0.622\Delta lnSC_{t-1} + 0.858\Delta VAT_{t-1} + 0.19\Delta GovExp_{t-1} - 0.179ECT_{t-1}$$

In the above equation results, the ECT (-0.179), indicates that the adjustment term is negative and statistically significant at 1 percent level; this suggests that there is long-run causality running from value-added tax and government expenditure to social conflicts. For the short-run coefficient looking at VAT with a value of 0.858 and significant at 1 percent level, we can say that the new VAT system causes social conflicts, but government expenditure doesn't cause social conflicts in the short-run because our coefficient is not significant. Looking at the VAT equation (Table 5) the ECT with a value -0.0762 is negative and significant at 5 percent; This denotes a convergence to long-run equilibrium, showing us that there is causality in the long-run. Observing the short-run causality effects, we can infer causality from social conflicts to VAT at a 1 percent level, while for government expenditure, we cannot infer causality in the short run. And last looking and the public expenditure equation with positive and not significant ECT, we cannot infer long-run causality, meaning that in this equation, there is no convergence to long-run equilibrium. Both equation 1 and 2 with higher values of ECT denotes that the alteration fluctuating fast tells us that in the long-run, there is bidirectional causality between VAT and social conflicts in Mozambique. This result leads to the "*tax-burden*" hypothesis.

Table 5: Results of Vector Error Correction Model

Independent Variables	Dependent Variables		
	ΔSocial Conflicts	ΔVAT	ΔGov Exp
ΔSC (-1)	-0.622***	-0.248***	-0.105*
	(0.0911)	(0.0556)	(0.0628)
ΔSC (-2)	0.259**	0.0576	-0.225***
	(0.102)	(0.0732)	(0.0782)
ΔVAT (-1)	0.858***	0.0144	-0.0386
	(0.216)	(0.0623)	(0.149)
ΔVAT (-2)	0.251	-0.0407	0.265**
	(0.182)	(0.132)	(0.125)
ΔGov Exp (-1)	0.197	0.0869	-0.0487
	(0.148)	(0.111)	(0.102)
ΔGov Exp (-2)	0.0168	-0.0483	-0.166
	(0.148)	(0.0905)	(0.102)
ECT (-1)	**-0.179*** (0.0584)-**		
ECT (-2)		**-0.0762** (0.0356)**	
ECT (-3)			0.0419
			(0.0403)
Constant	0.00626	0.00212	0.0305***
	(0.0164)	(0.0100)	(0.0113)
Observations	97	97	97

*Notes: Standard errors are in parentheses, *, **, *** denotes significance at 10, 5, and 1 percent.*

This result is consistent with our expectation about causality between VAT and social conflicts in Mozambique. The significant implication that comes from our VECM long-run relationship result is that a continuous increase of social conflicts in the long-run causes an increase in prices of goods and services because VAT is a primary source of tax revenue. Therefore, lowering the VAT on the prices of goods and services will reduce State revenue capacity, which will affect government expenditure. Again, reducing government expenditure will increase social conflicts because the government needs revenues, which are mainly composed of VAT revenue, to execute public spending. Thus, we have a vicious circle of prices of

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goods and services increase, social conflicts increase. Regarding government expenditure, we did not see any relationship with social conflicts or even VAT, and therefore, to achieve fiscal sustainability in the long-run, the government needs to diversify and expand its revenue system. Also, the policymakers need to design a Tax revenue system and specifically a new VAT revenue system that suits the local reality, so the VAT will not be a burden for most of the population who live in extreme poverty. Also, the government of Mozambique should encourage services that boost domestic production so that even when prices fluctuate internationally, the local impact can be minimized. And In the long-run, the policy implication suggested that there is interdependence between the increase in price on goods and services affected by VAT and the rise of social conflicts.

d) VECM and Wald Test for Short-run Causality Results

In this research, I test the short-run causality between the variables using the Wald test. To check causality, I use the Wald Coefficient test, which tells the direction of causality. As a criteria, we reject the null hypothesis if the probability value of chi-square is below or equal to 5 percent. The null hypothesis of this test is described below:

- H_0: no Granger-Causality
- H_1: the null hypothesis is not true

In Panel 1 in table 6 looking at social conflicts as a dependent variable, the VAT with a chi-square of 3.13 and probability of 0.00 and significant at 1 percent level, and here we can reject the null hypothesis meaning that VAT does granger social conflicts. The same cannot be inferred with government expenditure, which has a chi-square of 0.55 and a probability value of 0.46 and higher than 5 percent level, here we cannot reject the null hypothesis. Meaning that government expenditure does not granger social conflicts.

Table 6: Short-Run Granger Causality Test

Panel 1 Dependent Variable Δsocialconflicts			
Excluded	Chi-sq	DF	Probability
ΔVAT	3.13		0.00
ΔGov Exp	0.55		0.46
Panel 2 Dependent Variable ΔVAT			
Excluded	Chi-sq	DF	Probability
Δ social conflicts	24.08	22	0.08
ΔGov Exp	0.74		0.39
Panel 3 Dependent Variable ΔGov Exp			
Excluded	Chi-sq	DF	Probability
Δ social conflicts	0.59	2	0.44
ΔVAT	0.89	2	0.34

In Panel 2, where VAT is a dependent variable to social conflicts with a chi-sq. 28.08 and probability value of 0.08, we cannot reject the null hypothesis, and we can conclude that social conflicts does not granger VAT in Mozambique in the short-run. However, looking at P-Values in panel three, both social conflicts and VAT do not granger government expenditure; in both variables, we cannot reject the null hypothesis, which means that in the short-run, there is no causality from both social conflicts and VAT to government expenditure. Overall, looking at these results, we can conclude that there is a unidirectional causality running from social conflicts to VAT in the short-run in Mozambique. This result leads to the "*tax-conflicts*" hypothesis, which means that the increase in prices of goods and services affected by the new VAT system in Mozambique is the source of social conflicts in the short-run. To control social conflicts in the short run, the government of Mozambique should exempt or reduce VAT on essential goods and services, such as cereals (especially rice, maize, and wheat) and fuel, which are crucial for low-income households.

V. Conclusion and Policy Implications

The present research aimed at studying the relationship between VAT and social conflicts in the short and long-run in Mozambique from 1994 to 2018. For that purpose, I used two hypotheses, "*tax burden*" and "*tax conflicts*." The study was motivated by the fact that the oscillation in prices in the international market affected the goods and services included in the new VAT system within the Mozambican market. However, even with this relationship, there has never been any study that looked at the social implications. This study filled the gap in the research

I used econometric analysis to understand the short and long-run relationship between VAT and social conflicts using VECM models. From this model I concluded that in the long-run, there is a bidirectional relationship between social conflicts and VAT, the

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results described above show that social conflicts triggered an increase in the prices of goods and services included in the new VAT system and vice versa. These results supported our "*tax-burden*" hypothesis. while in the short-run, the results show a unidirectional relationship, running from VAT to social conflicts. This result substantiated the "*tax-conflicts*" hypothesis. From these results, it can be said that to contain social conflicts in the short-run, the government of Mozambique should exempt or reduce the VAT rate on essential goods and services, such as cereals and fuel, which are crucial for low-income households.

A policy implication drawn from this study is that, in the long-run, to contain social conflicts, the government should design a new VAT system that is adapted to the local socio-economic conditions, which comes with adjustment programs for low-income households, so that VAT will not be regressive. In addition, the government of Mozambique should encourage services that boost domestic productions so that even when prices fluctuate internationally, the local impact will be minimized.

Similarly, the government of Mozambique should seek to expand its tax base. VAT should not be seen as a substitute for other taxes, such as income tax or property tax. Further, the Mozambican government should move to the formal economy. By making these changes, the government will increase the sources of revenue to execute the government expenditures essential to contain social conflicts.

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Socially Inclusive Versus Uneven Development: Developed and Peripheral Economies in a Global Context

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Abstract- After the Cold War and the fall of Berlin Wall in 1989, a new world order led by the USA emerges as the axis of a new unipolar order that brings with it economic liberalization and the globalization process, implanted an economic strategy nurtured in the spirit of liberalism. Adam Smith's 18th century economic economy from "Laissez Faire Laissez Passer" upholds the economic self-regulation of nations without state intervention. Currently becoming the neoliberal strategy that has dominated the world scene for more than forty years.

Although its planetary implementation has generated benefits due to the associated boom in international trade in the global market, it has also led to adverse effects in different ways and intensities, both among developed and peripheral economies. Such as a greater economic distancing between rich and poor at the planetary level, regional imbalances and greater polarization of wealth in peripheral economies, and multiple externalities and exacerbation of their structural problems.

Keywords: socially non-inclusive, balanced development, uneven development, economic liberalization, globalization.

GJHSS-E Classification: FOR Code: 349999p



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Socially Inclusive Versus Uneven Development: Developed and Peripheral Economies in a Global Context

Desarrollo Socialmente Incluyente versus Desequilibrado: Economías Desarrolladas y Periféricas en un Contexto Global

Octavio Luis-Pineda

Resumen- Luego de la Guerra Fría y la caída del Muro de Berlín en 1989, surge un nuevo orden mundial liderado por Estados Unidos como eje de un nuevo orden unipolar que trae consigo la liberalización económica y el proceso de globalización, implantado una estrategia económica alimentada en el espíritu de liberalismo y la economía económica del siglo XVIII de Adam Smith del "Laissez Faire Laissez Passer" que defiende la autorregulación económica de las naciones sin intervención estatal. Tesis que alimenta la estrategia neoliberal que domina el panorama mundial desde hace más de cuarenta años.

Si bien su implementación planetaria ha generado beneficios debido al auge asociado del comercio internacional en el mercado global, también ha propiciado efectos adversos de formas e intensidades diferentes, tanto entre economías desarrolladas como periféricas. Como un mayor crecimiento económico para ambos grupos, pero igualmente un mayor distanciamiento económico entre ricos y pobres a nivel planetario, desequilibrios regionales y mayor polarización de la riqueza en la periferia, así como múltiples externalidades y exacerbación de sus problemas estructurales a su interior.

Este artículo busca demostrar empíricamente que, en ausencia de un Estado rector bajo un esquema democrático maduro, con fuerte participación y conciencia social, capaz de formular políticas económicas incluyentes, lejos de recetas hegemónicas y promover el desarrollo a fondo de la economía, con la capacidad de balancear el binomio crecimiento y bienestar social en un contexto sostenible, los costos socioeconómicos y externalidades asociadas a la liberalización comercial superan con creces los beneficios logrados por su inserción en el mercado global independientemente de su tipo de régimen político. Periodo de análisis: 1980-2019.

Palabras clave: desarrollo socialmente incluyente y excluyente, desarrollo equilibrado y desigual, liberalización económica, globalización.

Abstract- After the Cold War and the fall of Berlin Wall in 1989, a new world order led by the USA emerges as the axis of a new unipolar order that brings with it economic liberalization and the globalization process, implanted an economic strategy nurtured in the spirit of liberalism. Adam Smith's 18th century economic economy from "Laissez Faire Laissez Passer" upholds the economic self-regulation of nations without state intervention. Currently becoming the neoliberal strategy that has dominated the world scene for more than forty years.

Although its planetary implementation has generated benefits due to the associated boom in international trade in the global market, it has also led to adverse effects in different ways and intensities, both among developed and peripheral economies. Such as a greater economic distancing between rich and poor at the planetary level, regional imbalances and greater polarization of wealth in peripheral economies, and multiple externalities and exacerbation of their structural problems.

This article aims at empirically demonstrates that, in the absence of a leading State under a mature democratic scheme with strong participation and social awareness, capable of formulating inclusive economic policies, far from hegemonic recipes and promote rock-bottom development within the economy and capable of balancing the binomial growth - social wellbeing under a sustainable context, the socioeconomic costs and externalities inflicted by trade liberalization farly exceeds the benefits achieved by its insertion into the global market regardless of its type of political regime. Analysis period: 1980-2019.

Keywords: socially non-inclusive, balanced development, uneven development, economic liberalization, globalization.

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I. Introducción

La apertura comercial o mundialización económica ha impactado de diversas maneras e intensidades a las economías desarrolladas y periféricas. De tal suerte que, aunque la apertura comercial ha estimulado el crecimiento en ambos grupos de países, los periféricos y emergentes han tenido que pagar un alto costo socioeconómico para crecer, acrecentando o agudizando sus problemas estructuras añejos. Aquí en este breve espacio intentaremos hacer un breve recuento sobre algunas de esas implicaciones con especial referencia al caso de México, durante el periodo histórico 1980-2019.

a) Implicaciones de la Mundialización Económica en Economías Desarrolladas y Periféricas

Para probar esta hipótesis tomamos el comportamiento de un grupo selecto de economías desarrolladas y economías emergentes y periféricas

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durante el periodo 1980-2019 que podemos intentaremos probar dos puntos importantes en este trabajo:

(i). La mundialización económica ha propiciado un crecimiento tanto en el producto como en el per cápita tanto en economías desarrolladas como periféricas durante el periodo de análisis.

(ii). Las economías desarrolladas han crecido tanto en producto como en per cápita sin descuidar sus niveles de bienestar social ni inversión en I&D, es decir, en gasto social y sin aumentar la desigualdad económica al interior de sus economías. Mientras que las periféricas (y emergentes) han crecido en producto y per cápita, pero con grandes desequilibrios a su interior, porque han sacrificado su gasto social y en su mayoría han incrementado su nivel de desigualdad económica a su interior, descuidando su inversión en I&D.

(iii). La mundialización económica ha propiciado un crecimiento desigual entre economías desarrolladas y periféricos durante el periodo de análisis.

b) Crecimiento Económico en la Mundialización Económica: Economías Desarrolladas y Periféricas

Para probar esta hipótesis empleamos indicadores internacionales como OCDE, CEPAL, etc., citados al calce de la tabla siguiente analizamos y el comportamiento de parámetros pertinentes como el PIB y per cápita(p.c.) e inversión en ciencia y tecnología (I&D) durante 1980-2019 de un grupo selecto de países desarrollados y periféricos y emergentes durante el lapso referido, como se reporta en el *Cuadro 1.*0:

CUADRO 1.0

PANORAMICA MEXICO-MUNDO.PAISES SELECCIONADOS(1980-2019).CRECIMIENTO

PAIS	PIB(mmUs$dls)		P.C.($dls)		I&D(%PIB)	
	1980	2019*	1980	2019*	1980	2019*
MX	205.1	1,270.0	$2,958	$10,268	0.2	0.6
USA	12,597.7	55,753.1	$12,598	$55,753	2.4	2.8
CANADA	273.9	1,740.0	$11,135	$51,589	0.4	1.6
ALEMANIA	950.3	3,860.0	$10,170	$47,447	2.1	3.1
U.K.	564.9	2,829.1	10,032.1	$47,446.7	1.1*	1.7
JAPON	1,105	5,065	9,465.4	$40,246.9	2.1*	3.3
SUIZA	223.7	791.5	18,832.2	$81,993.7	2.1	3.1
SUECIA	142.1	530.9	$17,000	$58,013	3.3	3.3
NORUEGA	64.4	403.3	$11,230	$92,556	2.5	2.1
POLONIA	659.8	595.9	$17,312	$15,695	0.7	0.9
ESPAÑA	232.8	1,390.0	$13,415	$33,393	0.8	1.2
CHINA	191.2	14,280.0	$195	$8,255	0.6	2.2
INDIA	186.3	2,870.0	$267	$2,152	0.6	0.7
BRASIL	235.0	1,840.0	$1,940	$11,122	0.8	1.2
ARGENTINA	77.0	445.4	$2,738	$9,743		
COLOMBIA						
CHILE	29.0	282.3	$2,577	$15,092	0.5	0.4
GUATEMALA	7.9	76.7	$1,082	$3,413	0.0	0.0

*Cifra histórica más cercana a la oficial encontrada para estas economías

Fuentes:

OCDE: http://stats.oecd.org/Index.aspx?datasetcode=SOCX_AGG

CEPAL: http://websie.eclac.cl/sisgen/ConsultaIntegrada.asp?idAplicacion=1&idTema=6&idioma=

NATIONMASTER: http://www.nationmaster.com/graph/eco_dis_of_fam_inc_gin_ind-distribution-family-income-gini-index

CIA FACTBOOK :https://www.cia.gov/library/publications/the-world-factbook/index.html

Donde resalta que tanto el PIB como el per cápita de todos estos países crecen durante el periodo 1980-2019. No obstante, destaca que los países desarrollados, con excepción de algunos países emergentes como China y Brasil, crecen tanto en PIB como en per cápita sin descuidar incrementar su inversión en ciencia y tecnología. En tanto la mayoría de las economías periféricas no siguen esta política y soslayan este rubro estratégico para el desarrollo de sus economías. México por su parte, resulta un caso emblemático pues que es el único país del grupo del TMEC, que no invierte sostenidamente en este renglón como los hacen de manera significativa sus socios comerciales Estados Unidos y Canadá, duerante este lapso. Dado que México no alcanza el 1% de su PIB para finales del periodo (como Brasil y China, que exceden el 1.2% y 2.19% para 2019), los EEUU aumentan su inversión en ciencia y tecnología del 2.44% al 2.84% y Canadá del 0.42% al 1.57% durante el periodo.

c) Crecimiento Económico Desigual en Periferia vs Balanceado en Economías Desarrolladas

Para este análisis empleamos el gasto social (%PIB), el coeficiente de GINI e inversión en ciencia y tecnología (I&D) (%PIB) durante 1980-2019. Como se muestra en el *Cuadro 2.0:*

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CUADRO 2.0										
PANORAMICA MEXICO-MUNDO.PAISES SELECCIONADOS(1980-2019).BIENESTAR SOCIAL										
PAIS	PIB(mmUs$dls)		P.C.($dls)		GASTO.SOC(% PIB)		GINI		I&D(% PIB)	
	1980	2019*	1980	2019*	1980	2019*	1980	2019*	1980	2019*
MX	205.1	1,270.0	$2,958	$10,268	10.9	18.4	51.9	45.9	0.2	0.6
USA	12,597.7	55,753.1	$12,598	$55,753	20.5	13.4	51.9	45.9	2.4	2.8
CANADA	273.9	1,740.0	$11,135	$51,589	nd	15.2	35.2	30.7	0.4	1.6
ALEMANIA	950.3	3,860.0	$10,170	$47,447	1.7	12.2	51.9	30.6	2.1	3.1
U.K.	564.9	2,829.1	10,032	47,446.7	35.6	37.0	36.0	35.1	1.1*	1.7
JAPON	1,105	5,065	9,465.38	40,246.9	30.78	37.22	30.80	29.90	2.1*	3.3
SUIZA	223 713	791.5	18832.2	81993.7	29	32.7	30.1	30.6	2.3	1.0
SUECIA	142.1	530.9	$17,000	$58,013	30.0	28.4	26.0	27.0	3.3	3.3
NORUEGA	64.4	403.3	$11,230	$92,556	31.0	37.7	25.0	25.0	2.5	2.1
POLONIA	659.8	595.9	$17,312	$15,695	14.2	21.3	25.2	31.8	0.7	0.9
ESPAÑA	232.8	1,390.0	$13,415	$33,393	19	42.8	42.8	36.0	0.8	1.2
CHINA	191.2	14,280.0	$195	$8,255	nd	2.1	41.2	47.4	0.6	2.2
INDIA	186.3	2,870.0	$267	$2,152	1.6	15.6	32.1	35.7	0.6	0.7
BRASIL	235.0	1,840.0	$1,940	$11,122	17.6	35.5	57.9	53.9	0.8	1.2
ARGENTINA	77.0	445.4	$2,738	$9,743	19.1	16.5	42.8	41.4	0.4	0.6
COLOMBIA	33.4	323.6	$1,204	$7,838	6.0	19.6	59.1	50.4	0.3	0.2
CHILE	29.0	282.3	$2,577	$15,092	11.9	22.4	55.3	47.7	0.5	0.4
GUATEMALA	7.9	76.7	$1,082	$3,413	7.0	12.5	58.3	52.0	0.0	0.0
*Cifra histórica más cercana a la oficial encontrada para estas economías										
Fuentes:										
OCDE: http://stats.oecd.org/Index.aspx?datasetcode=SOCX_AGG										
CEPAL: http://websie.eclac.cl/sisgen/ConsultaIntegrada.asp?idAplicacion=1&idTema=6&idioma=										
NATIONMASTER: http://www.nationmaster.com/graph/eco_dis_of_fam_inc_gin_ind-distribution-family-income-gini-index										
CIA FACTBOOK :https://www.cia.gov/library/publications/the-world-factbook/index.html										

Donde observamos en cuanto al gasto social que tanto México, así como las economías dentro y fuera de la región latinoamericana han enfatizado su gasto social como el caso de India, Chile, y Brasil. Aunque China todavía se encuentra con un nivel muy rezagado en este rubro, pues se ubica por debajo inclusive de Guatemala para finales del periodo. Lo importante de destacar aquí es que el auge económico alcanzado por la mayoría de economías de ambos grupos de países, no se ha traducido para los periféricos y emergentes en disminuir la desigualdad de ingresos al interior de sus economías. A juzgar por el comportamiento contrastante del Coeficiente de Gini entre ambos grupos de países. Pues a diferencia de las economías desarrolladas (excepción hecha del caso de Estados Unidos (45.9), el resto de economías desarrolladas manejan valores que oscilan entre 25.0-35.0 en tanto los periféricos reportan niveles por arriba del 40.0 como el caso de Brasil (53.9), Guatemala (52.0), Chile (47.7), China (47.4), México (45.9). A propósito, en toda América, Canadá es el país que ostenta el menor nivel de desigualdad económica a estas alturas (30.7).

Cabe mencionar que bajo el actual contexto global y de mundialización económica, de entre los países desarrollados, las economías escandinavas poseen los mejores estándares socioeconómicos y ambientales (como Suecia y Noruega mencionados aquí) pues representan el mejor prototipo de desarrollo balanceado, es decir, un tipo de desarrollo sustentable y socialmente incluyente conocido en conjunto como "economías de bienestar" donde el estado juega un papel central y determinante en la economía, *vid, Alcalde, M. (19jul.2014).* Bajo una estrategia económica que ha sido instrumentada de manera exitosa en todas las economías que conforman la península escandinava desde tiempo atrás, *vid, Erikson, Robert (1987) y Luis Pineda, O. (8ene, 2021).*

En otras palabras, el trasfondo del problema del desequilibrio entre economías desarrolladas y periféricas en el contexto de la mundialización económica subyace en la estrategia económica de corte neoliberal adoptada por las economías periféricas durante las últimas cuatro décadas, concomitante con la apertura comercial y globalización económica privilegiado un crecimiento a ultranza a nivel mundial, soslayando el bienestar social y deterioro ambiental, pero afectando principalmente a economías periféricas como México y otras regiones fuera de Latinoamérica como Asia, Africa y Oceanía. Desequilibrios que podrían explicarse en buena medida como resultado de la adopción de la estrategia neoliberal imperante derivada de la influencia presiones hegemónicas auspiciadas por organismos internacionales como el FMI a través del Consenso de Washington, imponiendo "10 medidas" hegemónicas *vid, ElMostrador(11oct, 2004)* principalmente a los países de la región que resultan a la postre desastrosas para estas economías *vid, Casilda, R.(2004) y Rangel, R.et al.(2012)* orientado no solamente imponer estas "camisas de fuerzas" a las principales economías de la región mediante políticas hegemónicas sino obstaculizar o inclusive anular la rectoría económica del Estado en estas economías, como lo hicieron para el caso específico de México, que representa el "mejor ejemplo" de la aplicación de dichas políticas de "antidesarrollo" en la región *vid, Guillén, Arturo (2012)* y donde este tipo de presiones hegemónicas, logran revertir la bonanza económica alcanzada por la nación durante la época conocida como "Milagro Mexicano", *vid Carmona, F.et al.(1974).* Época durante la cual el éxito económico nacional descansa fuertemente en el fortalecimiento del mercado interno o crecimiento "endógeno", particularmente en el campo y a una fuerte intervención del Estado para garantizar así un equilibrio económico entre los sectores con mínima dependencia del mercado externo bajo una

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política de sustitución de exportaciones, pero que beneficia a la industria nacional frente al capital externo.

Situación que luego se revierte con la apertura del comercial a ultranza instrumentada por México por recomendaciones del FMI concomitante con la mundialización económica y la virtual anulación de la rectoría económica del Estado y el principio de soberanía nacional bajo el nuevo paradigma de la globalización a nivel planetario, que conlleva entre otros efectos la penetración de capitales en economías periféricas en concordancia con la Teoría de Internacionalización del Capital bajo un contexto global, *vid Luis Pineda. O. (1998)* así como la clara transnacionalización del gran capital en México, donde éste resulta el mejor ejemplo de la aplicación a ultranza de esta estrategia de apertura comercial y la adopción de una política "antidesarrollista" para la nación como lo refiere atinadamente A.Guillén, *vid Guillén, Arturo (2012). vid, Hernández L.,H.(2013).* Logrando así que las consecuencias para México de la estrategia neoliberal haya sido totalmente rebasada por la realidad, *vid, Castelanos, A. (30ene, 2004),* propiciando entre otros efectos indeseables para la nación, el ahondamiento del "dualismo económico" y asimetría regional existente en el México como la generación de dos macro-regiones en México: una "Norte"(conformada por las regiones económicas del norte, noroeste, occidente y centro) y frente a otra "Sur" (conformada por las regiones pacífico-sur, sureste y golfo), caracterizada el Norte por una mayor concentración de capital y tecnología y mejores niveles de vida, frente a la Sur, quien manifiesta rezago económico y tecnológico y bajos niveles de vida, (México Desigual) fenómeno que viene gestándose desde tiempo atrás, *vid, Gollás, Manuel (1982).* Bajo esta premisa, a partir de la experiencia histórica nacional y tomando en cuenta que la mayoría de países de la periferia y emergentes como México, han adoptado la tesis neoliberal y aplicado a sus economías y experimentado crecimiento durante estos años, aunque acompañado con altos costos sociales y múltiples externalidades socioeconómicas y ambientales que resulta imposible pormenorizar en este breve espacio.

La reflexión final es que a pesar de que las economías periféricas y emergentes como México han crecido mediante la apertura de mercados, la bonanza económica no se ha reflejado en un mayor bienestar social de sus habitantes ni una disminución de su asimetría regional interna, y un mayor énfasis en inversión en ciencia y tecnología. En tanto las economías desarrolladas han crecido manteniendo sus niveles de bienestar para sus poblaciones priorizando su inversión en ciencia y tecnología. Explicable porque en estos países existe un sistema democrático maduro donde el estado juega un papel central o preponderante como rector de la economía, como en el caso de las economías escandinavas *vid, Luis Pineda, O. (8ene, 2021)* donde existe alta participación social e involucrada en la formulación e instrumentación de la estrategia económica más conveniente al país, *vid Erikson, Robert (1987)* contario a lo sucede en la mayoría de economías periféricas o emergentes como México, donde ésta obedece al grupo en el poder, pero lejos usualmente de las verdaderas necesidades de la mayoría de la población. Donde existe un Estado omiso y permeado por la corrupción quien ha privilegiado la polarización de la riqueza al interior de la economía en favor de una minoría rapaz asociada al poder político, propiciando en México, por ejemplo, el surgimiento durante la etapa neoliberal una casta de multimillonarios en el país, *vid, Cardoso, V.et al(18ene, 2005).* Lo que hace comprensible y explicable las demandas de reconversión de la estrategia neoliberal desde años atrás por parte de algunos estudiosos en esta problemática, *vid, Luis Pineda, O.(2008).*

En síntesis, con base en la experiencia histórica mexicana y cara hacia el futuro, una estrategia plausible bajo el actual contexto global, tanto para México como también para muchas economías emergentes y periféricas es su alejamiento del enfoque neoliberal y poder trazar su propia ruta de crecimiento alejada de las recomendaciones del FMI que ha llevado al desastre a muchas economías de la región latinoamericanas en el pasado reciente como hemos destacado previamente, *vid, Bermúdez, Ángel (2019).* Como la instrumentada actualmente por México en su actual administración en su Plan de Desarrollo *vid, PND. AMLO (2019)* que comienza a dar sus primeros frutos estimulando un crecimiento económico esperado por arriba del 6% para 2021 *FMI (2jun2021)* bajo la premisa de que se trata de un crecimiento endógeno orientado a fortalecer la economía mediante inversiones públicas hacia regiones claves pero deprimidas como la Sur del país, y aminorar por esta vía la asimetría regional existente respecto del Norte, bajo un esquema de cero endeudamiento externo para reactivar la economía por la recesión derivada de la pandemia y financiar su combate, pues al respecto México ocupa el 13avo lugar a nivel mundial y el primer sitio en Latinoamérica *vid, Forbes (04ene, 2021)* así como el fomento de inversiones públicas en infraestructura para impulsar el desarrollo regional hacia regiones estratégicas pero deprimidas como la Sur para estimular la disminución de la actual asimetría regional Norte-Sur, para reactivar el crecimiento de la región Sur mediante cuantiosas inversiones como el megaproyecto Tren Maya del orden *$139mmp, vid, De la Rosa, A.(9ene, 2020)* así como Corredor interoceánico de Tehuantepec del orden de *20 mmp,* que aunque de menor cuantía que el Tren Maya resulta sumamente estratégico por su relevancia geoestratégica para México pues conllevará la reactivación comercial y de pasajeros, por ferrocarril y carretera, entre Atlántico y Pacífico contemplado a

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operar en 2023, *vid, T21. Mx (08 jun20)* así como otros importantes concurrentes en la región Sur como la refinería de Dos Bocas, en Tabasco del orden de 300mmd que entra en operaciones durante el mismo año referido, *vid, García, Karol (06Abr, 2021)* así como otros proyectos concurrentes en la región Maya como el aeropuerto de Tulum por un total aproximadamente *180 mmp, vid, Bnamericas (14 may, 2021).* Ponen de relieve la importancia y énfasis otorgado por la actual administración por impulsar un esquema de desarrollo regional más balanceado y alejado del enfoque del FMI, pues busca estimular crecimiento y bienestar social para la región Sur y sus pobladores en el futuro próximo como no había acontecido hasta ahora con la estrategia neoliberal instrumentada privilegiando tradicionalmente a la macroregión "Norte" (centro, occidente, norte, noroeste) del país durante el periodo de estudio.

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Economic Contribution of Cultural Industries: Evidence from Some Selected Countries

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Abstract- Cultural industries have become a significant component of modern economies. There is increasing attention measuring the economic contribution of these industries at national levels, particularly their impact on economic variables. The objective of this study is to illustrate concepts, approaches, methodologies related to cultural economics. Moreover, to shed light on measuring methods of the economic contribution of cultural industries. Using descriptive analysis, we examined the use of these approaches in some selected countries. These countries are; UK, Finland, France, Germany, Italy, and Spain from Europe. Canada and USA from North America. Australia, China and India from the Asia-pacific region. South American economic organization (MERCOSUR) countries for the South American region. South Africa and Egypt from Africa region. The main results revealed the increasing realization of measuring cultural economic contributions in developed countries rather than developing countries. Yet; data limitation is still the main problem of measuring the economic contribution of cultural industries. Furthermore, for international comparison purposes, there is a real need to develop new common concepts and measurements of the economic contribution of cultural industries.

Keywords: cultural economics, cultural industries, economic growth, economic impacts, economic contribution, cultural satellite accounts (CSA), economic size & structural analysis.

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Keywords: cultural economics, cultural industries, economic growth, economic impacts, economic contribution, cultural satellite accounts (CSA), economic size & structural analysis.

I. Introduction

There is considerable interest to measure the economic contribution of creative and cultural industries at national levels, particularly their impact on GDP (Gross Domestic Product), GVA (Gross Value Added), employment, and hence the impact on economic growth. Moreover, these impacts are extended to foreign trade, competitiveness, and foreign direct investment (FDI).

Nowadays, cultural industries have become an important component of modern economies and knowledge societies due to their impact on society's development, as the cultural sector may generate two types of impacts: non-economic and economic. The non-economic impacts could be realized in social cohesion and integration of marginalized groups; constructing of a new value system; supporting the creativity and talents, the evolution of cultural diversity and national identity. Moreover, facilitating innovation. While the economic impacts appeared in stimulating economic growth, enhancing both foreign trade competitiveness and foreign direct investments (FDI), as we previously mentioned.

The objective of this study is to illustrate concepts, approaches, methodologies related to cultural economics. Particularly, shedding light on measuring approaches of the economic contribution of cultural industries, referring to these approaches in some selected countries. These countries are; UK, Finland, France, Germany, Italy, and Spain from Europe. Canada and USA from North America. Australia, China, and India from the Asia-pacific region. South American economic organization (MERCOSUR) countries for South America region. South Africa and Egypt from Africa region.

In light of the above, our study is divided into five sections, in addition to the introduction (Section I). Section(II) is devoted to Terminologies and Conceptual framework. Section (III) devoted to a brief literature review. Section (IV) discusses different measuring approaches of the economic contribution of cultural industries. Section (V) is devoted to the applications of these approaches in the selected countries previously mentioned. Section (VI) concluding remarks.

II. Terminologies and Conceptual Framework

We will begin with the conceptual definitions related to cultural economics. Figure (1) Illustrates the evolution of these concepts, followed by a brief discussion for each concept, with emphasizing on the most concern:

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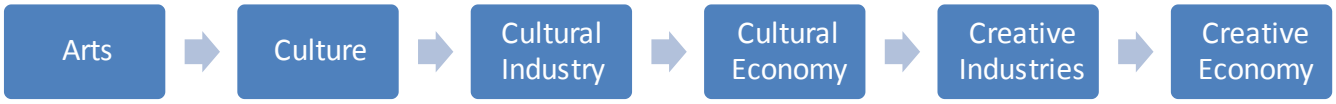
Figure 1: The Main Concepts Evolution of Culture Economics



Source: by the researcher based on: Canadian Heritage. (2013), The Creative Economy: Key Concepts and Literature Review Highlights, Edited by the Policy Research Group. Canada. May. Available at: https://cch.novascotia.ca/sites/default/files/inline/documents/creative-economy-synthesis_201305.pdf

a) Culture

Defining culture was a debatable issue[1]. In the sixteenth-century, culture was considered as enlightenment of society's mind and intellect[2]. Yet, in the nineteenth century, the "culture" term had been used in a broader sense, describing intellectual and spiritual development of society's civilization[3].

Some definitions of "culture" were so narrow as to be restrictive in light of phenomena description. While other definitions were broader, where "cultural" has two broader definitions: *first* is the anthropological or sociological framework, that describes "culture" as a set of attitudes, beliefs, mores, customs, values, and practices which are common to any group, this group may be defined in terms of politics, geography, religion, ethnicity or some other characteristics[4]. *The second* is functional definition; stated that "culture" has functional orientation, denoting certain activities performed by people, and the products of these activities, which are related to intellectual, moral and artistic aspects of human life. According to this definition, "culture" is related to activities that are devoted to the enlightenment of mind, rather than the acquisition of purely technical skills. The definition is more probably in "cultural goods," "cultural institutions," "cultural industries" or the "cultural sector of the economy"[5]. For our study, we will depend on the functional definition.

According to the functional definition; we can determine cultural activities as follows: the arts as traditionally defined: music, literature, poetry, dance, drama, visual art, ..etc. In addition, activities such as film-making, story-telling, festivals, journalism, publishing, television and radio, and some aspects of design[6] (Throsby, 2001).

Recently, the key role of the cultural sector has been emphasized and recognized for its importance in economic fields[7]. The researchers' interests in this field focused on measuring the socio-economic performance of the cultural sector. Furthermore, public perception continued to view the arts as a matter of enlightenment or entertainment, which may be led to a marginalized view of the sector in terms of its economic contribution, and thus limited the public view analysis. This limited view may explain the lack of statistical tools available to measure the economic contribution of the cultural sector (KEA, 2006).

[1] For instance, culture was described as "one of the two or three most complicated words in the English language." Borofsky also described culture as "akin to trying to engage the wind." So, "Culture" was a word employed in various senses in use, but without generally agreed core meaning. For social science, "Culture" was related to concepts of humanities and social sciences, but it was deployed without precise definition (Throsby, 2001).

[2] Such use of "culture" meaning is still in practice, where we refer to someone who is having well knowledge in arts as a "cultured" or "cultivated." And also, the noun "culture" is used without qualification, denoting products and practices of "high" arts (Throsby, 2001).

[3] The culture definition during this period focused on these characteristics for societies, such as nation- states. So, this humanistic interpretation of culture was set to become more expressed for the society's life and arts (Throsby, 2001).

[4] For example, Mexican culture, Basque culture, Jewish culture, Asian culture, feminist culture, corporate culture, youth culture, and so on. The characteristics which define the group may be established in the forms of signs, symbols, texts, language, artifacts, oral and written tradition, or by other means.

[5] For more accuracy to the second definition, the notion contained in the "culture" term could be derived from three suggested characteristics of the concerned activities, these characteristics are: (i) activities involve some form of creativity in their production. (ii) activities concerned with generation and communication of symbolic meaning, and (iii) activities that their output embodies some form of intellectual property. Yet, there have been debates among cultural economists about the classification of "culture goods," which are differentiated from "ordinary economic goods." (Throsby, 2001).

[6] Yet, an activity such as scientific innovation would not be involved in this definition because it is considered utilitarian rather than communicate the meaning. Moreover, road signs may give symbolic meaning but not considered cultural products. Organized sports festivals are ambiguous; some economists may find difficulties in accepting it as a cultural activity. Nevertheless, there can be little doubt that sport is an element of culture, which is a custom expressing shared values and as means of emphasizing group identity (Throsby, 2001).

[7] The 2006 KEA report; addressed The Economy of Culture in Europe, aimed to shed light on the culture sector's importance by showing how culture leads to economic and social development driven by innovation and cohesion. The UN report (2010) also referred that: "adequately nurtured, creativity fuels culture infuses a human-centered development and constitutes the key ingredient for job creation, innovation and trade while contributing to social inclusion, cultural diversity and environmental sustainability." This discussion revealed how expressive value is concentrated in the core creative fields, realizing how it extended to creative industries and the economy (KEA, 2006).

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b) Culture and Economics

As we previously discussed, and for the analysis objective, we will depend on the functional definitions of "culture" (p. 3). So, we can define the interrelationship between economics and culture as follows: the beliefs, attitudes, and values that bear on the economic activities of individuals, organizations, and other institutions[8] (Porter, 2000). Although the relationship between economics and culture was debatable[9], economic impacts of culture were evident. These impacts have three main paths: first, historical component, made by habits and values received from parents and earlier generations. The second, contemporaneous component, represented by beliefs generated by social interactions and networking (Marini, 2016; 2013). Third, evident in the direct and indirect economic impacts of cultural industries and their activities.

Another point we should mention is the broad literature of the relationship between culture and economics, which was later called "cultural Economics." The first step of "cultural Economics" as a discipline was established in 1965-1966, with the publications of Baumol and Bowen's titled: "On Performing Arts: Anatomy of their Economic Problems"; "Performing Arts: The Economic Dilemma." Later, Blaug pioneered the "economics of arts" in the 1970s, he started his work with comprehensive "cost- effectiveness analysis" to reveal the allocation of public subsidies for arts (King and Blaug, 1973). Blaug also gave the main contribution to what we called "cultural economics." He pointed out achievements, gaps, and desirable impacts of cultural economics on the economy[10]. He also confirmed the importance of analysis for costs and benefits to provide main framework for cultural policy. Moreover, Blaug stressed the special role of cultural economics for economic theory[11]. By 1976, It was evident that there was a new field of economics that was emerged when Blaug focused on economics of arts in a narrow sense[12], he referred to the exclusion of television and radio with a distinction between "entertainment" and the arts. A year later, the North American Academy established the Journal of Cultural Economics (JCE) (Handke and Dekker, 2013). By 2001, cultural economics began to cover an increasing range of "artistic phenomena" that justified the shift from "economics of arts" to "cultural economics"[13].

c) Cultural Industry (Industries)

The first use of the "cultural Industry" term was in 1947[14], describing arts and cultural goods that could be industrialized. This term was widely used in modern society's life, and it was picked up by French sociologists (UNESCO, 2012). Recently, "cultural industries" is converted to "creative industries" by policymakers (p. 9). Evolution the term "cultural industries," was made by shedding light on the production and consumption of cultural activities; especially arts, which are characterized as purely economic processes[15]. That is exactly the main issue of cultural economics.

[8] In this context, culture is considered different beliefs, such as religious creeds, social beliefs and norms, habits, and values transmitted over generations through social interactions and intergenerational transmission that influence individual decisions and policies of countries and regions. Nowadays, it is recognized that cultural types represent important determinants for the study of both individual decisions and macroeconomics (Marini, 2016; 2013).

[9] According to literature; some economists supported the direction of relationship from economic development to culture (Marx, 1859; Inghleart, 1990; 1997), while other economists suggested the reverse direction of impacts from culture to economic development (Banfield, 1958; Putnam *et al*., 1993; Fukuyama, 1995; Tabellini, 2010), and others stated that the relationship between culture and economics interpreted as bidirectional (Dasgupta, 2003).

[10] Blaug is better known for his work about the history of economic thought and economic methodology. Yet, his publications on the economics of art and culture illustrated his contribution in culture economics and its relationship with applied economics (Handke and Dekker, 2013).

[11] Blaug was affected by Austrian Karl Popper; he believed in the cultural sector as a type of Australia, a foreign place where black swans dwell. Moreover, Schumpeter also gave inspiration to Blaug; he argued that the topics of innovation, entrepreneurship, and Schumpeterian competition should have a central role in economics (Handke and Dekker, 2013).

[12] Arts in a narrow meaning are: "opera, ballet, modern dance, orchestral concerts, theater, museums and galleries, but unfortunately not television, radio and films, and not jazz or pop music." Blaug explained the exclusion of television and radio with a distinction between entertainment and the arts. He concedes immediately that this distinction may be "artificial and conventional," but it is necessary to avoid the inclusion of spectator sports, which would leave the scope too broad. The film is excluded for a different reason: there were no concise economic studies available. Jazz and pop music are excluded because of the "deplorable" lack of interest of professional economists for these topics at the time. Cultural economics continues to struggle with the definition of the arts, the cultural, creative industries, or entertainment industries to this day. Moreover, Blaug's solution was by admitting the absence of definite criterion (Handke and Dekker, 2013).

[13] Blaug (2001) emphasized advances in economic theory to cover more comprehensively the full range of "outlets of artistic creativity." So, he focused on the branch of cultural economics that use a broader, the anthropological definition of "culture," emphasizing norms and values (Klamer, 1996; Throsby, 2001). As we previously discussed (p. 3).

[14] Frankfurt School of Sociology pioneered the "cultural Industry" term, Particularly in criticism of economization of art by Adorno and Hokeimeir book: "Dialectic of Enlightenment," which described cultural industry as an art, and cultural goods that could be industrially multiplied (Throsby, 2001; UNESCO, 2012).

[15] According to this evolution, the root of cultural economics was established as a distinctive discipline in economics. Since then, cultural economics had its economic classification, and also had its international association, congresses, and journal (Journal of Cultural Economics (JCL)) (Throsby, 2001).

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Later, cultural economics researches have been conducted, with expanding theoretical and applied literature framework in both cultural industries and their economic impacts (as we will discuss in part III). These researches traced the modern origins of Galbraith's first writings of economics and art in 1960, also Baumol and Bowen's work in 1966[16]. In this tradition, cultural industries were interpreted using traditional tools of economic analysis, with some adaptations for the features of cultural demand and supply[17]. According to this approach, cultural industries could be integrated into wider economic models, such as an input-output models, with taking into account relationships between culture and related industries and sectors.

The main idea of these thoughts was that commodification of culture does not crowd out other activities of cultural production and industries. So, the economic view of culture and cultural industries is simply accepted as producing and consuming cultural goods and services within an economic system that is involved in economic transactions, and hence cultural industries could be economically measured and analyzed (Throsby, 2001).

Many types of research have been conducted to make a significant contributions for modeling cultural industries to measure their economic contribution. The baseline of these researches was related to the traditional structure of art, based on criteria of aesthetics theory (Adorno, 1998). A broader perspective added some criteria from the industrial field such as cultural levels and economic value (Throsby, 2008), interactions of the creative workforce (Higgs *et al.,* 2008; Florida, 2004), industrialization level of production (Hesmondhalgh, 2002), and effects of technical progress (Boix *et al*., 2010).

The researchers also revealed two types of the culture industries' impacts; The non- economic and economic impacts. The non-economic that cultural industries have on social development can be realized in the social solidity and integration of marginalized groups (Council of Europe, 1998; Matarasso, 1997); building of a social values systems (Ingelhart, 2000); creativity, talents emphasis (Throsby, 2001; UN,2010); development of cultural diversity, national identity (UNESCO, 2005; Herrera, 2002; Throsby, 2001), facilitating creativity and innovation (ABS, 2001; Cox, 2005; Potts and Cunningham, 2008; Bakhshi *et al*., 2008). The economic impact could be evident in the increasingly important components of cultural industries to modern economies and knowledge-based society, due to their impacts on the economic development (UNESCO, 2012).

By the end of the 1990s, researches conducted in developed countries revealed that cultural industries stimulate Gross Domestic Product (GDP) or Gross Value Added (GVA) and employment; and also have main characteristics as a leading sector, that can stimulate economic growth[18]. The growing interest in cultural economies give a key component for cultural industries in formulation of economic policy development. In this regard, there is a growing tendency in several countries; particularly in developed countries, to include different cultural industries aspects (production capacity, creative classification, cultural facilities, etc.) in measuring economic development and economic growth.

In recent decades, there was a greater understanding and measuring of the economic importance of cultural industries. It has become clear that these industries impact GDP, GVA, employment, and economic growth rates. Moreover, they can enhance a country's foreign trade account and competitiveness, contribute to the regeneration of creative cities and attract investments. That was evident in researches that revealed the significant impact of cultural industries on the economy by enhancing economic growth and economic development (Lash and Urry, 1994; Jensen, 1999; Pine and Gilmore, 1999). These trends in economics are represented new terms; "culturalisation," (Ellmeier, 2003) or "creativisation" (Rikalovic and Mikic, 2011). Moreover, researchers shedding light on the central role of the cultural sector as a base of creative economy (UNDP, 2010; Howkins, 2001; Florida, 2002; Conference Board of Canada, 2008).

So, by the first decade of the 21st century, cultural industries became one of the most dynamic sectors of the global economy, with their expected enhancing for GDP growth. Later, the "cultural industries" term was converted to "creative industries"

[16] The first prominence of cultural economics as a discipline of economics was in 1960, with Galbraith's book entitled: "The Liberal Hour," and also the work of Baumol and Bowen in 1966, entitled: "Performing Arts: The Economic Dilemma." Since then, several well specialized researches have appeared in this field, and there was an expanding theoretical and applied literature in cultural economics in academic journals (Throsby, 2001).

[17] Artists' work is considered as an incident in the labor market, and so, these activities could be analyzed using economic concepts such as labor supply and profit functions. Yet, the predictions of behavior differ from the expected because of the special nature of artists (Throsby, 2001).

[18] The researchers in this field suggested that some cultural sectors (e.g., designs) can provide spillover economic impacts; and also could achieve a high-quality workforce, business, and investment, and stimulate creativity and innovation across all sectors of the economy, which may led to reinvestigate the role of cultural industries' in the and changes of the economies (UNESCO, 2012).

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by policymakers[19] (Hesmondhalgh, 2002; Throsby, 2010; Pratt, 2005).

d) Creative Economy and Creative Industries

Howkins pioneered the "creative economy" definition in 2001 who defined the creative economy as "the transactions of creative products that have an economic good or service that results from creativity and has economic value" (Howkins, 2001). Yet, the most used definition was by the UK Department of Culture, Media and Sport (DCMS), which defined the creative economy as "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property" (DCMS, 1998).

Recently, the United Nations Conference on Trade and Development (UNCTAD) defined the creative economy as a developed concept based on creative assets, and potentially generating economic growth. According to this definition; a creative economy can enhance income generation, employment, and export revenues with promoting social inclusion, cultural diversity and human development. Moreover; the creative economy also includes economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives and It is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy, It is a feasible development option for innovation[20], multidisciplinary policy responses and inter-ministerial action, and the creative industries become at the core of creative economy (Canadian Heritage, 2013).

For expanding view of the creative economy, we will briefly discuss "creative industries" term, which used for shedding light on the role of creativity in economic life, and stating that economic and cultural development are not isolated, but actually, it represents a part of a larger process of social and economic development.

The "creative industries" term was initially used in 1994 by the Australian Report entitled Creative Nation[21], and widely used in 1997 when policymakers of the UK's DCMS established the Creative Industries Task Force (CIFT)[22]. Since then, the relationships between the art, culture sector, and creative industries were debatable. Arts are generally understood as activities and institutions that are subject to public-funded, such as galleries, concert halls, symphonies, and literature (Canadian Heritage, 2013).

In the same context, Scotland's Government suggested that traditional performing arts and cultural organizations are increasingly being involved in the creative content dimensions of the creative economy, especially the playwrights, musicians, and a host of performers, who become more interested in their intellectual property rights, using the social and broadcast media (Knell and Fleming, 2008). This illustrates that most artists move between various projects, businesses, values, aspirations, techniques,

[19] By 2000s, researchers estimated that the creative sector share of the world's GDP was 7.3% (Howkins, 2001) and with an average growth rate of international trade of 8.7% during the period 2000-2005(UNCTAD, 2008). These tendencies, together with changes in broader economic environment and consumption, gave the view of increasing growth of cultural industries in some countries, comparing to other traditional industries (UNESCO, 2012).

[20] The "creativity" term appeared in the 20th century by educational theory and psychology, particularly in models of artistic practice and perception, to suggest different forms of learning and understanding. With knowledge economy, Florida and Howkins were placing this knowledge under the banner of the "creative class" and "creative economy" by the 1990s (Oakley, 2009). At the same time, the research provided evidence for linked relationship between creativity and innovation. Oakley, et al. in the NESTA report identified three main ways in which artistic labor is linked to innovation, as follows: Artistic labor has the attitudes and skills that are adopted to innovation. Artistic labor is affected by innovation through the widespread "culturalisation" of activities – as cultural ideas and images become a part of non-cultural products and services. Artistic labour also provides content that is required for "artistic creativity." More recent research, the Nova Scotia Cultural Action Network in 2009, revealed that arts and cultural industries are stimulating the economy in three ways: first, by driving innovation through core creativity and cultural industry activities. Second, by driving the economy through wealth creation. Third, by positively impacting the quality of life in a given region, which in turn attracting more innovators.

[21] The concept of creative industries pioneered in Australia in 1994 with the report "Creative Nation: Commonwealth Cultural Policy" (DCA, 1994), where it was discussed in the context of art and communication technology. This concept was accepted at the end of the decade. The spread of the liberal cultural policy in the UK during the 1990s also contributed to stimulating creative activities. Moreover, the interactions between culture and technology became complex, and traditional understanding was not broadly enough to analyze relationships between creativity, cultural value, technology, and their impacts on the economy (UNESCO, 2012).

[22] The first use of the "creative industries" term was in 1997 by the UK government; with the establishment a Creative Industries Task Force (CITF), as a center of the Department of Culture, Media and Sport (DCMS). The Creative Industries Task Force set mapping of activities related to the UK creative industries, for trying to measure the contribution to UK's economy (Flew, 2012). In 1998, The UK Creative Industries Mapping Document defined the creative industries as those activities which have their origin in individual creativity, skill, and talent and which have the potential for wealth and job creation through the generation and exploitation of intellectual property (DCMS, 1998). The DCMS identified 13 sectors as constituting the creative industries, these activities are: Advertising, Architecture, Arts and antique markets, Crafts, Design, Designer Fashion, Film and video, Interactive leisure software (electronic games), Music, Performing arts, Publishing, Software and computer services, television and radio (DCMS, 1998). This mapping was broadly repeated in 2001 (UK, DCMS, 2001). The Creative Industries Mapping Document identified the creative industries as constituting a growing component of the UK economy in 1998, employing 1.4 million people and generating an estimated £60 billion a year in economic value added, or about 5% of total UK national income (DCMS, 1998; 2001), particularly in London, the contribution of the creative industries was even greater comparing with other parts in UK, accounting directly or indirectly for about 500,000 jobs, and about 20% of new jobs created, with an estimated value added about £21 billion, this made creative industries London's second-largest economic sector after financial and business services in 2006 (Knell and Oakley, 2007).

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and products in the day-to-day aspects of their career (Australia Council for the Arts, 2020). Conference Board of Canada also suggested growing understanding and appreciation of relationship between arts, cultural industries, and society. This relation gives creative economy extends beyond the culture sector to bring positive social and economic changes in industries, sectors, and social organizations (Conference Board of Canada, 2008).

This new term; creative industries, expanded the scope of what was generally considered as "cultural industries," to exceeded arts to potentials of commercial activities (UNCTAD, 2004), what we can be agreed on is that creative industries located in the center of a broader term; that is the creative economy.

For determining our basic terminologies and conceptual framework that are in consistent with our research objective (p.1), we agree on using of the functional concept of culture that we previously referred (p. 3). Moreover, we will use the "cultural industries" term to review measuring approaches of the economic contribution of these industries, while measurement of contribution for broader terms as "creative industries" maybe suggested for other future studies.

III. Literature Review of Measuring the Economic Impacts of Cultural Industries

The literature of measurement economic contribution of cultural industries is evident in developed countries, other than the rare research for developing countries, Particularly in Africa, as we will discuss later(p. 20; p. 24). There was a lack of measurement of the economic contribution of cultural industries till the 1960s[23]. Yet, by the 1980s, the research emerged driven by the conducted analysis on the relationship between cultural industries and economy[24] (as we previously mentioned in part II), focusing on the quantification of the economic impact of cultural economics on both economic development and economic growth[25].

Since the 1990s, the research interests focused on regional issues or for solving global problems related to intellectual property rights. Later, researchers emphasized on the evolution for the economic measures of economic contribution of cultural industries. In the same context, Anglo-Saxon urban researches were focused on the economic development of cities on cultural industries. These thoughts enhanced the methods and techniques of research in measuring cultural industries' contribution.

Moreover, some researchers discussed the evolution of cultural industries, which may stimulate effective demand in the short run by attracting visitors and local consumers to cultural areas (Bille and Schulze, 2006). Other researches revealed the long-run impacts, driven by attracting firms to invest in the cultural sector (Heilbrun and Gray, 2004). Moreover, cultural industries cluster had also an increasing interest in conducted researches (Hervas- Oliver *et al.*, 2011).

Most researchers focused on the indirect measurement of the economic contribution of cultural industries, other than the direct measurements. Moreover, they also investigated interactions between the cultural sector and other sectors and industries (UNESCO, 2012). While other researchers revealed the role of supply chain linkages (Bakhshi *et al.*, 2008), they also referred to structural relationships in labor markets between cultural and non- cultural sectors (Shafi *et al.*, 2020; Higgs *et al.*, 2008).

IV. Measuring Approaches of the Economic Contribution of Cultural Industries

The economic measurement of cultural industries' effects has different approaches, which include several terminologies and indicators[26]; as illustrated in figure (2), followed by brief distinction for these terms.

[23] There were three reasons for research scarce during this period until the 1960s: first, lack of a statistical data for cultural industries, driven by a view to culture and cultural industries as a new economic discipline. Second, the lack of measurement analysis approaches that could be applied for cultural industries. Third, the debatable relationship between cultural industries and economics, driven by the traditional view of economic analysis, that did not make consistent with the nature of cultural industries and their activities.

[24] Prior 1980s, economic impact studies have been conducted on cultural industries in ehe USA to support arguments for public financing of culture, education, and other social science activities (UNESCO, 2012).

[25] Economic impact studies during this period responded to demand for justification of public financing to cultural activities. This issue had two explanations in the USA: first, the long-established interests of state and local governments in stimulating economic growth. Second, the attitude of "show me in dollars and cents" of local businesses and investors, who had the main subsidy supports for arts and cultural activities (Heilbrun and Gray, 2004).

[26] The measuring approaches of cultural industries' contribution refers to the analytical methods, practices and tools used for collecting, presenting, and interpreting information related to the economic contribution of cultural industries (UNESCO,2012).

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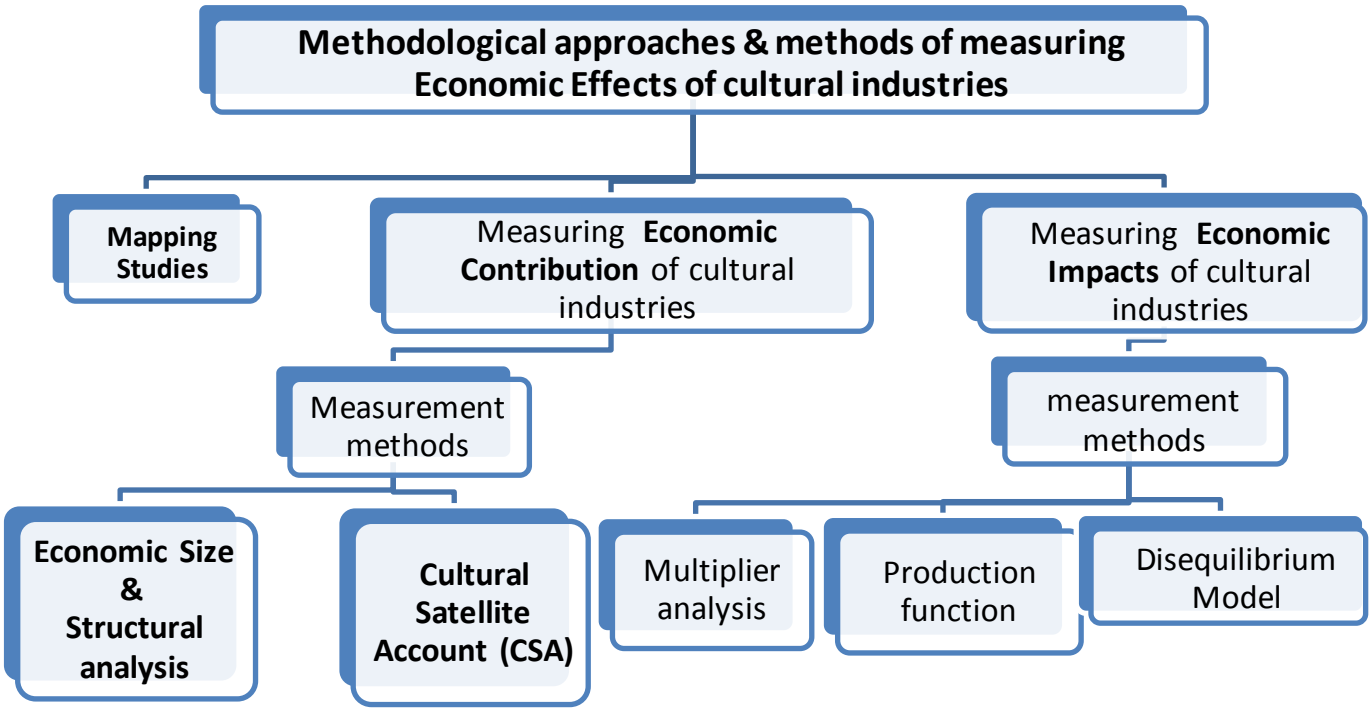
Figure 2



Source: by the researcher based on; UNESCO, 2012

(i) Mapping studies provide an overview of industries, economic value, particularly in industrial sectors that relatively have lack of data about their activities, such as the cultural sector[27]. This approach helps in the data gathering process. Yet, it is not sufficient for measuring the economic contribution or economic impact of cultural industries. (ii) Economic contribution of cultural industries refers to quantification of economic aggregate changes resulting from cultural industries. This concept, also called the economic importance, is static and descriptive, according to its variables and indicators, which are used in the measuring process. These variables and indicators such as Gross value added(GVA), Gross Domestic Product (GDP), employment[28]. (iii) Economic impact is a more dynamic concept, which referred to real and potential changes in one variable, driven by changes in another. More precisely, the economic impact measures the net financial flows (Maddden, 2001) and strong effects of changes in variables on economic factors, such as consumers, firms, markets, and income (Radich, 1987). Moreover, economic impact reveals the direct and indirect effects of different cultural activities (Bille and Schulze, 2006; Helibrun and Gray, 2004)[29]. So, this concept can be used at both micro and macro levels. At the micro level, we can use it for studying the short-run impacts of investment in cultural sectors. While at the macro level, we can investigate the impact of cultural industries' activities on other industries, sectors, and therefore effects on the economy.

In light of the above, we can divide the methods of theses methodological approaches two branches: *first,* for measuring the *economic contribution* of cultural industries, that includes two methods: economic size and structural analysis, and cultural satellite accounts (CSA). *Second,* measuring the *economic impact* of cultural industries, which includes three methods: multiplier analysis, production function, and disequilibrium model (UNESCO, 2012).

[27] Mapping studies approach emerged in cultural economic field by the UK Department of Culture, Media and Sport DCMS studies (UNESCO, 2012), previously referred to in part (II).

[28] The economic contribution as a concept had different interpretations in the literature studies. Some researchers defined "contribution" as the economic impact in terms of income, expenditure, and value-added that generating from sectors to the economy (Jura Consultants, 2008). Watson et al. referred to the economic contribution as the aggregate changes in the economic activities of an industry or net changes driven by a new policy in a certain economy (Watson et al., 2007). Thorsby was more precise; he defined the economic contribution in the cultural economics as a basic approach for measuring the economic effects of cultural industries (Throsby, 2010).

[29] Watson *et al.* defined economic impact as net changes in the economic activities of an industry, or net changes are driven by a new policy in an economy (Watson *et al*., 2007). Thorsby defined economic impact as a concept that has a higher level of analytical insight that can reveal paths which output can be produced and distributed in the economy, and also concluding direct and indirect effects on other related sector in the economy (Thorsby, 2010).

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According to our best knowledge, the methods of the first methodology, economic contribution, did not get sufficient research interests[30]. So, for filling the research gap, we will focus on these measurement methods in our discussion. Where these methods give us a broader view of the main and aggregate economic contribution of cultural industries and activities, and also these methods are consistent with our research objective (p. 1). Moreover, measuring the economic contribution of cultural industries at the international level gives the ability for countries to estimate potentials about the evolution of culture industries that are consistent with their society's capabilities and interests. So, we will briefly discuss the methods of the first methodology approach; (i) Economic size and structural analysis. (ii) cultural satellite accounts(CSA).

a) Economic Size and Structural Analysis

The main objective of this method is to determine interrelationships and interactions between economic activities and cultural industries, using estimates derived from Satellite National Accounts (SNA), for measuring the direct economic contribution of cultural industries. These estimates, which are relevant to macroeconomic aggregates, are as follows: gross value added (GVA), gross domestic product (GDP), the gross value of production(GVP), employment, fixed capital formation, and foreign trade[31].

According to this method, we can distinguish between two sorts of analysis: the economic size analysis and the structural analysis. The economic size analysis provides a general view of the economic roles of cultural industries. This analysis includes all components of all economic sectors and also focusing on the economic effects of cultural industries in the long run[32]. Second, the structural analysis, which could be separately conducted, or could be applied as a part of economic contribution studies. This analysis includes different techniques for studying the structure of cultural industries[33]. The structural analysis is not limited to data description; it is rather considered as an interpretation of specific policy, markets, and economic aspects[34].

These two analyses are used not only for measuring long term contributions of cultural industries but also to measure the short term contributions by investing the performance of cultural industries' business, based on operational indicators of business, such as turnover ratio, sales, revenues, profits, number of enterprises, etc.

According to these analyses, macroeconomic variables are used to estimate indicators that are used to specify the economic contribution of cultural industries. The objective of these indicators is to provide reliable measurements for the decision-making process in the culture industries' policy. The main three indicators are as follows (UNESCO, 2012):

(i). Gross value added (GVA): which includes three measures: gross value added as a share of GDP of cultural industries, in absolute terms[35]. Gross value add as a share of the culture of GDP of culture industries, in relative terms[36]. Distribution of gross value added as a share of GDP by sub-sectors[37].

(ii). Employment indicators, which includes four measures: contribution of cultural industries' employment to total employment[38]. Distribution of employment in the cultural industry sector[39]. Volume and share of self-employment[40]. Labor productivity in the cultural industry sector[41].

[30] Economic analysis methodologies focused on firms and industries levels, reaching the whole economy level. It was evident that cultural economists were mostly relevant to microeconomics analysis rather than at the macroeconomic level (UNESCO, 2012).

[31] According to this method, macroeconomic aggregates of the culture sector are relatively compared with the size of other sectors in percentages values. This method applied in the case of Germany, Queensland, Australia, and Finland (UNESCO, 2012).

[32] Regional economic analysis referred to economic size analysis as contribution analysis(Watson *et al.,* 2007). Yet, the "size" term could be more appropriate to reflect the main objective of this analysis, that determining the economic size and share of cultural industries of an economy (UNESCO, 2012).

[33] This analysis concerns with different stages of the value chain, with interest in the distribution of macroeconomics variables by sub-sectors, groups of stockholders and consumers, such as authors, producers, distributors.

[34] Several types of research referred to structural analysis with other names, such as value chain analysis and cluster analysis. Value chain analysis identifies the relationships between different stages of the value chain in culture industries. Cluster analysis sheds light on the competitiveness of culture industries and their relevant factors, based on four basic factors analysis: strateg ies of firms and their competitors, demand market, supporting industries, and factor conditions (Porter, 1990).

[35] Calculated by dividing the gross value added over GDP of cultural industries in absolute terms (UNESCO, 2012).

[36] Calculated by dividing the share of cultural industries in gross value added over GDP of the total economy, in relative terms (%) (UNESCO, 2012).

[37] Calculated by dividing the share of culture industries of sub-sectors in total gross value added over GDP of cultural industries, in absolute and relative terms(UNESCO, 2012).

[38] Calculated as a share of cultural industries' employees to total employment in the economy, in relative terms(%) (UNESCO, 2012).

[39] Calculated as the share of cultural industries sub-sector employment to total employment of cultural industries sector, in absolute and relative values (UNESCO, 2012).

[40] Calculated by dividing the number and share of self-employment jobs in cultural industries sector over the total self-employment jobs in the economy(UNESCO, 2012).

[41] Calculated as Gross value added (GVA) in cultural industries per employee(UNESCO, 2012).

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(iii). Business activity indicators, which include six measures: stock of business[42]. Distribution of business by sub sector[43]. Business startups[44]. Business mortality[45] measurement[46]. Distribution of startup business by sub-sector[47]. Distribution of business mortality[48].

b) Cultural Satellite Accounts(CSA)

The main purpose of satellite accounts systems (SAS)[49] is to measure the economic importance degree of a specific industry. Cultural satellite accounts (CSA) statistically measure the economic contribution of cultural industries in a certain economy[50]. CSA also includes both demand and supply sides of cultural industries, based on the Input-Output matrix. It also includes aggregates variables of GDP, intermediate consumption, value-added, and employment. Yet, the investment in cultural sectors is not included because of lack of data about industry classifications in many countries (UNESC, 2012), which made difficulties in using CSA for measuring the economic contribution of cultural industries.

Recently, cultural satellite accounts CSA based on input-output tables, derived and modified to capture the economic contribution of cultural industries (Australia's CSA), or by especial preparation of input-output tables for cultural activities, which based on empirical research about sectorial interrelationships (Colombia's CSA).

Although widely used, the CSA system faces serious applied problems: First, identification of these industries that are considered as cultural industries, therefore, should be included in CSA[51]. Second, availability of data about Both supply and demand sides for constructing CSA[52]. These problems make serious difficulties for using the (CSA) systems in practice at the national level, and also for international comparisons purposes.

V. Measuring Approaches in some Selected Countries

In this part, we will discuss approaches of measuring the economic contribution of cultural industries in the selected countries (p. 1). The objective of this discussion is to clarify two main points in the selected countries: *First,* differences in concepts and activities that include cultural industries. *Second,* approaches and measures for the economic contribution of cultural industries. The selected countries widely cover different geographical regions. Moreover, they are regionally and internationally the most important countries that realized the importance of cultural industries. Therefore they have considerable literature in this field, and also they applied different modern approaches for measuring the economic contribution of culture industries. These selected countries regionally classified are as follows: UK, Finland, France, Germany, Italy, and Spain from Europe. Canada and USA from North America. Australia, China, and India from the Asia-pacific region. South American economic organization (MERCOSUR) for South America region. South Africa and Egypt from Africa region (Appendix A. 1; A. 2).

First: Differences in both concepts and activities, including in cultural industries in the selected countries

The selected countries have various definitions and classifications of cultural industries (Appendix, A.1). This variation led to changes in the scope and perspectives of researches that measure the economic contribution of cultural industries.

Based on the UK classification model, European selected countries agreed on concepts and activities of cultural industries, with conducting initial modification,

[42] Estimated with the number of businesses by size in cultural industries (UNESCO, 2012).
[43] Estimated with the number of businesses by size in cultural industries sub-sectors (UNESCO, 2012).
[44] Estimated with the number of new businesses in cultural industries per 10,000 persons (UNESCO, 2012).
[45] Business mortality occurs in the year when the firm stops reporting sales. This definition is similar to the Bureau of Labor Statistics Business Employment Dynamics measures, which include mergers, acquisitions, and industrial reclassification (Daepp *et al*., 2015).
[46] Estimated with the number of locked businesses in cultural industries per 10,000 persons (UNESCO, 2012).
[47] Estimated with the number of new business in cultural industries sub-sectors per 10,000 persons (UNESCO, 2012).
[48] Estimated with the number of locked businesses in cultural industries sub-sectors per 10,000 persons (UNESCO, 2012).
[49] The satellite account systems (SAS) represent an extension of the system of national accounts (SNA). The (SAS) measure the economic contribution of specific industries, particularly in sectors and for activities that are relatively not observable in traditional (SNA). Such sectors and activities as tourism sector, sports sector, and activities, nonprofit sectors.
[50] Lemair Pioneered the conceptual framework of cultural satellite accounts (CSA) for the French National Institute of Statistics and Economic Studies (FNISES)(The Ministry of Education, Finland, 2009). Recently, the (CSA) systems for measuring the economic contribution of cultural industries are widely used in most MERCOSUR countries; Argentina, Brazil, Paraguay, and Uruguay, and also used in some EU countries such as Finland, Spain, and UK (Experian, 2007).
[51] This represents a serious problem for using (CSA) in practicing, that is due to inclusion or exclusion small supply of cultural industries in (CSA). Yet, industries that partially have cultural products and services should be only included the share of their production that considered cultural products and services in the (CSA). These may arise both conceptual and measuring problems.
[52] In UK, the calculation of input-output tables is based on 123 products and industries. In Finland, this calculation is based on 90 products and industries. While in France, calculations are based on 114 products and 116 industries. In Australia, input-output tables are based on 106 products and industries; while in Spain, calculations are based on 75 branches of activities and 118 groups of products… etc. depend on industry development, and its diversity in each country (UNESCO, 2012).

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according to their local needs. Their cultural industries concepts mostly include activities such as: Architecture, film & video, broadcasting (radio & TV), performing arts (theatre, dance, festivals), publishing, music industry, and Advertising. While some other activities, such as sports industries, audio industry, botanical gardens, and zoos, education & training is more included in cultural industries classification for selected European countries, Finland and Spain (Appendix, A. 1). Moreover, some cultural activities are sometimes included in both the culture sector and other sectors[53].

For the North America region, the two selected countries; the USA and Canada, almost agreed on cultural industries activities, that include: Architecture, film & video, broadcasting (radio & TV), performing arts (theatre, dance, festivals), publishing, music industry, audio industry, Advertising. While some other activities, such as sports industries, botanical gardens, and zoos, education & training, are not included (Appendix, A. 1). Yet, the definition of arts in the USA includes art councils and cultural organizations that have a non-profit orientation and also have their independent budgets. In the same context, the definition of creative industries in the USA focused on businesses involved in the production or distribution of art products (for-profit and not-for-profit). This definition implies that creative industries include art councils, government agencies, museums, art or science centers, art galleries and art schools (non-commercial), symphony orchestras, theatres, opera companies, performing arts center productions, ballet productions, dance studios, schools and halls, theatre building, ownership, and operation. This concept excludes industries that are creative but not focused on the arts (e.g., computer programming and scientific research (Appendix, A. 1). Another concept in the USA is copyright-based industries, which includes four industries: core copyright industries, partially copyright industries, distribution, and copyright-related industries[54].

Canadian cultural activities concept is based on the stages of the creative chain model. These stages are creation, production, manufacturing, distribution, and support activities[55]. Moreover, Canadian cultural activities are identified according to the level of culturality, including in products. The core of cultural products is that entire cultural chain, and their primary purpose is the transmission of intellectual concepts (Statistics Canada, 2004).

Asia-Pacific region definition of cultural industries based on a combination of UK and UNESCO perspectives and it was established within the "Jodhpur Initiatives." This definition considers cultural industries that produce tangible or intangible artistic and creative outputs, and that have a potential for wealth creation and income generation through investing in cultural assets and production of knowledge-based goods and services (UNESCO, 2005). In this region, most of the selected countries are using creative industries term (Australia, China), which includes broader activities such as: Architecture, Broadcasting (radio & TV), Performing Arts (theatre, dance, festivals), Designs (product, fashion, festivals), Visual arts and art market, Publishing (book, press, journals), The music industry, Software, computer games and multimedia, Internet access providers, Advertising, Jewellery, crafts, and related activities. other than India's cultural industries term; Media & entertainment industries, which only includes activities such as Film & Video, Broadcasting (radio & TV), Music industry, Advertising (Appendix, A. 1).

For MERCOSUR countries in the South American region, the cultural field is used for expressing a broad and dynamic concept, which includes not only activities that produce goods and services with symbolic meaning and value, but also includes broader activities such as artistic training, because these can play a role in the generation of symbolic content (Appendix, A. 1). According to the CSA of MERCOSUR countries, culture production divided into 12 sectors and several sub-sectors, as follows (i) artistic creation (literary, drama, music, etc.); (ii) performing arts (theatre, dance, live music, etc.); (iii) visual arts (photography, sculpture, graphic arts, industrial arts ..etc.); (iv) books and publishing (books, periodicals, other publications); (v) audio- visual (film and video, radio and television, video games, etc.); (vi) music (music publishing and music recording); (vii) design (architectural, industrial, graphic, textile, fashion, accessories); (viii) games and toys; (ix) tangible heritage (museums, libraries, heritage institutes, etc.); (x) natural heritage (botanical gardens and zoos, natural reserves, etc.); (xi) intangible heritage (festivals and fairs, local languages, cuisine and local culinary traditions, etc.); and xii)artistic training (UNESCO, 2012).

In African selected countries, cultural industries have a common term, and it is usually including activities such as music industry, crafts, film and television, and the publishing industry (Ghoneim, 2002)[56]. cultural

[53] These activities such as tourism and cultural tourism, sports, and recreation.

[54] Since 2006, this definition has been followed to achieve international standards proposed by World Intellectual Property Organization (WIPO) in 2003, regarding the development of economic and statistical standards to measure impacts of domestic copyright industries (Siwek, 2006).

[55] Creative chain model consists of an initial creative idea, which is usually combined with other inputs to produce a cultural good or service that then goes through a series of interlinked stages to reach the user. Cultural goods and services in the creative chain model are represented as hierarchical models, that distinguishes between basic and dependent goods and services, depending on the primary purpose of final product (Statistics Canada, 2011).

[56] Ghoneim tried to measure the importance of cultural industries in Egypt. According to his study, the core activities of cultural industries

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industries in a broader sense may include cross-cutting sectors, such as cultural tourism, design and fashion, heritage, gastronomy.

In Africa, cultural industries are represented as interdisciplinary between traditional knowledge, arts, and creative economy. They are organized as household units, working in informal groups. Most the cultural production in some African countries occurs in an informal economy, and this is often the only source of income (UNDP, 2008). In other countries; e.g., South Africa, cultural industries are highly diverse and also characterized by their structure of small firms and concentrated in urban areas (UNECO, 2012).

Second: The main approaches and measures for the economic contribution of cultural industries in the selected countries

There are different approaches using for measuring economic contribution of cultural industries across the selected countries. These approaches varied between economic size and structural analysis, cultural satellite accounts (CSA), value chain analysis by sub-sector, Input-Output matrix, and satellite account creative sector sub- model. All these approaches depend on mapping studies, driven by information availability about the cultural sector (Appendix, A. 2).

In European selected countries, the DCMS model was applied in mapping studies of the UK by the 1990s, based on the value chain concept. This concept includes the creation, production, manufacturing, and distribution of cultural content. Therefore, the value chain model was used as a type of economic analysis[57]. Moreover, the Finnish model depend on the culturality of goods and services to implement a value chain approach (Ministry of Education, Finland, 2009).

Instead of the value chain model, three-sector model was applied in Germany. These three sectors are private, civil, and public property & management rights. According to this model, measuring the economic contribution of the culture sector, is focused on private sector or market-oriented businesses, and all sub-sectors related to cultural activities (UNESCO, 2012).

Another approach is employment-based, which measures direct and indirect employment in creative occupations for all industries. According to this approach, There are two ways for measuring the contribution of cultural employment to economic growth: first, measuring the impact of cultural activities and concentration of creative class on economic growth. Second, the trident model, which is used for measuring direct and indirect employment in cultural industries, applied in UK and France.

In European selected countries, three main measures are used to measure the economic contribution of cultural industries; these are gross value-added, employment, and the dynamics of business in cultural industries. These economic measures are used in both quantitative and qualitative way and are mainly based on data derived from Satellite National Accounts (SNA).

Economic size and structural analysis was also the main methodological approaches in the selected European countries, which devoted to estimating the direct contribution of cultural industries on macroeconomic aggregates such as GVA, GDP, employment, trade, export, and import) (Appendix, A. 2). This analysis is also combined with structural analysis, based on the availability of data. Moreover, structural analysis is sometimes combined with value chain analysis for explaining the structure and function of different stages of the value chain in cultural industries (UNESCO, 2012).

In the UK, a new model I-O matrix for the cultural sector was constructing in 2007, based on a combination of input-output data. The primary objective of such analysis was to investigate the linkages between cultural sector and the economy in the UK. This kind of analysis is very rare in European countries due to the extensive process of data gathering.

Another method for measuring the economic contribution of cultural industries is cultural satellite accounts (CSA). It was developed in Finland and Spain. In Finland, (CSA) was evaluated in 2005. later, a calculation model for measuring the economic contribution of culture was created. Then, in 2007, a culture satellite account survey was constructed with a computational framework for cultural satellite accounts[58] (Ministry of Education, Finland, 2009). While in Spain, measurement framework focused on gross value added, the contribution of the cultural sector to GDP, employment, number of firms, net sales, etc. as well as on distinction between private and public sector in measuring economic contribution of cultural and leisure industries, based on anthropological activities such as sports, bullfighting, amusement parks, fairs, lotteries,

were as follows: Book Publishing Industry (BPI), Music Sound Recording (MSR), Film Production Industry (FPI), Software Industry (SWI) (Ghoneim, 2002).

[57] Value chain model had difficulties because national statistics definition of cultural industries that included certain activities at a different level of aggregation. Moreover, this model included different activities (e.g., zoo and botanical garden, wine and food industries), or several stages of the value chain, depending on tradition of cultural sector classification, which may include or exclude dependent activities, such as art agents and auxiliary activities.

[58] This was a very important step in this field, that Finnish CSA input-output matrix is based on 60 products and 60 industries out of 90 products and industries included in the SNA and I-O table of the Finnish economy. Yet, the Finnish CSA concept did not include voluntary work, original works of art, general cultural administration, outsourcing, the demand of culture by companies, crafts, games, religious organizations and military bands, open-source activities, education, folk high schools, and Colleges, design, and sport.

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gaming and toys (Ministry of Culture Spain, 2007), these activities provided estimations of economic value and contribution of culture. It was the basis for the development of culture satellite accounts in Spain, published in 2010. The Spanish CSA model is based on a combination of cultural activities and activities related to intellectual property. While cultural activities are the key of this model, it also includes cultural-related activities that are not strictly cultural but essential for the understanding the creative sector as a whole (Ministry of Culture Spain, 2009).

Although these efforts, data limitation is still the main problem in most European countries. As statistics for cultural industries and statistical methodologies have not yet been harmonized in a systematic manner, economic measures of cultural industries can only be interpreted in their local and regional contexts. However, these measures can be effective for analyzing certain areas of cultural industries and their contribution to economic growth; they are still not enough as measures for cultural industries' contribution. That may lead to suggest the need for more elaborate evolution to new common concepts and measurements of the economic contribution of cultural industries to be more comparable at both regional and international levels.

In both Canada and United States, approaches for measuring the economic contribution of cultural industries are multiplier analysis and economic size analysis (Appendix, A. 2). In Canada, the economic contribution of culture includes direct, indirect, and induced economic impacts[59] (Conference Board of Canada, 2008) (Appendix, A. 2). In 2009, an additional multiplier was calculated for measuring indirect spin-off of culture sector on employment (Board of Trade of Metropolitan Montreal, 2009).

In the USA, measuring of the economic contribution of cultural industries (Appendix, A. 2) presented as systematic data on business statistics (number of organizations and employees) by U.S. state and U.S. Congressional District (Creative Industries: Business & Employment in the Arts 2008; 2010; 2011). Moreover, The base of calculating multipliers was I-O tables were constructed for 156 study regions (116 cities and counties, 35 multicounty regions and five states). Data were collected from 6080 non-profit arts and cultural organizations, while impacts were measured as total expenditure, full-time equivalent jobs, resident household income, local government revenue, state government revenue and federal income tax revenue (Americans for the Arts, 2009).

In the Asia-pacific region, measurement tools of economic contribution for cultural industries are evident in Australia (Appendix, A. 2), based on numerous mapping studies and conducted researches. Moreover, the production chain model is used and also focused on creative activities in Australia. The mapping studies, which used for analyzing cultural industries, were consisting of five stages: pre-creation[60], creation[61], realization[62], consumption[63], and post-sale[64]. Only the pre-creation and creation stages are including for measuring the economic contribution[65]. The applied approach for measuring the economic contribution of cultural industries in this region is economic size and structural analysis in both Australia and China(Appendix, A. 2). In contrast, structural analysis is used for studying the structure of the culture studies in India and also for analyzing the distribution of macro-economic aggregates by sub- sectors (UNESCO, 2012).

In the South America region, MERCOSUR countries constructed I-O matrix with 29 products and 29 branches of activities, based on the CSA system and culturality of goods and services, using both monetary and non-monetary indicators. Moreover, cultural activities in these countries are included in mapping and other methodological approaches for the creation of cultural satellite accounts. The objective was to develop a CSA system to achieve supporting decision-making process and evaluation of cultural policies set comparable information system and economic measures at international and cross-country levels, and provide information for structural analysis (p. 25).

In Africa, researches that dealt with measuring the economic contribution of cultural industries are scarce(Snowball *et al*., 2017; Oyekunle, 2017; Oyekunle and Fillis 2016; Hadisi and Snowball 2017; Nawa and Sirayi 2014, Ghoneim, 2005; 2002), and most of their interests were focusing on the case of South Africa (Shafi *et al*., 2020; Oyekunle and Sirayi 2018; O'Brien *et al.*, 2016; National Planning Commission 2013; Joffe and

[59] Direct impacts include the value-added to the economy by firms directly producing cultural goods and services. Indirect impacts include the added value that the "direct impact firms" generate economically through their demand for intermediate inputs or other support services. In contrast, induced impacts are derived when employees of industries (both direct and indirect) spend their earnings and industry owners spend their profits (Conference Board of Canada, 2008).

[60] Including libraries and museums, which are essential resources for creative people.

[61] Including primary creative activities.

[62] Including replication and distribution of the creative product.

[63] For example, television and stereo equipment.

[64] Including repair, maintenance, support, second-hand sales.

[65] In Australia, the creative trident model has also been used for analyzing the economic contribution of cultural industries, known as the employment-based classification model. This model is used for measuring the scope of the creative economy in Australia (Higgs and Cunningham, 2007).

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Newton 2007). So, it is difficult to provide an evident for the measuring methodologies in the selected African countries.

In South Africa, direct and indirect economic contribution has been measured for the first time in 2008. The total direct contribution was measured using value-added, output, and employment indicators[66]. While the indirect contribution was calculated by estimating both output and value-added multipliers (British Council, 2008). Later, other researchers measured the economic contribution of cultural industries in South Africa using four indicators, as follows: the value of production, profitability, employment, and number of firms in cultural industries. Some of these studies also analyzed the structure of culture industries in South Africa using the value chain model (UNESCO, 2012).

In the same context, as our best knowledge, conducted researches for measuring the economic contribution of cultural industries in Egypt were scarce. Ghoneim used the questionnaire method and available poor data to measure the importance of cultural industries for Egypt. He estimated the economic contribution of cultural industries by 0.000128% to GNP in 1999 (Gross National Product). Yet, he revealed optimistic estimates that would not exceed 0.5% of GNP[67]. Such estimates were very low, compared with other countries[68] (Ghoneim, 2002).

VI. Concluding Remarks

The relationship between culture and economics is debatable and has increasing interests across countries. The research in measuring the economic contribution of cultural industries revealed the importance of cultural industries for stimulating economic growth. Therefore, there is increasing interest to measure the economic contribution of cultural industries, using several approaches and methods.

In light of this study, we may reach several conclusions and suggestions as follow:

First, the importance of cultural industries has been more realized by developed countries. Therefore, the conducted researches of cultural economics are more evident and complicated in developed countries rather than developing countries.

Second, cultural industries in developing countries are sometimes considered as a part of the creative industry. At the same time, there is a clear distinction between cultural and creative industries in developed countries, particularly in the EU.

Third, although the realization of cultural industries importance, there are not a clear and common definition for cultural industries in developed and developing countries, this led to difficulties in setting comparable measures for economic contribution of cultural industries at the international level, while comparable measures are much available at local and regional levels.

Fourth, there are several approaches for measuring the economic contribution of cultural industries. Yet, these approaches face serious problems in application, particularly the identification of these industries and activities that should be included in cultural industries, and also there is a lack of a common conceptual framework across countries.

Fifth, data limitation is still the main problem for measuring the economic contribution of cultural industries, due to statistics of cultural industries and statistical methodologies which have not been harmonized in a systematic manner.

Sixth, although difficulties, the measuring approaches of the economic contribution of cultural industries can be effective for analyzing the structure of cultural industries, and their contribution to economic growth. Yet, they are still not enough measures for cultural industries' contribution. So, we can suggest the need for more evolution to new common concepts and measurements of economic contribution for these industries to be more comparable at both regional and international levels.

Seventh, while several approaches of measuring are applied, mapping studies represent a starting point for measuring the economic contribution of cultural economic. So, we can suggest it for measuring the economic contribution of cultural industries for the Egyptian case, which is suffering from scarce researches in this field. *Eighth,* the Egyptian case needs a clear conceptual framework for cultural industries and also data availability about these industries. So, constructing cultural satellite accounts (CSA) for Egypt is necessary. That would be a great first step towards measuring the economic contribution of cultural industries in Egypt.

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[66] The total direct contribution was measured for 11320 firms related to cultural industries in South Africa (British Council, 2008).
[67] These estimates were based on four core cultural industries: book publishing industries, music sound recording, film production industry, software industry (Ghoneim, 2002).
[68] The economic contribution for the four core industries of culture to GNP by the year 2000 in other countries were as follows: 3.1% in Australia; 2.9 in Germany; 5.06 % in India; 3.6% in UK; and 3.3% in USA (Alikhan, 2001).

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Appendix A.1 : Cultural Industries in the Selected Countries: Concepts and Activities

Countries	Concept	Activities																						
		Architecture	Film & Video	Archives	Libraries	Museums	Heritage sites & places	Broadcasting (radio & TV)	Performing Arts (theatre, dance, festivals)	Designs (product, fashion, festivals), Visual arts and art market	Publishing (book, press, journals)	Music industry	Software, computer games and multimedia, Internet access providers	Advertising	Education & training	Recreation, entertainment and other cultural activities	Botanical gardens and zoos	Wine & food industry	Audio industry	Sport industries	interdisciplinary activities	Tourism	Toys/amusement	Public administration	Jewellery, crafts, and related activities
Europe																								
Finland	Cultural sector	I	I	I	I	I	I	I	I	I	I	I	N	I	I	I	I	N	I	I	N	N	N	N	N
France	Cultural industry	N	I	N	N	N	N	I	N	N	I	I	N	N	N	N	N	N	N	N	N	N	N	N	N
Germany	Culture & creative industries	I	I	N	N	I	N	I	I	I	I	I	N	I	N	N	N	N	N	N	N	N	N	N	N
Italy	Cultural sector	I	I	I	I	I	I	I	I	I	I	I	I	I	N	N	N	I	N	N	N	N	N	N	N
Spain	Cultural sector	I	I	I	I	I	I	I	I	N	I	I	I	I	I	N	I	N	I	I	I	N	I	I	N
UK	Creative industries	I	I	N	N	N	N	I	I	I	I	I	I	I	N	N	N	N	N	N	N	N	N	N	N
North America																								
Canada	Cultural sector	I	I	I	I	I	I	I	I	I	I	I	I	I	N	N	N	N	I	N	N	N	N	N	N
USA	Creative industries	I	I	I	I	I	I	I	I	I	I	I	N	I	N	N	N	N	I	N	N	N	N	N	N
Asia-Pacific																								
Australia	Creative industries	I	N	N	N	N	N	I	I	I	I	I	I	I	N	N	N	N	N	N	N	N	N	N	N
China	Creative industries	I	N	N	N	N	N	I	I	I	I	I	I	I	N	N	N	N	N	N	N	N	N	N	I
India	Media& entertainment industries	N	I	N	N	N	N	I	N	N	N	I	N	I	N	N	N	N	N	N	N	N	N	N	N
South America																								
MERCOSUR	Cultural field	I	I	N	I	I	I	I	I	I	I	I	I	N	I	N	I	I	I	N	N	N	I	N	I
Africa																								
Egypt	Cultural industries	N	I	N	N	N	N	I	N	N	I	I	I	N	N	N	N	N	N	N	N	N	N	N	N
S. Africa	Culture & creative industries	N	I	N	N	N	I	I	I	I	I		I	N	N	N	N	N	N	N	N	I	N	N	I

Source: By the researcher, based on:

- UNESCO, 2012.
- Ghoneim, 2002; 2004.
- Joffe, A. And M. Newton, 2014.
- Shafi *et al.*, 2020.

I: Included in the concept ; **N**: not included in the concept

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Appendix A.2 : Cultural Industries in the Selected Countries: Measuring Approaches

	Measuring approach	Basic economic measures
Europe		
Finland	Economic size and structural analysis; cultural satellite accounts (CSA).	Export/import value; value added; public investment; public consumption; private consumption.
France	Economic size and structural analysis; value chain analysis by sub-sector.	Turnover; employment and distribution of employment; distribution of occupations; number of enterprises; distribution by size and value chain.
Germany	Economic size and structural analysis.	Turnover; share of self-employment in overall labour force; number of enterprises; structure of culture and creative industries by market segment; employment sub-sector analysis.
Italy	Economic size and structural analysis.	Value added; employment; structure of employment.
Spain	Economic size and structural analysis; Cultural Satellite Accounts (CSA).	Gross value added as share of GDP; structural analysis by sub-sector; GVA and GDP formation.
UK	Economic size and structural analysis; Input Output matrix.	Gross value added (GVA); employment; structure of employment; value added; productivity; number of enterprises; creative industries sub-market analysis; distribution of creative employment in creative and non-creative sector.
North America		
Canada	- Economic size and structural analysis. - Input-output table and multipliers approach; economic size and structural analysis	1- Value added by sub-sector of copyright-based industries, employment by sub-sector of copyright-industries, foreign trade (foreign revenue and export) by sub-sector of copyright-based industries. 2- Employment (number of employees in cultural sector; employment growth rate), GVA (value and growth rate); nominal GDP, salaries and remuneration (culture sector and suppliers of culture sector), net revenues of individual companies, gross earnings before taxes, government revenues generated by taxation of culture sector (firms taxes, income taxes and indirect taxes), private funding for cultural sector , foreign trade of cultural goods, government spending in the culture sector by level of government, employment multiplication factor .
USA	- Economic size and structural analysis. - Multiplier analysis based on regional I-O tables.	1- Value added by sub-sector of copyright-based industries, employment by sub-sector of copyright-based industries, foreign trade by sub-sector of copyright-based industries, compensation per employee, contribution of the copyright-based industries to the real annual growth of the total economy. 2- Economic impact analysis: total expenditure, full-time equivalent jobs, resident household income, local government revenue, state government revenue, federal income tax revenue. Growth of non-profit industries measured by number of organizations and attendees. Structure of workforce in not-for profit arts and cultural industries sector

Asia-Pacific		
Australia	Economic size and structural analysis	Value of gross product, share in total GDP, real GDP annual growth rate of creative industries, employment, sub-sector share employment, growth rate, income distribution and wages by employment, labour productivity by sub-sectors, average productivity growth, foreign trade, distribution of creative occupations, creative trident statistics, number of businesses, entry and exit rates, scale of business, turnover, concentration of creative businesses and manpower.
China	Economic size and structural analysis; satellite account creative sector sub- model	Value Added (VA) by sub-sectors, employment by sub-sectors, foreign trade ,VA multiplier, and employment multiplier
India	Economic size and structural analysis.	Value Added (VA) by sub-sectors , sub-sector share employment, growth rate, income distribution and wages by employment, labour productivity by sub-sectors, average productivity growth, foreign trade, distribution of creative occupations, creative trident statistics, number of businesses.
South America		
MERCOSUR	I-O Matrix, CSA, Mapping studies	Aggregate variables, Value Added (VA), share of GDP
Africa		
Egypt	Questionnaire Method	Share of GNP
S. Africa	CSA, Mapping studies	Value Added (VA), share of GDP, Employment indicators, Profitability, Number of firms, Structure of Culture industries.

Source: By the researcher, based on :

- UNESCO, 2012.
- Ghoneim, 2002; 2004.
- Joffe & Newton, 2014.
- Shafi *et al.*, 2020.
- Oyekunle, 2017.
- Snowball *et al.*, 2017.

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Urban Imbalance and Non-Inclusive Development in Mexico: The Case of its Top 15 Major Urban Municipalities

By Octavio Luis-Pineda

National Polytechnical Institute of Mexico

Abstract- Under the basic premise that an economy and its territory as a socioeconomic entity, are inscribed into a nation's space. Accordingly, the concomitant sustainable handling of its natural resources and people´s well-being depends on myriad factors among which stands out firstly, the country's own socioeconomic dynamics and secondly, but not least important, the political capacity of the State´s intervention into the economy, as the foremost legal entity capable to advance the nation´s economic strategy, to simultaneously foment growth and social well-being into the nation. Upon this premise, the article aims at analyzing the socioeconomic implications and multiple externalities derived from the neoliberal economic strategy implemented by Mexico in the last decades, with particular reference to the country´s current urban imbalances around the country´s top 15 municipalities including Mexico City to demonstrate its failure and the compelling need to reorient it towards a more balanced, social-inclusive and sustainable urban development. Time´s horizon for this analysis ranges from 1980-2018.

Keywords: *urban imbalance, unsustainable, socially noninclusive urban development.*

GJHSS-E Classification: *FOR Code: 149999*



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Urban Imbalance and Non-Inclusive Development in Mexico: The Case of its Top 15 Major Urban Municipalities

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Abstract- Under the basic premise that an economy and its territory as a socioeconomic entity, are inscribed into a nation's space. Accordingly, the concomitant sustainable handling of its natural resources and people´s well-being depends on myriad factors among which stands out firstly, the country's own socioeconomic dynamics and secondly, but not least important, the political capacity of the State´s intervention into the economy, as the foremost legal entity capable to advance the nation´s economic strategy, to simultaneously foment growth and social well-being into the nation. Upon this premise, the article aims at analyzing the socioeconomic implications and multiple externalities derived from the neoliberal economic strategy implemented by Mexico in the last decades, with particular reference to the country´s current urban imbalances around the country´s top 15 municipalities including Mexico City to demonstrate its failure and the compelling need to reorient it towards a more balanced, social-inclusive and sustainable urban development. Time´s horizon for this analysis ranges from 1980-2018.

Keywords: urban imbalance, unsustainable, socially non-inclusive urban development.

Resumen- Bajo la premisa básica de que una economía y su territorio como entidad socioeconómica, se inscriben en el espacio de una nación. En consecuencia, el manejo sustentable concomitante de sus recursos naturales y el bienestar de las personas depende de una miríada de factores entre los que se destacan, en primer lugar, la propia dinámica socioeconómica del país y, en segundo lugar, pero no menos importante, la capacidad política de intervención del Estado en la economía, como la principal entidad legal capaz de hacer avanzar la estrategia económica de la nación, para fomentar simultáneamente el crecimiento y el bienestar social de la nación. Sobre esta premisa, el artículo tiene como objetivo analizar las implicaciones socioeconómicas y las múltiples externalidades derivadas de la estrategia económica neoliberal implementada por México en las últimas décadas, con especial referencia a los desequilibrios urbanos actuales del país en torno a los 15 principales municipios del país, incluido México. City para demostrar su fracaso y la imperiosa necesidad de reorientarla hacia un desarrollo urbano más equilibrado, socialmente inclusivo y sostenible. El horizonte temporal de este análisis va de 1980 a 2018.

Palabras clave: desequilibrio urbano, desarrollo urbano insostenible, socialmente no inclusivo.

I. Introducción

Este artículo busca ofrecer una visión general sobre la problemática económica, social y ambiental observada a lo largo de 15 urbes nacionales (municipios) durante el periodo 1980-2018. Presentamos aquí algunos resultados encontrados en esta investigación. Bajo esta premisa el trabajo comprende estudiar el ámbito económico, social y ambiental. Con la idea de mostrar el nivel de desequilibrio prevaleciente entre los distintos municipios (urbes) más importantes del país cara a la estrategia económica aplicada por el Estado mexicano durante esos años que ha desembocado en múltiples problemas que afectan al bienestar de estos municipios y sus habitantes, pero también las regiones económicas en donde se inscriben. Como lo hemos constatado en investigaciones de mayor envergadura que involucra precisamente el desarrollo regional y urbano en México, vid Luis-Pineda, O. (2019).

a) *Panorámica Económica:* Los parámetros para este rubro son: *PIB, el PIB per cápita, empleo formal e informal* para distintos años donde hemos podido recabar información disponible. Complementada con estimaciones propias en los años en donde no hemos podido allegarnos de información histórica confiable.

i. *PIB y PIB p.c.: Panorámica Económica.* Para examinar el comportamiento del PIB y su correspondiente per cápita de las 15 principales urbes o municipios referidos, los hemos clasificado en orden del tamaño de su producto, expresado en dólares americanos corrientes para hacer posible su contrastación a lo largo del tiempo, debido a las variaciones del peso frente al dólar. Con este fin presentamos en la Tabla 1.1 el panorama económico de dichos municipios para el lapso 1980-2018 como se muestra enseguida:

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Tabla 1.1: PIB (MD$USDls) y PIB p.c. ($USDLLS)Panorama Económico Urbano(1980-2018)

Nombre de Municipio	1980	1990	2000	2010	2018	TMAC (1980-2018)	1980	1990	2000	2010	2018	TMAC (1980-2018)
CDMX	$ 45,647	$ 68,196	$ 101,878	$175,034	$ 205,862	4.0%	$5,543	$7,926	$11,610	$19,775	$22,985	3.8%
Tijuana	$ 11,944	$ 15,465	$ 20,029	$15,291	$ 16,283	0.8%	$15,901	$12,771	$12,836	$9,798	$9,612	-1.3%
Monterrey	$ 15,462	$ 16,829	$ 18,317	$18,075	$ 17,117	0.3%	$14,460	$15,148	$16,131	$15,918	$15,499	0.2%
CD.Juárez	$ 9,870	$ 12,500	$ 15,831	$11,736	$ 13,105	0.7%	$12,361	$10,256	$11,884	$8,819	$9,213	-0.8%
Guadalajara	$ 6,640	$ 10,888	$ 17,854	$13,117	$ 12,020	1.6%	$4,919	$8,613	$11,941	$8,775	$8,284	1.4%
Zapopan	$ 7,022	$ 10,435	$ 15,508	$10,911	$ 11,296	1.3%	$9,862	$10,425	$12,468	$8,775	$8,289	-0.5%
León	$ 7,853	$ 10,489	$ 14,010	$9,454	$ 11,114	0.9%	$9,048	$9,243	$9,753	$6,581	$6,874	-0.7%
Hermosillo	$ 9,839	$ 10,192	$ 10,557	$8,923	$ 11,246	0.4%	$21,915	$16,713	$13,460	$11,376	$12,378	-1.5%
Guadalupe	$ 8,512	$ 9,115	$ 9,769	$10,792	$ 11,032	0.7%	$15,894	$13,601	$14,395	$15,918	$15,999	0.0%
Querétaro	$ 9,073	$ 10,074	$ 11,187	$8,823	$ 10,288	0.3%	$19,877	$15,707	$13,949	$11,002	$11,492	-1.5%
Mexicali	$ 10,423	$ 10,537	$ 10,662	$9,179	$ 10,560	0.0%	$17,315	$13,766	$11,370	$9,798	$10,473	-1.3%
Saltillo	$ 2,386	$ 3,636	$ 5,549	$8,990	$ 11,565	4.2%	$5,412	$6,290	$7,640	$12,398	$13,979	2.5%
Ecatepec de Morelos	$ 4,009	$ 7,352	$ 13,482	$9,303	$ 8,300	1.9%	$3,291	$4,531	$8,141	$5,617	$4,884	1.0%
Apodaca	$ 1,178	$ 2,157	$ 3,959	$8,331	$ 11,217	6.1%	$10,166	$7,616	$7,547	$15,918	$17,591	1.5%
Puebla	$ 2,539	$ 5,980	$ 14,002	$8,711	$ 7,097	2.7%	$2,401	$4,440	$9,145	$5,657	$4,431	1.6%

Fuente: Elaboraciones propias con datos del INEGI

ii. *Comentario (PIB y p.c.):* Destaca que las urbes con mayores niveles de PIB para 2018, son primeramente, la CDMX (205.6 $USmmd), seguida muy por abajo por Monterrey (17.2 $USmmd) y en tercero Tijuana, B.C. (16.3 $USmmd). El resto resultan rezagados respecto de estas tres principales urbes. Referente al dinamismo de crecimiento del PIB, resalta Apodaca, N.L. con una tasa del 6.1% promedio anual, seguido por la CDMX con un 4.0%, en tercero por Saltillo que crece al 4.2% y cuarto Puebla (2.7%) promedio anual, respectivamente. El resto manifiestan tasas marginales o modestas de crecimiento durante este periodo.

En tanto que respecto del cápita notamos un panorama contrastante para 2018, pues mientras la CDMX (22.3 mil$USdls), seguida en segundo lugar por Apodaca (17.6 m$USdls), en tercero Guadalupe (16.0 m$USdls), cuarto Monterrey (15.4m$USdls) y por último en quinto Saltillo (13.9 m$USdls). El resto reportan valores modestos en su per cápita, manejando cifras del orden de 10-11 m$USdls. Nótese que Ecatepec, uno de mayor densidad poblacional del país, reporta para este año el más bajo per cápita (4.8m$USdls.) En cuanto a la dinámica de crecimiento del per cápita excepción destaca el primer lugar la CDMX (3.8%) y Saltillo (2.5%). El resto manifiestan valores negativos o muy modestos en su crecimiento de su per cápita, como el caso de Apodaca y Ecatepec, quienes crecen al (1.5%) y (1.1%) promedio anual, respectivamente. Todo lo cual implica que, aunque existe crecimiento de la mayoría de municipios éste no conlleva un incremento en el nivel de vida de sus pobladores, sino por el contrario a una sistemática pérdida del nivel de vida de la población de la mayoría de estas urbes como se manifiesta por la disminución del per cápita durante estos años.

iii. *Empleo Formal e Informal: Panorámica Urbana.* En este renglón, y a diferencia del caso del análisis regional, donde las estadísticas oficiales resultan profusas y más fáciles de trabajar, para el análisis intra-urbano o municipal se convierte en una tarea bastante complicada por lo escasez de datos donde frecuentemente hay inferirla indirectamente a través del comportamiento de las estadísticas oficiales de la entidad en cuestion donde se ubica dicho municipio. Bajo esta tesitura hemos estimado el period 1980-2018 con la idea de ofrecer una panoramic aproximada sobre el comportamiento del empleo formal e informal entre las urbes nacionales estudiadas. El empleo formal e informal de la Tabla 1.2 sobre el Empleo Formal e Informal de los municipios estudiados, expresado en millones de personas. Como se muestra a continuación:

Tabla 1.2: Empleo Formal y Empleo Informal (1980-2018)(Millones personas)

Nombre de Municipio	1980	1990	2000	2010	2018	TMCA(1980-2010)	1980	1990	2000	2010	2018	TMCA(1980-2010)
CDMX	2.551	2.885	3.563	3.641	4.259	1.3%	0.682	0.938	1.407	1.728	2.206	3.1%
Tijuana	0.162	0.262	0.446	0.660	0.953	4.7%	0.006	0.004	0.104	0.349	2.085	26.6%
Monterrey	0.318	0.362	0.447	0.466	0.517	1.3%	- 0.251	-0.270	-0.329	-0.315	- 0.332	0.7%
CD.Juárez	0.213	0.263	0.480	0.496	0.619	2.8%	0.002	0.010	0.078	0.177	0.556	18.6%
Guadalajara	0.501	0.548	0.667	0.660	0.709	0.9%	- 0.116	-0.141	-0.162	-0.207	- 0.241	1.6%
Zapopan	0.141	0.223	0.464	0.542	0.771	4.5%	0.001	0.004	0.004	0.069	0.308	10.6%
León	0.165	0.275	0.432	0.593	0.865	3.9%	0.036	0.079	0.176	0.333	0.592	7.5%
Hermosillo	0.097	0.147	0.295	0.327	0.451	4.1%	0.025	0.052	0.110	0.208	0.357	7.1%
Guadalupe	0.139	0.177	0.266	0.282	0.341	2.4%	0.002	0.005	0.003	0.022	0.040	7.7%
Querétaro	0.087	0.140	0.248	0.345	0.494	4.6%	0.001	0.005	0.004	0.126	0.510	18.6%
Mexicali	0.143	0.200	0.265	0.386	0.500	3.3%	0.037	0.070	0.113	0.231	0.372	6.2%
Saltillo	0.095	0.137	0.218	0.277	0.368	3.0%	0.005	0.017	0.050	0.140	0.325	11.1%
Ecatepec de Morelos	0.271	0.368	0.581	0.662	0.839	3.0%	0.186	0.273	0.463	0.673	0.771	3.8%
Apodaca	0.014	0.037	0.167	0.218	0.431	9.2%	0.004	0.010	0.030	0.061	0.126	9.5%
Puebla	0.253	0.326	0.507	0.624	0.809	3.3%	0.051	0.100	0.220	0.350	0.578	6.5%

Fuente: Elaboraciones propias con datos del INEGI.Varios años

i. *Comentario (empleo formal e informal):* Destaca que para finales del periodo la mayor generadora de empleos formales resulta la CDMX (4.2 millones de personas), seguida muy por debajo, por Tijuana, Guadalajara, León y Puebla, quienes todavía no logran el 1.0 millón de empleos formales para 2018. Respecto al dinamismo en la generación de empleos, Apodaca ocupa la delantera con un espectacular crecimiento del 9.2% promedio anual, seguido en segundo lugar, Tijuana (4.7%,), tercero Querétaro (4.6%), cuarto, Zapopan (4.5%) y quinto lugar, Hermosillo (4.12%) respectivamente. El resto de municipios observan modestos niveles de dinamismo. Nótese que la CDMX y Monterrey, otrora fuentes de gran dinamismo en generación de empleos formales en el país ahora observan tasas pequeñas pues la CDMX (1.4%) y Monterrey (1.3%) promedio anual en el periodo. Lo que nos habla para el caso de estas dos urbes, de su gradual saturación industrial y concomitante éxodo

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industrial hacia su periferia, como el caso de Querétaro frente a la CDMX y Apodaca, Guadalupe y Apodaca frente a Monterrey.

Respecto al volumen de empleo informal para 2018, destaca primeramente la CDMX (1.7 millones) y en segundo, Ecatepec (0.7 millón de personas). El resto observan niveles por debajo de Ecatepec. Empero, lo preocupante son las tasas de crecimiento del subempleo o empleo informal pues resultan muy altas, destacando primeramente Tijuana (25.0%), seguida en segundo por Querétaro (18.0%), tercero Zapopan (16.8%), cuarto Juárez (15.5%) y sexto Saltillo (11.1%) respectivamente. El resto reportan tasas pequeñas o relativamente modestas de crecimiento. Todo lo cual significa que, aunque muchos de las urbes son altas generadoras de empleos en México, también son expulsoras de mano de obra hacia la informalidad dentro de la propia urbe y consecuentemente agravan el problema de saturación alrededor de la misma y representan un caldo de cultivo para diversas externalidades hacia su interior.

ii. *Comentario Panorámica Económica:* Percibimos un esquema urbano de crecimiento polarizado al interior de estos municipios pues mientras el PIB de estos municipios crece de manera sostenida durante el periodo, su per cápita no crece al ritmo y en algunos casos se contrae respecto de 1980, lo cual no habla de un crecimiento desequilibrado al interior de estas urbes en durante el periodo. Destaca que el empleo formal crece de manera sostenida en estos municipios, en algunos casos de manera impresionante como Apodaca (9%), Tijuana (4.7%), Querétaro, Tijuana y Zapopan (por arriba del 4.5%). Aunque por el otro lado, el empleo informal crece también de manera impresionante como el caso de Tijuana (25%), Guadalupe (18%), y Querétaro (18%), Zapopan (16%) y Cd.Juárez (15%).

Bajo este marco, no es posible soslayar el hecho de que la informalidad a nivel urbano es un claro reflejo de un problema estructural de México desde tiempo atrás, como destacan cifras oficiales, pues para 2012, alcanzaban 14 millones de empleos, según cifras oficiales, vid INEGI (2012). Aunque de fuentas alternas reportaban que la cifra real alcanzaba los 25 millones de personas para estos mismos años vid, Reyes, Gil (2011). Lo que permite explicar la existencia de los "nini´s", nombrados así por los medios masivos de comunicación del orden 7 millones de personas según estimaciones de parte de organismos internacionales, vid, OCDE(2011).

b) Panorámica Social Urbana: En aras de espacio en esta exposición en el rubro social solamente consideramos los indicadores: *Población total (millones de personas), coeficiente de Gini o distribución de la riqueza,* para examinar las urbes aquí estudiadas. Enseguida reproducimos la información recopilada de fuentes oficiales y complementada con estimaciones propias respecto de la población total de estos municipios como se reporta en la Tabla 2.1 Población de Municipios analizados para 1980-2018 como aparece líneas abajo:

i. *Población Total: Panorámica Social Urbana.* En el marco de este trabajo consideramos importante conocer el comportamiento de la población de estos municipios por lo que examinaremos la evolución de su *población total* (millones personas) para el periodo 1980-2018 como se reporta en la Tabla 2.1:

Tabla 2.1: Población Total Municipios (1980-2018).(Millones personas)

Estado	Nombre de Municipio	1980	1990	2000	2010	2018	TMCA (1980-2018)
CDMX	CDMX	8.236	8.236	8.605	8.851	8.919	0.2%
Baja Californ	Tijuana	0.540	0.747	1.211	1.560	1.804	3.2%
Nuevo León	Monterrey	1.054	1.069	1.111	1.136	1.114	0.1%
Chihuahua	Juárez	0.636	0.798	1.219	1.332	1.487	2.3%
Jalisco	Guadalajara	1.586	1.650	1.646	1.495	1.501	-0.1%
Jalisco	Zapopan	0.551	0.712	1.001	1.244	1.436	2.6%
Guanajuato	León	0.679	0.868	1.135	1.436	1.696	2.4%
Sonora	Hermosillo	0.340	0.449	0.610	0.784	0.959	2.8%
Nuevo León	Guadalupe	0.485	0.536	0.670	0.678	0.703	1.0%
Querétaro	Querétaro	0.349	0.456	0.641	0.802	0.951	2.7%
Baja Californ	Mexicali	0.492	0.602	0.765	0.937	1.049	2.0%
Coahuila	Saltillo	0.344	0.441	0.578	0.725	0.868	2.5%
México	Ecatepec de	1.070	1.218	1.623	1.656	1.743	1.3%
Nuevo León	Apodaca	0.057	0.116	0.283	0.523	0.727	6.9%
Puebla	Puebla	0.899	1.057	1.347	1.540	1.654	1.6%

Fuente: Elaboración propia con datos de INEGI

ii. *Comentario:(Pob.total):* Observamos que indiscutiblemente la CDMX destaca para 2018 como la urbe con mayor volumen poblacional en el país (8.9 millones personas) seguida muy por abajo por Tijuana (1.8 millones personas) y en tercero Puebla (1.6 millones personas). Aunque existen varias urbes cuya población todavía no alcanzaba para 2018 el 1.0 millón de habitantes. No obstante, reportan altas tasas de crecimiento como Mexicali, Hermosillo, Querétaro, Ecatepec, Puebla y Apodaca. Nótese que la tasa de crecimiento de la capital mexicana (0.2%) contrasta fuertemente contra el desorbitado crecimiento de algunos municipios, como Apodaca (6.9%), Tijuana (3.2%) y otros que crecen por arriba del 2.0% promedio anual, como el caso de Juárez, Mexicali, Hermosillo, León, Querétaro. El resto observan tasas por abajo del 2% promedio anual.

Todo lo cual conlleva una presión para estas urbes no solamente en la demanda de los servicios

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públicos y vivienda para atender la creciente demanda de la población de dichos municipios, resultado estos grandes hacinamientos humanos y otras externalidades sociales como desempleo y pobreza, como sucede para para el caso de la CDMX, donde la pobreza alcanza actualmente (2020) al menos de la mitad de sus habitantesg, como refiere Bolaños S., Angel (2020). En obvio de espacio, omitimos discutir otras urbes importantes como Monterrey sus municipios conurbados como Apodaca, Guadalupe, así como otros de la región centro como Querétaro y Puebla municipios conurbados de la CDMX, aunque datos preliminares nos confirman un panorama similar.

iii. *Distribución de la Riqueza (Gini): Panorámica Social Urbana.* Resulta importante conocer el grado de distribución de la riqueza. Para lo cual, echaremos mano del coeficiente o índice de Gini (cuyo valor puede oscilar, entre 0.0 a 100.0, 0.0 a 1.0 para indicarnos ya sea extrema igualdad o extrema equidad en la distribución del ingreso entre la población de una economía, region o país. Indices Gini por Municipio que aparecen en la Tabla 2.2 para el period 1980-2018:

TABLA 2.2. INDICE DE GINI.MUNICIPIOS.PERIODO (1980-2018)

Municipio	1980	1990	2000	2010	2018e	TMAC(1980-2018)(%)
CDMX	0.587	0.586	0.505	0.517	0.508	-0.2
Tijuana	0.477	0.475	0.434	0.389	0.359	-1.1
Monterrey	0.498	0.496	0.465	0.414	0.425	-1.1
Juárez	0.485	0.482	0.432	0.362	0.357	-1.2
Guadalajara	0.537	0.535	0.499	0.410	0.407	-1.1
Zapopan*	0.531	0.529	0.550	0.443	0.439	-0.8
León	0.493	0.492	0.488	0.426	0.421	-0.9
Hermosillo	0.496	0.494	0.459	0.404	0.401	-1.0
Guadalupe	0.429	0.427	0.422	0.386	0.379	-0.6
Querétaro	0.561	0.559	0.481	0.449	0.441	-1.5
Mexicali	0.456	0.453	0.444	0.378	0.376	-0.9
Saltillo	0.511	0.505	0.450	0.416	0.402	-1.2
Ecatepec	0.421	0.418	0.410	0.396	0.385	-0.3
Apodaca	0.375	0.374	0.383	0.383	0.369	-0.5
Puebla	0.517	0.515	0.485	0.443	0.473	-1.0

Fuente: Elaboraciones propias con base a datos del INEGI. Varios años

iv. *Comentario (Gini):* A partir de los valores del índice de Gini reportados en la Tabla anterior, para los municipios analizados, destaca lamentablemente la desigualdad de ingresos que priva entre estas urbes. Que, aunque los valores a inicio del periodo resultan altos y con el paso del tiempo manifiestan una ligera mejoría, la desigualdad persiste durante el periodo para la gran mayoría de estos municipios. A juzgar por la tasa negativa que observa este índice en todos los casos, que podría interpretarse como una ligera mejoría en el nivel de desigualdad en prácticamente todos los municipios, dicha mejoría resulta marginal.

Aunque resulta oportuno considerar que este indicador es meramente un referente de la desigualdad existente al interior de estos municipios. La realidad es que no considera otros factores agravantes como el desplome de la economía ocurrida en época reciente por la recesión causada por la guerra arancelaria entre Estados Unidos y China y sus implicaciones para países que guardan estrecha relación con el vecino del norte, como México. Como tampoco puede incorporar el efecto recesivo de la pandemia actual sobre el empobrecimiento de la población en todos estos municipios. Sino que el problema de la desigualdad se encuentra enraizado en la estructura misma de la economía mexicana, específicamente en el modelo de desarrollo excluyente aplicado en el país por décadas que ha sido incapaz de satisfacer la demanda económica y social del país, propiciando por contra un sinnúmero de externalidades desde años atrás y demandando su reorientación por parte de algunos estudiosos del tema, vid Luis-Pineda, O. (2008) y Mayoral J., Isabel (2011).

v. *Comentario Panorámica Social:* En primer término, notamos la alta concentración poblacional existente en la CDMX (más de 9.0 millones) para 2018 representando la mayor concentración urbana frente al resto de municipios o urbes nacionales. Seguida muy por abajo en segundo lugar por Puebla (3.2 millones) y en tercero por Puebla (1.6 millones). El resto todavía no alcanzan el millón de habitantes. El problema de la población es la tasa de crecimiento de estas urbes, pues mientras la CDMX crece marginalmente (0.2%), otros lo hacen de manera alarmante como Apodaca (6.9%), Tijuana (3.2%) y otros como Querétaro, Juárez, Zapopan, León y Hermosillo lo hacen por arriba del 2% promedio anual en el periodo. Lo cual resulta muy alto para una región o país, pues conlleva duplicar, triplicar, etc., la población en poco tiempo, etc. Todo lo cual anticipa para el futuro próximo problemas para las autoridades municipales por el agravamiento de las implicaciones y externalidades propiciadas, como hacinamiento humano e industrial, violencia, etc.

Por último, respecto a la distribución de la riqueza mediante el índice de Gini, resalta que la CDMX representa la urbe más desigual del país, mientras que Apodaca, N.L., la de menor desigualdad económica en el país para finales del periodo. Situación que no excluye otros problemas sociales asociados al hacinamiento humano y otras externalidades que experimentan dichas urbes en material económica, como la informalidad, violencia, etc. Conviene destacar aquí el caso de la CDMX, la mayor concentración urbana del país, posee más de la mitad de ésta es pobre, como resalta *Bolaños S., Angel (2020).* Lo cual

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anticipan problemas en un futuro próximo no únicamente para ésta sino también aquellos con altas tasas de crecimiento poblacional como hemos mencionado anteriormente. El resto de municipios observan una desigualdad de ingresos preocupante que no dista mucho del panorama de desigualdad existente a nivel nacional (por arriba del 0.400).

c) *Panorámica Ambiental Urbana:* Bajo esta premisa, presentamos un resumen de los indicadores ambientales como *densidad poblacional* y *parque vehicular* como indicadores que poseen claramente implicaciones en el rubro ambiental, donde hemos encontrado información estadística confiable para los distintos años del analizado. Comenzaremos entonces con el análisis de la densidad de población de cada municipio (expresado en términos de habitantes por km2) para el periodo 1980- 2018.

i. *Densidad Poblacional:* Panorámica Urbana. Resulta importante conocer el grado de hacinamiento humano alrededor de los municipios estudiados durante el lapso de análisis por sus implicaciones no solamente ambientales, sino también sociales y económicas pues conlleva para las autoridades municipales, estatales y federales presión sobre los recursos naturales, servicios y satisfactores básicos como vivienda, empleo, etc. Por lo cual elaboramos la *Tabla 3.1* que reporta la densidad poblacional para el periodo 1990-2015, donde hemos podido allegarnos de información confiable, expresado en términos de número de habitantes por cada Km2 para dichos municipios en el lapso de studio Como se muestra enseguida:

TABLA 3.1 DENSIDAD POB. MUNICIPIOS. [HAB. /KM2].PERIODO(1990-2015)

Municipio	1990	2000	2010	2015	TMAC(1990-2015)(%)
CDMX	5,544	5,793	5,958	6,003	0.3
Tijuana	683	1,107	1,426	1,501	3.2
Monterrey	3,315	3,445	3,521	3,439	0.1
Juárez	224	342	374	391	2.2
Guadalajara	10,898	10,872	9,874	9,376	-0.6
Zapopan	612	860	1,069	1,145	2.5
León	711	930	1,177	1,294	2.4
Hermosillo	29	39	50	56	2.7
Guadalupe	4,548	5,691	5,757	5,799	1.0
Querétaro	615	865	1,081	1,185	2.7
Mexicali	47	59	73	77	2.0
Saltillo	78	102	128	143	2.5
Ecatepec de Morelos	7,604	10,130	10,339	10,473	1.3
Apodaca	471	1,152	2,126	2,426	6.8
Puebla	1,942	2,473	2,827	2,894	1.6

FUENTE: Elaboraciones propias con base a datos del INEGI.Varios años

ii. *Comentario (Densidad Pob.):* Resalta primeramente que para finales del periodo, por ejemplo, la asimetría en densidad poblacional de Ecatepec (10.4 mil hab.x km2), en segundo Guadalajara (9.4 mil), tercero la CDMX (6.0 mil), cuarto Guadalupe, N.L. (5.8 mil), quinto Monterrey, N.L. (3 mil) y sexto a Apodaca, N.L. (2.4), respectivamente. Sin embargo, lo preocupante de este escenario, de por sí dramático, es la tasa de crecimiento de este hacinamiento a través del tiempo.

En efecto, algunos municipios como el municipio de Apodaca, aunque con baja densidad poblacional para finales del periodo, viene creciendo a una tasa del 6.8% promedio anual en estos años. Cosa parecida sucede con Tijuana (1.5 mil hab.xkm2) quien crece por arriba del 3% aunque reporta baja densidad poblacional al final del periodo. Asimismo, las ciudades de León, Querétaro, Zapopan, Hermosillo y Saltillo que crecen a tasas por arriba del 2% el resto de municipios como antes mencionado vienen creciendo a tasas modestas o marginales. Todo lo cual desemboca claramente un crecimiento desordenado de la población y generación de problemas a nivel urbano, con implicaciones no sólo ambientales sino sociales y económicos, como hemos destacado previamente.

iii. *Parque Vehicular: Panorámica Urbana.* Empleamos este indicador para intentar medir indirectamente la contaminación ambiental por su estrecha vinculación con la generación de gases de efecto invernadero (CO2) en los municipios analizados, es a través del número de vehiculos en cada uno de los mismos durante el periodo de análisis como se reporta en la Tabla 3.2:

TABLA 3.2 PARQUE VEHICULAR. MUNICIPIOS [millones vehiculos](1980-2018)

Nombre Municipio	1980	1990	2000	2010	2018	TMAC(1980-18)(%)
CDMX	1.870	1.978	2.512	3.472	5.472	2.9
Tijuana	0.120	0.199	0.322	0.432	0.733	4.9
Monterrey	0.160	0.282	0.360	0.621	0.641	3.7
Juárez	0.129	0.237	0.374	0.468	0.522	3.8
Guadalajara	0.271	0.437	0.476	0.834	0.953	3.4
Zapopan*	0.030	0.155	0.228	0.555	0.745	8.8
León	0.048	0.087	0.172	0.362	0.572	6.8
Hermosillo	0.047	0.075	0.146	0.292	0.383	5.6
Guadalupe	0.024	0.037	0.148	0.331	0.312	6.9
Querétaro	0.033	0.069	0.155	0.270	0.297	5.9
Mexicali	0.119	0.205	0.278	0.284	0.489	3.8
Saltillo	0.029	0.075	0.094	0.226	0.313	6.4
Ecatepec de Morelos	0.032	0.105	0.148	0.477	1.042	9.6
Apodaca	0.003	0.008	0.037	0.121	0.200	12.2
Puebla	0.126	0.230	0.282	0.513	0.638	4.4

FUENTE: Elaboraciones propias con base en datos del INEGI.Varios años

iv. *Comentario (Parque Vehicular):* Observamos que para finales del periodo la CDMX aparece primeramente como la mayor concentradora de automóviles (5.4 millones de vehículos), seguida muy por abajo, en segundo lugar, por Ecatepec (1.0 millón automotores) y en tercero por varias

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urbes que todavía no alcanzan esta cifra para 2018 como Guadalajara, Monterrey y Puebla. Pero que, sin embargo, reportan altas tasas de crecimiento vehicular en el periodo. Por ejemplo, Apodaca (12.2%), Ecatepec (9.6%), Tijuana (4.9%), etc. Anticipan una mayor concentración vehicular y concomitantemente mayor contaminación atmosférica y muchas otras externalidades socioeconómicas asociadas como implicaciones a la salud de la población, presión sobre servicios públicos como infraestructura urbana, viales y carreteras, etc.

v. *Conclusiones: Panorámica Ambiental.*

A partir de los indicadores arriba mencionados, conviene enfatizar primeramente que el hacinamiento poblacional observado alrededor de las principales urbes nacionales, obedece claramente al crecimiento anárquico en estos municipios a lo largo de los últimos cuatro décadas. Muchos de los cuales, como el caso de Apodaca y Guadalupe con alta densidad de población, resultan claramente "válvulas de escape" derivado de la explosión demográfica e industrial de su respectiva metrópoli mayor, que funge como su urbe "polo" que resulta ser Monterrey. Fenómeno similar ocurre también con Zapopan respecto de Guadalajara y Ecatepec, respecto de la CDMX, etc.

Por otra parte, la alta concentración del parquet vehicular en estos municipios podemos asociarla a la contaminación atmosférica y generación de CO2 en los mismos a juzgar por las altas tasas de crecimiento poblacional y vehicular en éstos. Explicable por el mayor ingreso per cápita de la población de aquellos municipios bicados en las regions centro y norte del país, excepción hecha de Ecatepec, en el Estado de México.

Por último, la alta densidad poblacional en los principales municipios de mayor crecimiento económico. Cosa parecida sucede con el parque vehicular. Fenómeno explicable primeramente por el desorbitado crecimiento poblacional de estos municipios, beneficiados por la bonanza económica derivada asociada a la apertura comercial de México y su alta concentración industrial y crecimiento, respecto de otras regiones de la propia entidad y regiones del país con menores ingresos per cápita, como el sur, sureste y golfo de México, por ejemplo. Todo lo cual converge a la existencia de un esquema de desarrollo urbano desequilibrado, socialmente excluyente e insustentable en el México.

II. Conclusiones Generales

De los parámetros antes expuestos y analizados en los distintos rubros (económica, social y ambiental y diversos aspectos) considerados, se desprende claramente que atrás del desequilibrio urbano experimentado por estos municipios subyacen factores estructurales de nuestra economía como la incapacidad del Estado mexicano de promover a través del tiempo un adecuado del binomio crecimiento-bienestar social entre regiones y municipios o urbes nacionales. Frente a un estado omiso y corrupto que ha soslayado sistemáticamente las implicaciones sociales de la estrategia económica instrumentada en el país durante el lapso de estudio.

Luego entonces en el trasfondo actual del desequilibrio urbano que enfrentan estos municipios subyace la estrategia neoliberal antes referida enfocada a promover el crecimiento económico nacional a ultranza, soslayando el bienestar social de la población nacional y de estos municipios conllevando un enorme costo social y ambiental. Como se manifiesta por la penetración de capitales a hacia la periferia como una vertiente del proceso globalizatorio instrumentado por parte de las hegemonías mundiales, en donde México no podía escapar por su estrecha relación con los Estados Unidos, vid Luis Pineda, O. (1988).

Explicable por la estrecha vinculación de México con los E.E.U.U. y ser presa fácil de las políticas hegemónicas como el Consenso de Washington y sus nefastas consecuencias no solamente para México sino toda la región latinoamericana, vid Casilda, R. (2004), pero también por la permanencia en el poder de un sistema político y Estado sujeto a los intereses ajenos a los intereses sociales e invadido por la corrupción vid Blum, Roberto E. (1997) y Cardoso, Víctor (2012). Urgiendo al país a reconvertir la estrategia neoliberal por otra orientada a propiciar un crecimiento balanceado del binomio crecimiento y bienestar social como proponían desde hace más de una década diversas voces como Castellanos, A. (2004), Luis-Pineda, O. (2008) y Mayoral J., Isabel (2011).

Un factor central que ha agudizado sin dudas las fallas estructurales de nuestra economía y que afectan evidentemente el desarrollo regional y urbano nacional ha sido el ímpetu económico derivado por la aperture comercial, lo que entre cosas ha propiciado la transnacionalización de la economía nacional durante este periodo, como señala Hernández, Mario (2013), y privilegiando así al enriquecimiento de ciertos sectores asociados a la clase política, como el financiero, particularmente los bancos extranjeros quienes obtenido las mayores ganancias que en el resto del mundo como apunta González-Amador, Roberto (2005), explicable por la permanencia en el poder de un Estado corrupto como anteriormente señalábamos.

Bajo este marco se explica el interés de la actual administración de alejarse de la tesis neoliberal por otra, orientada a propiciar un desarrollo balanceado (crecimiento-bienestar) y sustentable, como se plasma en el Plan Nacional de Desarrollo(2019-2024) vid, AMLO. PND (2019), intentando propiciar un desarrollo incluyente y balanceado en regiones y municipios, como el Sur, Sureste y golfo de México,

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ancestralmente rezagadas por el ímpetu neoliberal, mediante megaproyectos como el *Tren Maya* y *Corredor Transísmico de Tehuantepec,* como también la *Refinería de Dos Bocas* en Tabasco y otros proyectos concurrentes de inversión pública hacia dichas regions para este sexenio, mediante una estrategia de desarrollo inédita y alejada del enfoque neoliberal del FMI.

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Economic De-Growth: A Theoretical and Critical Review

By Douglas Dias Braz & Leonne Augusto Coelho Magnani

Abstract- The aim of this article is to present a bibliographical review on the theme of de-growth, firstly discussing the emergence, the main foundations and the proposals of this theoretical conception. Subsequently, the most relevant critical arguments to this approach are exposed, both in relation to its internal consistency and the possibility of a de-growth program being compatible with a capitalist economy. The result of this review points to the need to advance in the construction of a more robust theoretical formulation on de-growth, considering the main criticisms presented in recent years.

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Economic De-Growth: A Theoretical and Critical Review

Douglas Dias Braz [α] & Leonne Augusto Coelho Magnani [σ]

Abstract- **The aim of this article is to present a bibliographical review on the theme of de-growth, firstly discussing the emergence, the main foundations and the proposals of this theoretical conception. Subsequently, the most relevant critical arguments to this approach are exposed, both in relation to its internal consistency and the possibility of a de-growth program being compatible with a capitalist economy. The result of this review points to the need to advance in the construction of a more robust theoretical formulation on de-growth, considering the main criticisms presented in recent years.**

Introduction

The Industrial Revolution initiated in the 18th century marks the dawn of capitalism as the dominant mode of production. Since then, the world has seen an accelerated growth in productivity, innovation and production. The 20th century was marked by the dispute between two distinct economic systems, capitalism and socialism. The engine of both was the same: increased productivity (productivism) and constant economic growth. The dispute ended in 1991, with the dissolution of the Soviet Union. Capitalism won the dispute for hegemony and now, more than ever, consumerism promoted by advertising, credit and programmed obsolescence is the great engine of economic growth.

But could economic growth be infinite? In a finite world, growth could not take place indefinitely. This was the conclusion of Georgescu-Roegen in his book *The Entropy Law and the Economic Process,* published in 1971[1]. In it, the Romanian economist shows that the planet is a closed system and that the economy is a subsystem of the ecosystem. Throughout production processes, we transform low-entropy energy into high-entropy energy. This implies that part of the energy and matter resulting from production can no longer be used. Thus, the production process is irreversible and growth cannot be infinite.

The theme, however, only gained visibility in 1972, after the release of a report, commissioned by the Club of Rome, entitled *The Limits to Growth*[2]. The report, through computational models, presented catastrophic predictions about the environment, if the production and consumption levels of that period were maintained.

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[1] Georgescu is considered the founder of ecological economics and inspiration for the de-growth movement.

[2] MEADOWS, D. H. et al. The limitstogrowth. New York: Universe Books, 1972.

Among the various debates that followed, the idea of sustainable development, which defended the possibility of reconciling economic development with environmental preservation, gained prominence, especially from 1987 onwards, with the publication of the Brundtland Report by the World Commission on Environment and Development. The conflict between economic growth and environmental preservation seemed to be resolved with the proposals for sustainable development.

The concept of sustainable development has become increasingly dispersed and trivialized, used by governments, international agencies and even by the most predatory companies (LENA, 2012). It is from the diffusion of this concept that his biggest criticism arises: is development (understood by economic growth) really sustainable? Its critics will say that growth and sustainability are paradoxical, that is, it is not possible to continue growing without worsening the environmental situation.

It is in the midst of this discussion that the movement in favor of de-growth was born. According to Rist (2012), the idea arose in 2002 at a colloquium in Paris, whose theme was "undoing development, remaking the world". Since then, the movement in favor of de-growth has gained more visibility and has had a great rise, although it remains a minority.[3]

De-growth theorists draw attention to the socio-environmental problems caused by the current "growth society". The transfiguration of this society into a "de-growth society", with values different from the current one, would be the solution to reduce social inequalities and avoid an environmental collapse.

From this discussion on de-growth, this article sought to present the historical perspective of the concept (Introduction); expose what de-growth is, as well as its main arguments, explaining the internal structure of this formulation and its most relevant proposals (section 1); and highlight the fundamental criticisms about the internal consistency and compatibility of proposals for the realization of a "degrowth society" in relation to capitalism (section 2). Finally, considerations about the need to advance in the construction of a more robust concept of de-growth and its real intentions are presented.

[3] It is, then, a discussion that only deepened in the recent period (although its roots is in the 1970s). The term de-growth "did not appear in any French dictionary of social sciences until 2006, although it was possible to find some entries for its correlates: "zero growth", "sustainable development" and, of course, "steady state". (LATOUCHE, 2012, p. 45).

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I. De-Growth: A Historical and Theoretical Review

The concept of de-growth is broad, therefore, difficult to be explained in a few words. In fact, according to Latouche (2012), de-growth is not a concept in itself, nor is it the opposite of growth. De-growth is a kind of political slogan, which emphasizes the importance of abandoning the search for growth as the ultimate goal[4]. In other words, de-growth is not an alternative, but a set of alternatives that challenge the society whose main objective is growth as an end in itself. This society is neither sustainable nor desirable.

De-growth gathers those who consider it essential to reduce the physical dimension of the economic system and can be defined in different ways, given the different currents of thought and approaches that use it to criticize the pattern of development based on economic growth. It can also be seen as a concept whose purpose is to break the consensus of the consumerist imagination, denouncing the false freedom and happiness that are sold through advertising. In short, what de-growth has in common in these different approaches is the idea of "consuming less to live better". (BAYON, FLIPO, SCHNEIDER, 2011).

The idea of de-growth recognizes that there are limits to the use of natural resources. Furthermore, its advocates are skeptical about the possibility of technology being able to universalize the consumption pattern of rich countries. If there are not enough resources for everyone to maintain a standard of living in the style of developed countries and no technology capable of doing it, then would the solution be a reduction in the world population? This reasoning has led many to accuse degrowth of being Malthusian. Bayon et al. (2011) refute this accusation by stating that the uncontrolled population increase is indeed a problem, but its regulation should be democratic, mainly through people's awareness and not in the way Malthus proposed it.[5]

Latouche (2009) states that de-growth society project is the only option capable of avoiding an ecological and human catastrophe. This catastrophe will happen, if we don't change in time, due to the incessant search for growth. To change the current society the main target would then be consumerism. But, on the contrary, current society's efforts are aimed at stimulating consumption. Among these, the main ones are credit and advertising. Advertising creates desires in consumers and encourages them to renew their manufactured goods, even if they are still in perfect conditions of use. On the other hand, credit is what allows the consumer's desires to be satisfied, even if their income is already compromised, that is, credit allows the expansion of consumption capacity.

Both advertising, which encourages insatiability for industrialized products, and programmed obsolescence, whose mechanisms lead to a compulsory expansion in consumption, create the disposable culture. Obsolescence provides less longevity for so-called durable goods, as well as promoting the creation of components, software and parts that are incompatible between different models and different brands, with a single objective: to increase (or minimally maintain) the level of consumption.[6] The consequences, however, are, on the one hand, an increase in the use of natural resources and, on the other, an increase in the amount of pollutants and waste arising from both the production of new goods and disposal of the old ones.

According to Latouche (2009) de-growth is a concrete and revolutionary utopia.[7] Its concrete proposals are outlined in the "vicious circle" of serene de-growth, represented by eight interdependent changes, namely:

(i). *Reassess:* changing society's values to face current challenges;
(ii). *Re-conceptualize:* changing values leads to another way of apprehending reality;
(iii). *Restructuring*: adapting the productive apparatus and social relations in terms of changing values;
(iv). *Redistribute:* distributing wealth and to granting access to natural heritage;
(v). *Relocate:* producing locally, as far as possible, products intended to meet the needs of the population;
(vi). *Reduce:* reducing the impact on the biosphere of our ways of consuming and producing, that is, reducing our ecological footprint;
(vii). *Reuse:* reducing programmed obsolescence;
(viii). *Recycle:* recycling what cannot be directly reused.

However, as Latouche (2009) argues, de-growth does not have a robust political program and needs great support from the population to: reduce the ecological footprint and energy waste, reduce

[4] The central point of degrowth is found in the critique of development, specifically through the "inversion of perspective with which the phenomenon of poverty and exclusion is read". (BONAIUTI, 2012, p.88).

[5] Latouche (2009) does not see overcrowding as the problem. The question is: knowing how to share resources in an equitable and ethical way.

[6] According to Löwy (2009), the problem is not excessive consumption by the population (as ecologists argue), nor is the solution a general reduction in consumption, especially in more developed countries. The problem is the way in which current consumption takes place, based on waste, ostentation, obsession with accumulation and mercantile alienation. The solution, therefore, is to end consumption based on these conditions.

[7] "The degrowth project is therefore a utopia, that is, a source of hope and dream. However, far from taking refuge in the unreal, it tries to explore the objective possibilities of its application. Hence the term "concrete utopia". (LATOUCHE, 2009, p.40).

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inequalities, transform productivity gains into time reduction and for the application of eco-fees.

Another approach that, similarly to the view on de-growth, derives from the discussion about the limits of economic growth as a fundamental engine of contemporary capitalist society, is the one that deals with the so-called steady state economy. Although it has already been addressed by classical economists such as Adam Smith and John Stuart Mill, the discussion of steady-state economics is brought to the fore more recently by the ecological economist Herman E. Daly. The latter, as a disciple of one of the precursors of the de-growth vision (Georgescu-Roegen), believes that the indiscriminate expansion of the economic product has serious limits in terms of generating non-negligible ecosystem impacts. However, unlike Georgescu, Daly is less skeptical about the phenomenon of growth. (KERSCHNER, 2010; MARTINEZ-ALIER et al., 2010; CECHIN & VEIGA 2010).

In this sense, instead of economic activity presenting itself as necessarily declining over time, in the steady state it would be defined as:

> constant stocks of physical wealth (arti-facts) and a constant population, each maintained at some chosen, desirable level by a low rate of throughput -i.e., by low birth rates equal to low death rates and by low physical production rates equal to low physical depreciation rates, so that longevity of people and durability of physical stocks are high. (DALY, 1974, pg. 15).

Thus, according to Cechin and Veiga (2010), the steady state could be interpreted as one in which the use of natural resources would be just enough to reproduce a constant amount of capital and population. Therefore, the improvements would no longer occur in quantitative terms, but in qualitative terms.

Qualitative changes would be represented by technological advances that would increase the incorporation of value into production, even though the amount of inputs used remains constant (TRAINER, 2016). Thus, “the value of total production may still increase without growth in physical throughput – as a result of qualitative development. Investment in quality improvement may yield a value increase out of which interest could be paid.” (Daly, 2008 *apud* Trainer, 2016).

This technological improvement would mean an increase in efficiency in the use of physical and biological resources, so that the product growth (in qualitative terms) becomes compatible with ecological sustainability. This movement of separation of economic growth from the growth in the use of production inputs, made possible by the advance of the technique, is called *decoupling*. While absolute decoupling would be the scenario in which output grows and the incorporation of inputs remains constant or decreases, relative decoupling would be related to the less than proportional growth of the need for inputs in relation to the output growth rate. (TRAINER, 2016). Development would, therefore, be achieved in the steady state if there were effectively a movement of distancing output growth in relation to the use of inputs.

Furthermore, as stated by Cechin and Veiga (2010), the steady state concept is strongly based on the idea that, from a given moment, the economic growth process starts to present high costs that compromise the well-being of future generations, which it would require a maintenance of the capital stock and the population in order to minimize the ecosystem impacts and the use of natural resources.

Thus, it is possible to highlight the divergences and congruences of this view in relation to the concept of de-growth. First, it is noteworthy that the latter is more related to the French-speaking world, while the steady state perspective is more linked to North American thought. Furthermore, while the de-growth proposal advocates for decreasing levels of consumption, especially in developed countries, the steady state view proposes a stabilization of population and per capita consumption, which implies the maintenance of capital stocks, the supply of labor and the use of resources for economic production. (MARTINEZ-ALIER et al., 2010).

This apparent incongruity, however, overshadows some points of compatibility between these two views. Authors such as Martínez-Alier (2010) and Kerschner (2010) indicate that these perspectives can be seen as compatible and complementary. Compatibility could be found, first, if the steady state situation is considered as the final stage of a degrowth process, which cannot be extended indefinitely. In this sense, de-growth should not be treated as the end of the process, but as a path by advanced countries to reach a situation of dynamic equilibrium similar to that of a steady state. Under these circumstances, with the decline of output and population in developed countries, a steady state situation could arise.

Finally, as in de-growth, the steady state perspective believes that it can adjust to the way capitalism works, which, in other words, would indicate the non-existence of the need to overcome the fundamental structures of this mode of production. In summary, Daly talks about this supposed compatibility: “growth is seen to be entirely subjective, optional, not built in capitalist economies. So it can be dispensed with, exorcised, and capitalism can carry on in something like "stasis." (SMITH, 2010).

However, even having stood out in the academic and political scenarios of the world, both the vision of de-growth and the steady-state economy are targets of various types of criticism, which question the theoretical consistency of these approaches and, mainly, their compatibility in relation to the functioning of the capitalist system. In the next topic the most relevant criticisms of these approaches are explained.

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II. Critical Perspectives on De-Growth

As stated above, the conception of de-growth is criticized in several aspects. The first type of criticism to be highlighted is the one that calls into question the internal foundations and the structuring of the very concept of de-growth. On the inconsistencies and limits of this formulation, the work of Schwartzman (2012) is first evidenced. For this author, even though the works on the theme of de-growth present an important discussion about the social and environmental limits of economic growth, the arguments presented are not capable of offering a political agenda capable of confronting the economic and ecological crisis in a forceful way. The main problems of this approach would be, therefore, the failure to analyze the qualitative aspects of economic growth and the material requirements to provide high levels of quality of life. Furthermore, another problem that derives from this view is the emphasis on the local economy without recognizing the urgency of developing a transnational concept and solution.

With regard to the consideration of qualitative and quantitative aspects of growth, Schwartzman (2012) states that proponents of de-growth fail to treat output growth as something homogeneous. For him, the fundamental question must be raised about what type of growth is being talked about and what types of impacts each type of growth would have on ecological and health aspects. In his words, it is necessary to question, for example, what type of growth would be sustainable in terms of the preservation of biodiversity and what type of production would be most useful for increasing the well-being of humanity.

On the other hand, the author emphasizes that the de-growth program would be available only to a small minority of the world population, namely, the countries of the North. At best, the de-growth program would be useful to spur the emergence of local energy and food cooperatives, which would represent the resurgence of the bankrupt hippy community of the 1960s. What there should be, in this author's view, is a transnational ecosocialist movement capable of facing the agents that prevent the fight against the elements that threaten the ecosystem balance. (Schwartzman, 2012).

Another criticism made by this author is that the formulators of the degrowth concept point out the failures and limits of the capitalist mode of production without, however, presenting anything that could replace it. The most that is done is to point out the need to create other forms of economic and social organization more suited to the new conditions. (Schwartzman, 2012).

Foster (2011) points out that even more problematic is the view of de-growth in underdeveloped countries. This author explains Latouche's (2006) argument that the degrowth program should be applied to both advanced and underdeveloped countries, so that the latter cease to pursue the strict objective of economic growth in time. According to Latouche himself, "southern countries need to escape their economic and cultural dependence on the North and rediscover their own histories—interrupted by colonialism, development and globalization—to establish distinct indigenous cultural identities." (LATOUCHE, 2006 *apud* FOSTER, 2011).

Also according to Foster (2011), for Herman Daly it would be a waste of time and a moral delay to advocate steady state (and also de-growth) economic programs for underdeveloped countries before the overdeveloped nations have at least started to decrease their growth rate population and consumption growth rate. The starting point for this type of procedure should therefore be the developed countries.

Finally, Bergh and Kallis (2012) highlight that another criticism of the de-growth view would be that related to the fact that there would not be a single and consistent measurement to measure the scale of the economy, making the idea of resizing become very vague. Thus, when talking about de-growth, one can be talking about product, consumption or hours worked. The exponents of this view, however, do not believe that the inexistence of a single parameter would be a fundamental obstacle.

Having presented the criticisms about the foundations and the concept of de-growth, we begin to explain the questions about the compatibility between de-growth and the capitalist mode of production. In other words, would it be possible to implement a program of this nature and still preserve the structuring pillars of a market economy?

Marx, in his book *The Capital*, exposes the essence of a capitalist economy through the sphere of circulation of capital: D-M-D', where the final amount of money is greater than the initial amount. The implication of this concept is that capital to be capital it will always seek its accumulation, that is, it will always increase its volume. Thus, the capitalist will reinvest part of his profits to produce new products and obtain new profits. The process is endless.

In order for this process of constant reinversion of profits to occur and, consequently, of constant increase in the volume of global capital, it is necessary that consumption also increase, as this is what will enable the transformation of the commodity into capital plus profit. Therefore, there are the following relationships: consumption growth is a fundamental part of maintaining capital accumulation; capital accumulation is the basis of the capitalist economic system; therefore, the continuous increase in consumption is fundamental for the maintenance of capitalism; finally, as the systematic increase in consumption (on a world level) means an increase in

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economic growth, then economic growth, by providing the accumulation of capital, is the mainstay of the capitalist economy.

For Fotopoulos (2007), the degrowth project represents a dialectical junction between anti-systemic and reformist movements, which results in the construction of a critical view, which does not advocate the abolition of the market economy system, but which proposes to reduce its scope. According to Latouche (2007)

> Drastically reducing environmental damage does mean losing the monetary value in the material goods. But it does not necessarily mean ceasing to create value through non-material products. In part, this could keep their market forms. Though the market and profit can still be incentives, the system must no longer revolve around them. (LATOUCHE, 2007 apud FOTOPOULOS, 2007).

However, according to Fotopoulos (2007), although the proponents of this view believe in the compatibility between de-growth and the perpetuation of capitalism, it should be remembered that modern society is strongly based on maximizing economic growth for its reproduction. This is basically based on two fundamental elements, namely, production and consumption.

First, with regard to production, it seems clear that the dynamics of a market economy imply a constant expansion of production so that profits are maximized. It would be contradictory, therefore, to consider a market economy based on non-growth, not only because there would be great resistance from transnational companies, which would move from countries that adopt this type of program, but also because of the simple fact that the economy market is incompatible with zero growth. It does not mean, however, that there could not be a zero-growth society. What is meant is that, given the existence of the capitalist mode of production, it would be impossible to keep it running without one of its main engines, economic growth. (Fotopoulos, 2007).

On the other hand, when consumption is considered, it is clear that its decrease is extremely undesirable, as it would represent a necessary counterpart for carrying out long and stressful working hours. A forced reduction in consumption would represent for society, therefore, a deprivation in relation to one of the elements that justifies the perpetuation of the market society, namely, consumerism. (Fotopoulos, 2007).

For this author, the incompatibility between de-growth and capitalism would become clear from the historical analysis and investigation of the system dynamics. If there is no market economy system that has not been based on maximizing economic growth, then it must be assumed that de-growth could not be constituted as a mere change in the values of society and that, moreover, it could not coexist with a market system.

Fotopoulos (2007) also presents the proposals of the de-growth program and what would be its impacts within a capitalist system. Starting with the proposal to bring material production back to the levels of the 1960s and 1970s, which would lead to a dramatic increase in unemployment and poverty among the most vulnerable social groups.[8] Second, the internalization of transport costs, which would transform private and air transport modes into luxury goods accessible only to the wealthier classes. Third, the return to small-scale agricultural production, which would increase food prices, once again affecting the poorest groups. Finally, reducing energy waste by three quarters through the use of a tax system, which could reduce material and energy costs, but at the same time increase material consumption.

As Trainer (2010) points out, if effective efforts were made to combat the negative effects of growth, the required action should be so drastic and widespread, that a new type of system, other than the market, would emerge. On the other hand, the proposals developed by the advocates of de-growth would cause a dramatic reduction in business, which, apart from being intolerable on the part of large companies, would not be achieved without major state regulation.

Another important consequence of a zero-growth economy, according to Trainer (2010), refers to the non-existence of interest payments. In the absence of this element, the existence of only a fixed and stable amount of capital would be necessary, so that the investment would be put into operation just to face the depreciation.

In this scenario, the government would be incapable of implementing monetary policy, having to stimulate the economy through indiscriminate and coercive decisions, approaching a type of planned control. Furthermore, there would be no need for the creation of money, as a constant amount would be sufficient to carry out the purchase and sale transactions. In this way, the banking market would be dramatically transformed, as they would be unable to create new currency. (Trainer, 2010).

Finally, given that in the current economic system, growth is essential to prevent unemployment from growing, considering the constant technological advances, in a zero-growth economy a constant amount of product would only be achieved at the expense of a reduction in the workforce. (Trainer, 2010).

[8] Knowing that the volume of capital has multiplied several times since the 1970s, then the question to be asked is: with such a large reduction in production, what would happen to this volume of capital? A part of it would not find alternatives to continue its accumulation process, resulting in acute economic crises.

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Trainer (2010, pg.11) summarizes what then would be the nature of the capitalist system and how it is fundamentally based on the logic of growth and accumulation: "Capitalism is by definition about growth. Its essential characteristic is the investment of capital in order to make as much profit as possible, to re-invest next year in order to make as much profit as possible... in a never ending spiral of capital accumulation".

The key to the incompatibility between de-growth and capitalism would therefore lie in the fact that growth would be an inescapable consequence of the market system, as one enters into it with the intention of maximizing, selling at the highest price, buying at the lowest, investing in sectors in that the rates of return are more attractive, in other words, seeking the highest possible valuation. In this way, according to Trainer (2010), in the market there is either growth or death, since all the others who participate in it use this same logic.

III. Concluding Remarks

Considering the recent nature of the concept of de-growth, the purpose of this article was to carry out a literature review, trying to explain the fundamental structure and the main proposals of the degrowth program, in addition to presenting the most relevant critical arguments in relation to this approach.

What stands out, first, is the broad character of the concept (or political slogan) of degrowth, which intends to lessen the importance and indispensability of the objective of growth in contemporary capitalist society. The proposal would therefore be to resize the economic system in order to make it "fit" within the limits set by the terrestrial ecosystem.

This proposal, however, due to its comprehensive and abstract nature, ends up being the target of several criticisms regarding its own internal consistency - Impossibility of analyzing the qualitative aspects of growth, the regional and fragmented character of the analysis and the generic application of the program for advanced countries and underdeveloped – and, mainly, regarding the possibility of implementing this proposed type in a system whose fundamental gear would be accumulation or economic growth.

In summary, the most relevant critical arguments seem to indicate a contradiction in the formulation of the de-growth concept, since: i) the reduction in growth, in a growing economy, would have perverse effects; ii) therefore, de-growth should only be considered in a de-growth society; iii) however, the concrete measures of de-growth end up generating a reduction in growth, causing the negative effects warned by the author, since today's society is a society of consumption, of growth.

Thus, the need to advance in the construction of the idea of de-growth seems evident, strengthening the internal structure of this conception and evaluating the effectiveness of implementing such a program in a capitalist production system.

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Educational Mismatches and Labor Market Impact in Cameroon

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Abstract- The objective of this study is to capture the effect of educational mismatches on earnings in Cameroon. Based on data from the Fourth Cameroon Household Survey (ECAM IV), this study uses the IV-2SLS estimation method proposed by Wooldridge (2010) to correct for both sample selection and endogeneity issues. At the descriptive level, the results show that 63.3% and 27.6% of graduates are overeducated and horizontally maladjusted, respectively. Also, 45.95% and 19.77% of the workers are respectively in single mismatch (vertical or horizontal mismatch only) and double mismatch. Econometrically, the results reveal that vertical mismatch tends to reduce the wage by 0.39%; horizontal mismatch by 0.4% and double mismatch by 0.41%. We find that, although the difference is small, horizontal mismatch has a more negative impact on earnings in the Cameroon market than vertical mismatch. Moreover, workers with both types of mismatch suffer more from the wage penalty than those with only one form of educational mismatch.

Keywords: *educational mismatch, wages, cameroon.*

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Educational Mismatches and Labor Market Impact in Cameroon

Inadéquations Éducatives Et L'impact Sur Le Marché Du Travail Au Cameroun

Dabo Joseph Doubla [α] & Abessolo Yves André [σ]

Résumé- **L'objectif de cette étude est de saisir l'effet des inadéquations éducatives sur la rémunération au Cameroun. Basée sur les données de la Quatrième Enquête Camerounaise auprès des Ménages (ECAM IV), cette étude s'appuie sur la méthode d'estimation IV-2SLS proposée par Wooldridge (2010) pour corriger à la fois les problèmes de sélection de l'échantillon et d'endogénéité. Au niveau descriptif, les résultats montrent que 63,3 % et 27,6 % des diplômés sont respectivement suréduqués et inadaptés horizontalement. Aussi, 45,95 % et 19,77 % des travailleurs sont respectivement en situation d'inadéquation simple (inadéquation verticale ou horizontale uniquement) et en situation de double inadéquation. Sur le plan économétrique, les résultats révèlent que l'inadéquation verticale a tendance à réduire le salaire de 0,39% ; l'inadéquation horizontale de 0,4 % et la doubla inadéquation de 0,41 %. Nous constatons que, bien que la différence soit faible, l'inadéquation horizontale impacte plus négativement la rémunération sur le marché du Cameroun que l'inadéquation verticale. Par ailleurs, les travailleurs présentant ces deux types d'inadéquation subissent plus la pénalité salariale que ceux présentant une seule forme d'inadéquation éducative.**

Motsclés: inadéquation éducative, rémunération, cameroun.

Abstract- **The objective of this study is to capture the effect of educational mismatches on earnings in Cameroon. Based on data from the Fourth Cameroon Household Survey (ECAM IV), this study uses the IV-2SLS estimation method proposed by Wooldridge (2010) to correct for both sample selection and endogeneity issues. At the descriptive level, the results show that 63.3% and 27.6% of graduates are overeducated and horizontally maladjusted, respectively. Also, 45.95% and 19.77% of the workers are respectively in single mismatch (vertical or horizontal mismatch only) and double mismatch. Econometrically, the results reveal that vertical mismatch tends to reduce the wage by 0.39%; horizontal mismatch by 0.4% and double mismatch by 0.41%. We find that, although the difference is small, horizontal mismatch has a more negative impact on earnings in the Cameroon market than vertical mismatch. Moreover, workers with both types of mismatch suffer more from the wage penalty than those with only one form of educational mismatch.**

Keywords: educational mismatch, wages, cameroon.

I. Introduction

De tout temps et en tout lieu, les individus acquièrent l'éducation soit pour eux-mêmes, soit pour influencer le fonctionnement du marché du travail. Dans ce dernier cas, ils décident de participer au marché du travail (Abessolo et Nga Ndjobo, 2017). Cependant, cette participation n'est pas automatique surtout si l'on ne tient pas compte d'autres facteurs, en particulier de la manière dont l'éducation acquise au cours de la scolarité correspond aux besoins du marché du travail. C'est dans ce contexte que les travaux pionniers portant sur l'inadéquation entre l'éducation et l'emploi, appelée inadéquation éducative (Freeman, 1976) ont pour fondement empirique, le constat d'une baisse de salaire des diplômés américains. En effet, dans une étude fort révélatrice, Freeman (1976) dans son livre « The overeducated Americans » a mis en évidence la suréducation (inadéquation verticale[1]) comme facteur pouvant expliquer la baisse des salaires des diplômés universitaires dans les années 1960 et 1970. Ainsi, l'inadéquation éducative est un concept qui met en relief l'interaction entre l'offre de diplômés du système éducatif et la demande de travailleurs instruits sur le marché du travail (Eurostat, 2016).

Par définition, l'inadéquation éducative fait référence à une situation dans laquelle l'éducation des travailleurs ne correspond pas à ce qui est requis par leur emploi (Quintini, 2011). Il existe deux formes d'inadéquation éducative : 1- Une inadéquation entre les niveaux d'éducation, appelée inadéquation verticale et 2- Une inadéquation entre les domaines d'études, appelée inadéquation horizontale. L'inadéquation horizontale implique que les professions des personnes ne correspondent pas à leurs domaines d'études. Par rapport à la suréducation, l'inadéquation horizontale est cependant encore récente dans la littérature, car les chercheurs ne se sont intéressés à cette inadéquation qu'à partir de la publication de Robst (2007) sur l'inadéquation entre la filière universitaire et les professions des diplômés aux États-Unis.

Trois principales questions ont animé le développement de la littérature économique dédiée à l'étude des inadéquations éducatives: Premièrement, comment mesurer les inadéquations éducatives aux niveaux individuel et agrégé ? Deuxièmement, quels sont les facteurs qui expliquent l'inadéquation de

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[1] L'inadéquation verticale peut également faire référence à la sous-éducation, mais dans cette thèse, nous nous concentrons uniquement sur la suréducation pour ce type d'inadéquation.

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l'éducation aussi bien verticale qu'horizontale? Troisièmement, quels sont les impacts des inadéquations éducatives aux niveaux micro-économique et macroéconomique ? (Vichet, 2018). C'est cette troisième interrogation qui fait l'objet de notre étude notamment sous l'angle microéconomique. Sous cet angle justement, l'inadéquation éducative a des effets potentiellement négatifs sur la fonction de satisfaction de l'employé et celle de l'entreprise. Au niveau de l'employé, elle est susceptible d'affecter la transition vers le marché du travail, les salaires, de réduire la satisfaction au travail et d'augmenter la probabilité de changements fréquents d'emploi (Ueno et Krause, 2018; Mpendulo et Mang'unyi, 2018; Battu et Bender, 2020; Putri et Febriani, 2020). Au niveau de l'entreprise, l'incapacité à trouver des travailleurs détenant des qualifications requises pour effectuer les tâches requises a des répercussions importantes sur le dynamisme, la productivité et les bénéfices des entreprises, la compétitivité, la croissance et, parfois, la survie même de ces entreprises. Autrefois patent dans les économies développées, le phénomène d'inadéquation éducative l'est davantage dans les économies en voie de développement en raison d'une part, de leurs populations sans cesse croissantes et aux défis qu'elles imposent et, d'autre part, le niveau d'instruction moyen de la population qui a considérablement augmenté.

S'il apparaît clairement dans littérature que l'inadéquation éducative affecte les mécanismes (emploi, rémunération, satisfaction, productivité, etc.) qui régissent les interactions sur le marché du travail, l'importance de ces effets et les mécanismes sous-jacents ne sont pas toujours clairs. Aussi, des analyses plus poussées s'avèrent justifiées dans tous les pays y compris le Cameroun. C'est à l'aune de ce fait au demeurant inquiétant que l'objectif de cette étude est d'apporter de réponses à la question quel est l'effet des inadéquations éducatives sur la rémunération au Cameroun ?

II. Contexte de L'étude

La structure du marché du travail camerounais, à l'instar des autres pays, a connu d'importantes mutations ponctuées des vagues de déséquilibres plus ou moins accrus. Avant l'avènement de la crise économique des années 80, le marché du travail camerounais était caractérisé par des emplois dans le secteur agricole avec l'État comme pourvoyeur principal d'emploi (Touna Mama, 2008). Ainsi, les taux de chômage étaient relativement bas, moins de 6 % en moyenne. La situation s'est vite dégradée avec la survenue de la crise qui a entrainé une hausse vertigineuse du taux de chômage atteignant jusqu'à 24,6 % en 1993. Par ailleurs, la proportion d'emplois dans le secteur informel s'est considération accrue.

En effet, le marché du travail camerounais caractérisé par le développement des politiques actives d'emploi fait face aujourd'hui à deux faits majeurs. Le premier est lié à la population sans cesse croissante et aux défis qu'elle impose. Le second fait, pas de moindre, concerne le niveau d'instruction moyen de la population qui a considérablement augmenté. Le taux net moyen de scolarisation dans l'enseignement primaire, secondaire et supérieur a atteint 78 %, 35 % et 10 %, respectivement, en 2017, contre 60 %, 21 % et 5 % en 2000 (UNESCO, 2019). Si le Cameroun peut tirer profit de ce dividende démographique et si la part croissante de jeunes mieux éduqués peut aider le pays à combler son déficit de productivité, il y a cependant lieu de s'interroger non seulement sur la qualité de l'éducation acquise par ces jeunes diplômés, mais aussi sur la capacité d'absorption du marché de l'emploi en général (Monga et *al*., 2019). En effet, bien que le pays ait alloué des ressources considérables à l'amélioration de la qualité de l'éducation (en moyenne, ils ont consacré 0,78 % du PIB à l'enseignement supérieur, contre 0,66 % dans d'autres pays en développement (Devarajan et *al*., 2011), il continue d'afficher des résultats scolaires insatisfaisants comme la plupart des autres pays africains.

Cette insatisfaction est surtout due à l'inadéquation de l'éducation aux besoins du marché du travail aussi bien au niveau quantitatif (inadéquation verticale) qu'au niveau qualitatif (inadéquation horizontale). Des données issues de la Quatrième Enquête Camerounaise auprès des Ménages (ECAM IV), il ressort que que 63,3 % et 27,6 % des diplômés sont respectivement suréduqués et inadaptés horizontalement. Aussi, 45,95 % et 19,77 % des travailleurs sont respectivement en situation d'inadéquation simple (inadéquation verticale ou horizontale uniquement) et en situation de double inadéquation.

Si près de 45,95% de la population occupée sont en situation d'inadéquation éducative, ce phénomène touche une forte proportion des actifs résidant dans la zone rurale. Environ 44 % (respectivement 13 %) des actifs vivant dans la zone rurale (respectivement dans la zone urbaine) sont en situation d'inadéquation horizontale. Par ailleurs, environ 20 % (respectivement 5 %) des actifs vivant dans la zone rurale (respectivement dans la zone urbaine) sont en situation d'inadéquation verticale (ECAM IV).

III. Fondements Théoriques de L'effet des Inadéquations Educatives Sur la Rémunération

Les premières études sur les inadéquations éducatives et particulièrement le déclassement sont l'œuvre d'économistes américains et datent des

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années 1970. Cette période est marquée par l'accès des enfants du *baby-boom*[2] au marché de l'emploi, dans un contexte où l'adaptation aux nouvelles technologies nécessite un personnel hautement qualifié (Smith, 1986). Dès lors, quatre grandes théories ont été avancées pour expliquer les effets salariaux observés des inadéquations éducatives. Il s'agit de la théorie du capital humain, de la théorie des affectations, de la théorie des compétences hétérogènes et de la théorie institutionnelle.

Tout d'abord, la théorie du capital humain affirme qu'une productivité plus élevée se traduit par des gains plus élevés, ce qui entraîne une relation positive entre les salaires et le capital humain (Becker, 1964). Cette relation est représentée par une équation connue sous le nom d'équation salariale de Mincer, dans laquelle le niveau d'éducation atteint affecte les salaires (Mincer, 1974). Cela signifie qu'à l'équilibre, il ne doit pas y avoir de sous-utilisation de son stock de capital humain. Par conséquent, la suréducation ne peut s'expliquer par la théorie du capital humain que si elle est un phénomène temporaire. Ensuite, la théorie de la concurrence pour l'emploi développée par Thurow (975) soutient que l'inadéquation éducative n'impacterait pas la rémunération sur le marché du travail notamment les salaires. En effet, cette théorie suppose que les caractéristiques de l'emploi déterminent les salaires puisque la plupart des compétences des travailleurs sont acquises sur le lieu de travail et non par l'éducation formelle.

Une autre explication se trouve dans les modèles hédonistes/affectationnels (Sattinger, 1993): selon ces modèles, les variations de revenus ne sont pas expliquées par le capital humain ou les caractéristiques de l'emploi pris individuellement. Au contraire, les variations des salaires sont déterminées dans le cadre d'une équation de prix hédonique comprenant des paramètres de demande et d'offre. Dans le même ordre d'idées que la théorie de concurrence pour l'emploi développée par Thurpw (1975), la théorie du signal (Spence, 1973 ; Mankiw et *al*., 2014) suggère que les individus investissent dans l'éducation pour envoyer des signaux aux employeurs sur leurs capacités. Sur le plan empirique, trois enseignements se dégagent des travaux qui y sont menés :

- *Effet négatif des inadéquations éducatives sur la rémunération sur le marché de l'emploi*

Freeman (1976) a été le premier à étudier le phénomène de suréducation motivé par la diminution du rendement de l'éducation sur le marché du travail nord-américain[3]. Plus tard, Duncan et Hoffman (1981) ont introduit un modèle dans lequel les salaires sont fonction de l'éducation et ont divisé l'éducation en trois parties: suréducation, sous-éducation et éducation requise, toutes mesurées en années. Pour analyser l'effet de chacune de ces formes sur les salaires, ils ont adapté le modèle utilisé la version étendue de l'équation salariale de Mincer. Une autre approche utilisée par les études empiriques sur l'inadéquation de l'éducation est la spécification de Verdugo et Verdugo (1989). Contrairement à l'approche de Duncan et Hoffman, cette spécification prend en compte le niveau d'éducation atteint par le travailleur, une variable fictive pour la sur-éducation et une variable fictive pour la sous- éducation[4]. Par conséquent, la discussion sur la sur/la sous-éducation est menée par des faits stylisés :

(i). les travailleurs suréduqués ont des salaires plus bas que ceux qui ont le même niveau d'éducation, mais au lieu de cela, ils occupent des emplois qui exigent exactement le niveau d'éducation qu'ils ont atteint. Cependant, ces travailleurs suréduqués gagnent plus que leurs collègues qui ne sont pas suréduqués;

(ii). les travailleurs sous-éduqués ont des salaires plus élevés que ceux qui ont le même niveau d'éducation et occupent des emplois qui exigent le niveau exact qu'ils ont. Malgré cela, ces travailleurs sous-éduqués perçoivent des salaires plus élevés que leurs collègues qui ont le niveau d'éducation requis ou plus élevé.

Battu et Bender (2020) soutiennent que les personnes surqualifiées ont généralement des revenus et une productivité plus faibles, une moindre satisfaction au travail et une plus grande mobilité professionnelle.

- *Effet positif des inadéquations éducatives sur la rémunération du marché de l'emploi*

Certaines études ont montré que les inadéquations éducatives, particulièrement la

[2] Ce terme est utilisé pour qualifier le taux de fécondité excessivement élevé, qui a atteint un sommet en 1957, alors qu'il s'établit à 3,77. Il connaîtra une baisse notable à partir de 1964, identifiée généralement comme l'année où le « *baby-boom* » se termine aux *États-Unis.* En tout, 76,4 millions d'Américains auraient vu le jour entre 1946 et 1964.

[3] Selon Freeman (1976), cela s'explique par l'augmentation de l'offre de main-d'œuvre plus instruite par rapport à la demande de travail. Smith et Welch (1978) ont ajouté deux années au début et à la fin de la période utilisée par Freeman. Les auteurs ont trouvé des résultats moins prononcés et montrent que les résultats sont plus cohérents avec un marché du travail surpeuplé pour les nouveaux arrivants en raison de cohortes de taille plus importante qu'avec une situation de suréducation.

[4] Des études utilisant l'approche de Duncan et Hoffman ont montré que les rendements de la suréducation sont positifs, tandis que les rendements de la sous-éducation sont négatifs (Sicherman, 1991; Hartog, 2000; Bauer, 2002; Rubb, 2003 ; Dolton et Silles, 2008; Tsai, 2010). À l'inverse, les études utilisant l'approche de Verdugo et Verdugo ont constaté le contraire, la suréducation a un effet négatif sur les revenus et la sous-éducation a un effet positif (Rubb, 2003; Di Pietro et Urwin, 2006; Green et McIntosh, 2007; S'anchez-S'anchez et McGuinness, 2015).

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suréducation, ont un effet positif sur les salaires des travailleurs (Verdugo et Verdugo, 1989; Sánchez-Sánchez et McGuinness (2015); Di Pietro and Urwin (2006)).

- *Effet mitigé des inadéquations éducatives sur la rémunération du marché de l'emploi*

Le troisième enseignement rapporte l'effet mitigé des inadéquations éducatives sur la rémunération. Sellami, et *al*., 2017 ont étudié l'impact différentiel de combinaisons alternatives d'inadéquations éducatives horizontales et verticales sur les salaires. En utilisant des données de panel pour les diplômés belges, ils considèrent le rôle de l'hétérogénéité non observée des travailleurs. L'erreur de mesure aléatoire dans les deux types d'inadéquation est prise en compte en adoptant des techniques de variables instrumentales. Nous constatons systématiquement dans leur étude que les individus suréduqués sans domaine d'étude ne gagnent pas plus que les travailleurs suffisamment éduqués ayant un niveau d'éducation similaire. Cependant, pour les individus qui travaillent en dehors de leur domaine d'études, une telle pénalité salariale n'est pas toujours observée une fois pris en compte l'hétérogénéité non observée et l'erreur de mesure aléatoire. Dans certains cas, l'inadéquation horizontale semble même être financièrement bénéfique pour le travailleur.

Sitorus et Wicaksono (2020) parviennent dans leurs études à la conclusion selon laquelle les salaires de bas niveau sont dominés par les travailleurs ayant un niveau d'éducation insuffisant. En revanche, les salaires les plus élevés sont ceux des travailleurs suréduqués.

IV. Approche Méthodologique

Il s'agit dans ce paragraphe, de spécifier notre modèle de base, et par la suite, définir les variables du modèle.

a) *Spécification du modèle*

Pour identifier l'impact des inadéquations éducatives sur la rémunération au Cameroun, nous empruntons le chemin suivi Morsy et Mukasa (2019)[5] mais en suivant la spécification faite par Vichet (2018) dont la spécification du modèle de base ci-dessus présenté est la suivante.

$$\ln w_i = ax_i + binadeq_{ij} + \theta_i$$

Où *lnw* désigne les salaires observés (en logarithme), x le vecteur des variables indépendantes, *inadeq* reflète la variable catégorielle observée des inadéquations éducatives (j=0, 1, 2), définit le terme d'erreur, et a et b sont des paramètres inconnus, de sorte que b représente l'effet estimé de l'inadéquation des études sur les salaires.

Selon cette équation, les inadéquations éducatives sont parfaitement exogènes, une situation qui est clairement contredite par les recherches antérieures et les statistiques descriptives de la section précédente. Pour tenir compte de l'endogénéité potentielle du niveau des inadéquations scolaires, cette étude propose plutôt d'estimer un modèle de correction du biais de sélection.

b) *Mesures des Variables et Source des Données*

Les données utilisées pour l'estimation sont annuelles. Elles proviennent essentiellement de la quatrième Enquête Camerounaise auprès des Ménages (ECAM 4) qui à partir d'un échantillon d'environ 13 000 ménages produit des informations sur les conditions de vie des populations. Compte tenu du cadre théorique ainsi choisi et au regard des études théoriques et empiriques précédentes et des données disponibles, deux types de variables empiriques sont utilisées dans les estimations: la variable expliquée ou dépendante et les variables explicatives ou indépendantes, particulièrement la variable d'intérêt.

La variable dépendante dans notre fonction de gains est la rémunération mesurée par le logarithme des salaires. Notre variable explicative d'intérêt est l'inadéquation éducative qui, comme nous l'avons précisé précédemment, peut être peut être verticale ou horizontale. L'inadéquation verticale appelée aussi suréducation[6] apparaît lorsque les diplômés occupent des emplois ayant requis un niveau moins élevé que ce qu'ils possèdent. Ainsi, la suréducation notée (*inadeqvert)* est une variable Dimmy qui prend la valeur 1 si le niveau d'études l'actif est supérieur au niveau requis par l'emploi occupé et 0 par ailleurs. L'inadéquation horizontale (*inadeqhor)*, quant à elle est définie dans différents documents comme l'inadéquation entre l'emploi et l'éducation ou entre l'éducation et la profession. Lorsque l'emploi ne correspond à aucune formation reçue, alors il y a

[5] Ces auteurs ont étudié l'incidence de l'inadéquation des compétences et de l'éducation des jeunes Africains en marché du travail. Les résultats de leurs estimations ont révélé que la surqualification et la suréducation sont associées à une pénalité salariale et que la sous-éducation entraîne une prime salariale. En outre, la surqualification et la suréducation réduisent la satisfaction professionnelle et augmentent la probabilité que les jeunes cherchent un emploi. Par ailleurs, approche par pseudopanel qu'ils ont entreprise suggère également que l'inadéquation des compétences et de l'éducation des jeunes est persistante dans le temps et que les jeunes dont les compétences sont inadéquates sont plus susceptibles de passer à des emplois mieux adaptés que les jeunes dont l'éducation est inadéquate. Enfin, leurs résultats montrent que le chômage a un effet de cicatrisation pour les jeunes sous-qualifiés et à la fois un effet de cicatrisation et un effet de tremplin pour les jeunes surqualifiés et sur-éduqués.

[6] L'inadéquation verticale peut être une « souséducation » ou une « suréducation ». Mains dans le cadre de cette étude, nous nous intéresserons uniquement à la « suréducation ».

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inadéquation horizontale et la variable « *inadeqhor* » prend la valeur 1 ; et 0 sinon.

c) Méthode d'estimation

La méthode que nous utilisons pour estimer l'effet des inadéquations éducatives est celle des variables instrumentales notamment la méthode de Doubles moindres carrés ordinaires (IV- 2SLS). En effet, l'une des hypothèses des moindres carrés ordinaire commande l'absence de corrélation entre les variables explicatives et le résidu dans le modèle théorique. On parle d'endogénéité lorsque cette hypothèse est violée. La littérature établie de manière formelle un biais d'endogeneité lié à la corrélation entre les transferts de fonds des migrants et le résidu. Effectuer une simple régression MCO nous donnerait des résultats non valides.

V. Présentation et Analyse des Résultats Econométriques

a) Présentation des Résultats des Estimations

Pour bien cerner l'effet des inadéquations éducatives sur le fonctionnement du marché du travail au Cameroun notamment sur la rémunération, nous avons procédé en trois étapes. D'abord nous avons estimé l'effet de l'inadéquation verticale ensuite, l'effet de l'inadéquation horizontale et enfin l'effet de la double inadéquation (verticale et horizontale) sur la rémunération au Cameroun. Les tableaux ci-après résument les différents résultats obtenus à cet effet.

Tableau 1: Résultats de l'estimation de l'effet de l'inadéquation verticale sur la rémunération

Variables	IV-2SLS	IV-GMM
Inadéquation verticale (*inadeqvert*)	-0,39*** (0,10)	-0,401*** (0,09)
Expérience professionnelle (*expprof*)	0,10*** (0,01)	0,099*** (0,01)
Secteur privé (*secpriv*)	0,055*** (0,012)	0,051*** (0,017)
Secteur public (*secpub*)	0,029*** (0,010)	0,029*** (0,0103)
Taille de l'entreprise (*tailent*)	0,015 (0,009)	0,015 (0,011)
Travailleur avec contrat de travail (*avecCD*)	0,03*** (0,10)	0,034*** (0,010)
Travailleur sans contrat de travail (*sansCD*)	-0,01 (0,009)	-0,013 (0,0091)
Manœuvre (*manvre*)	0,008 (0,007)	0,008 (0,007)
Ouvrier (*ouvrier*)	0,057*** (0,009)	0,058*** (0,011)
Ouvrier qualifié (*ouvqualif*)	0,072*** (0,009)	0,071*** (0,011)
Agent de maitrise (*agenmtrse*)	0,078*** (0,012)	0,078*** (0,015)
Cadre (*cadre*)	0,618*** (0,01)	0,618*** (0,01)
Niveau de scolarisation (*nivsco)*	0,004 (0,005)	0,004 (0,005)
Genre (*genr)*	0,0006 (0,001)	0,0006 (0,001)
Constante (c)	0,043* (0,022)	0,044** (0,022)
R-square	0,4387	0,4374
Prob>chi2	0,0000	0,0000
Sargan P-value	0,0628	0,0628

**** seuil de signification à 1% ; ** seuil de signification à 5% ; * seuil de signification à 10%.*

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Tableau 2: Résultats de l'estimation de l'effet de l'inadéquation horizontale sur la rémunération

Variables	IV – 2SLS	IV-GMM
Inadéquation horizontale (*inadeqhoriz*)	-0,407*** (0,10)	-0,414*** (0,10)
Expérience professionnelle (*expprof*)	0,10*** (0,01)	0,10*** (0,01)
Secteur privé (*secpriv*)	0,055*** (0,012)	0,055*** (0,017)
Secteur public (*secpub*)	0,03*** (0,010)	0,03*** (0,010)
Travailleur avec contrat de travail (*avecCD*)	0,035*** (0,10)	0,036*** (0,010)
Travailleur sans contrat de travail (*sansCD*)	-0,006 (0,005)	-0,006 (0,004)
Manœuvre (*manvre*)	0,008 (0,007)	0,009 (0,007)
Ouvrier (*ouvrier*)	0,06*** (0,009)	0,058*** (0,011)
Ouvrier qualifié (*ouvqualif*)	0,074*** (0,009)	0,06*** (0,011)
Agent de maitrise (*agenmtrse*)	0,079*** (0,012)	0,078*** (0,015)
Cadre (*cadre*)	0,618*** (0,01)	0,618*** (0,01)
R-square	0,4362	0,4374
Prob>chi2	0,0000	0,0000
Sargan P-value	0,0638	0,0628

**** seuil de signification à 1% ; ** seuil de signification à 5% ; * seuil de signification à 10%.*

Tableau 3: Résultats de l'estimation de l'effet de la double inadéquation (verticale et horizontale) sur la rémunération

Variables	IV-2SLS	IV-GMM
Inadéquations verticale et horizontale (*doublinadeq*)	-0,4124*** (0,104)	-0,419*** (0,09)
Expérience professionnelle (*expprof*)	0,10*** (0,012)	0,104*** (0,01)
Secteur privé (*secpriv*)	0,055*** (0,012)	0,051*** (0,017)
Secteur public (*secpub*)	0,029*** (0,010)	0,029*** (0,0103)
Taille de l'entreprise (*tailent*)	0,015 (0,009)	0,015 (0,011)
Travailleur avec contrat de travail (*avecCD*)	0,034*** (0,10)	0,034*** (0,010)
Travailleur sans contrat de travail (*sansCD*)	-0,013 (0,009)	-0,013 (0,0091)

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Manœuvre (*manvre*)	0,008 (0,007)	0,0094 (0,007)
Ouvrier (*ouvrier*)	0,0598*** (0,009)	0,0602*** (0,011)
Ouvrier qualifié (*ouvqualif*)	0,074*** (0,009)	0,073*** (0,011)
Agent de maitrise (*agenmtrse*)	0,079*** (0,012)	0,079*** (0,015)
Cadre (*cadre*)	0,618*** (0,01)	0,618*** (0,015)
Niveau de scolarisation (***nivsco)***	0,004 (0,005)	0,005 (0,005)
Genre (***genr)***	0,0005 (0,001)	0,0003 (0,001)
Constante (c)	0,046* (0,022)	0,047** (0,022)
R-square	0,4355	0,4344
Prob>chi2	0,0000	0,0000
Sargan P-value	0,0638	0,0640

**** seuil de signification à 1% ; ** seuil de signification à 5% ; * seuil de signification à 10%.*

b) Analyse des Résultats

Avant de passer à l'interprétation des coefficients associés aux différentes variables, nous discuterons de la validité économétrique du modèle, des tests de validité des instruments et d'endogénéité. Ainsi, lur le plan économétrique, nos modèles sont globalement dignes d'intérêt. La probabilité prob>chi2 est à chaque fois inférieure à 5%, ce qui permet de conclure à une significativité globale du modèle. Également, les variables utilisées sont une à une significatives pour la plupart. Par ailleurs, le test de sur-indentification de Sargan est recommandé et utilisé dans plusieurs études pour tester la validité des instruments. Lorsque la P-value est supérieure à 5%, on accepte l'hypothèse nulle de validité des instruments. Effectivement, dans notre cas, nos P-value sont supérieures à 5%, preuve de la validité de nos instruments. Aussi, le modèle ne souffre plus d'aucun biais d'endogénéité vue que nos P- value sont inférieures à 5%.

À la suite des estimations, nous avons obtenu des résultats pour la plupart en conformité avec la littérature. Après avoir contrôlé la validité des différentes régressions, nous avons obtenu des résultats pour la plupart en conformité avec la littérature. On peut apercevoir que de manière générale, les inadéquations éducatives exercent une influence négative sur la rémunération au Cameroun.

Ainsi, l'inadéquation verticale a tendance à réduire le salaire de 0,39% ; l'inadéquation horizontale de 0,4 % et la doubla inadéquation de 0,41 %. Nous constatons que, bien que la différence soit faible, l'inadéquation horizontale impacte plus négativement la rémunération sur le marché du Cameroun que l'inadéquation verticale. Ceci peut s'expliquer par le fait les travailleurs qui détiennent des qualifications qui ne correspondent pas à celles requises par leur poste sont moins productifs que ceux détenant un niveau supérieur à celui requis par leur emploi mais qui disposent des qualifications requises. Par ailleurs, les travailleurs présentant ces deux types d'inadéquation subissent plus la pénalité salariale que ceux présentant une seule forme d'inadéquation éducative. Ljiljan et *al*. (2020), ont trouvé les mêmes résultats dans le contexte de la Bosnie-Herzégovine bien qu'ayant utilisé la méthode MCO. En effet, leurs résultats soutiennent fortement l'affirmation selon laquelle l'inadéquation entre l'éducation et l'emploi a un effet significatif sur le revenu net. Les travailleurs peuvent s'attendre à des différences de revenu net entre 13 % et 15 % si leur niveau d'éducation ne correspond pas à celui requis pour leur emploi.

Au-delà de la variable d'intérêt, les résultats de nos régressions révèlent que d'autres variables expliquent la rémunération sur le marché du travail au Cameroun. Il s'agit notamment d'une part des caractéristiques propres à l'individu (niveau de scolarisation, genre, expérience professionnelle, catégorie socioprofessionnelle et le contrat du travail) et d'autre part les caractéristiques liées à l'emploi (taille de l'entreprise, secteur d'activité).

Ainsi, le niveau de scolarisation de l'individu semble n'est pas expliquer la rémunération de l'employé sur le marché du travail au Cameroun. À ce sujet, selon la conception théorique élaborée par Becker (1964), les écarts de salaires s'expliquent par les différences de

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productivité. Celles-ci s'expliquent, à leur tour, par l'inégalité du capital humain accumulé par les individus, particulièrement au cours de leur scolarité. La réalité du marché du travail au Cameroun semble contredire cependant cette interprétation puisque l'on observe un excès d'offre de main d'œuvre reflété par le chômage de nombreux diplômés d'enseignements secondaire et supérieur. Dans une telle situation, la théorie néo-classique postule que les salaires baissent afin de réaliser l'équilibre sur le marché du travail. Comme on le sait, les salaires sont généralement rigides à la baisse, ce qui permet de conclure que la situation décrite par le phénomène d'inadéquation éducative est le reflet d'une imperfection dans le fonctionnement du marché du travail au Cameroun. Ceci peut s'expliquer par le fait que, dans une situation d'inadéquation verticale et plus précisément la suréducation, l'individu n'est pas embauché à son juste titre autrement ; son niveau d'étude est au-dessus de celui requis par son emploie. De ce fait, le niveau de scolarisation de l'individu n'est pas véritablement valorisé sur le marché du travail et par conséquent ne peut avoir un effet sur la rémunération.

VI. Conclusion

Il était question dans ce papier d'évaluer la nature l'effet des inadéquations éducatives sur la rémunéartion au Cameroun. À cet effet, nous nous sommes inspirés du modèle de Morsy et Mukasa (2019) mais en suivant la spécification faite par Vichet (2018). En utilisant des données de panel statique issues de l'enquête ECAM IV réalisée au Cameroun en 2014, les résultats des estimations économétriques faites par la méthode IV-2SLS indiquent que les inadéquations éducatives impactent négativement la rémunération sur le marché du travail au Cameroun. Nous trouvons que, bien que la différence soit faible, l'inadéquation horizontale impacte plus négativement la rémunération sur le marché du Cameroun que l'inadéquation verticale. En effet, l'inadéquation verticale a tendance à réduire le salaire de 0,39% ; l'inadéquation horizontale de 0,4 % et la doubla inadéquation de 0,41 %. L'implication économique de ces résultats démontre que les travailleurs qui détiennent des qualifications qui ne correspondent pas à celles requises par leur poste sont moins productifs que ceux détenant un niveau supérieur à celui requis par leur emploi mais qui disposent des qualifications requises. Par ailleurs, les travailleurs présentant ces deux types d'inadéquation subissent plus la pénalité salariale que ceux présentant une seule forme d'inadéquation éducative.

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We accept the manuscript submissions in any standard (generic) format.

We typeset manuscripts using advanced typesetting tools like Adobe In Design, CorelDraw, TeXnicCenter, and TeXStudio. We usually recommend authors submit their research using any standard format they are comfortable with, and let Global Journals do the rest.

Alternatively, you can download our basic template from https://globaljournals.org/Template.zip

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3. Ensure corresponding author's email address and postal address are accurate and reachable.
4. Manuscript to be submitted must include keywords, an abstract, a paper title, co-author(s') names and details (email address, name, phone number, and institution), figures and illustrations in vector format including appropriate captions, tables, including titles and footnotes, a conclusion, results, acknowledgments and references.
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3. Final approval of the version of the paper to be published.

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Acknowledgments

Contributors to the research other than authors credited should be mentioned in Acknowledgments. The source of funding for the research can be included. Suppliers of resources may be mentioned along with their addresses.

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Preparing your Manuscript

Authors can submit papers and articles in an acceptable file format: MS Word (doc, docx), LaTeX (.tex, .zip or .rar including all of your files), Adobe PDF (.pdf), rich text format (.rtf), simple text document (.txt), Open Document Text (.odt), and Apple Pages (.pages). Our professional layout editors will format the entire paper according to our official guidelines. This is one of the highlights of publishing with Global Journals—authors should not be concerned about the formatting of their paper. Global Journals accepts articles and manuscripts in every major language, be it Spanish, Chinese, Japanese, Portuguese, Russian, French, German, Dutch, Italian, Greek, or any other national language, but the title, subtitle, and abstract should be in English. This will facilitate indexing and the pre-peer review process.

The following is the official style and template developed for publication of a research paper. Authors are not required to follow this style during the submission of the paper. It is just for reference purposes.

Manuscript Style Instruction (Optional)

- Microsoft Word Document Setting Instructions.
- Font type of all text should be Swis721 Lt BT.
- Page size: 8.27" x 11'", left margin: 0.65, right margin: 0.65, bottom margin: 0.75.
- Paper title should be in one column of font size 24.
- Author name in font size of 11 in one column.
- Abstract: font size 9 with the word "Abstract" in bold italics.
- Main text: font size 10 with two justified columns.
- Two columns with equal column width of 3.38 and spacing of 0.2.
- First character must be three lines drop-capped.
- The paragraph before spacing of 1 pt and after of 0 pt.
- Line spacing of 1 pt.
- Large images must be in one column.
- The names of first main headings (Heading 1) must be in Roman font, capital letters, and font size of 10.
- The names of second main headings (Heading 2) must not include numbers and must be in italics with a font size of 10.

Structure and Format of Manuscript

The recommended size of an original research paper is under 15,000 words and review papers under 7,000 words. Research articles should be less than 10,000 words. Research papers are usually longer than review papers. Review papers are reports of significant research (typically less than 7,000 words, including tables, figures, and references)

A research paper must include:

a) A title which should be relevant to the theme of the paper.
b) A summary, known as an abstract (less than 150 words), containing the major results and conclusions.
c) Up to 10 keywords that precisely identify the paper's subject, purpose, and focus.
d) An introduction, giving fundamental background objectives.
e) Resources and techniques with sufficient complete experimental details (wherever possible by reference) to permit repetition, sources of information must be given, and numerical methods must be specified by reference.
f) Results which should be presented concisely by well-designed tables and figures.
g) Suitable statistical data should also be given.
h) All data must have been gathered with attention to numerical detail in the planning stage.

Design has been recognized to be essential to experiments for a considerable time, and the editor has decided that any paper that appears not to have adequate numerical treatments of the data will be returned unrefereed.

i) Discussion should cover implications and consequences and not just recapitulate the results; conclusions should also be summarized.
j) There should be brief acknowledgments.
k) There ought to be references in the conventional format. Global Journals recommends APA format.

Authors should carefully consider the preparation of papers to ensure that they communicate effectively. Papers are much more likely to be accepted if they are carefully designed and laid out, contain few or no errors, are summarizing, and follow instructions. They will also be published with much fewer delays than those that require much technical and editorial correction.

The Editorial Board reserves the right to make literary corrections and suggestions to improve brevity.

Format Structure

It is necessary that authors take care in submitting a manuscript that is written in simple language and adheres to published guidelines.

All manuscripts submitted to Global Journals should include:

Title

The title page must carry an informative title that reflects the content, a running title (less than 45 characters together with spaces), names of the authors and co-authors, and the place(s) where the work was carried out.

Author details

The full postal address of any related author(s) must be specified.

Abstract

The abstract is the foundation of the research paper. It should be clear and concise and must contain the objective of the paper and inferences drawn. It is advised to not include big mathematical equations or complicated jargon.

Many researchers searching for information online will use search engines such as Google, Yahoo or others. By optimizing your paper for search engines, you will amplify the chance of someone finding it. In turn, this will make it more likely to be viewed and cited in further works. Global Journals has compiled these guidelines to facilitate you to maximize the web-friendliness of the most public part of your paper.

Keywords

A major lynchpin of research work for the writing of research papers is the keyword search, which one will employ to find both library and internet resources. Up to eleven keywords or very brief phrases have to be given to help data retrieval, mining, and indexing.

One must be persistent and creative in using keywords. An effective keyword search requires a strategy: planning of a list of possible keywords and phrases to try.

Choice of the main keywords is the first tool of writing a research paper. Research paper writing is an art. Keyword search should be as strategic as possible.

One should start brainstorming lists of potential keywords before even beginning searching. Think about the most important concepts related to research work. Ask, “What words would a source have to include to be truly valuable in a research paper?” Then consider synonyms for the important words.

It may take the discovery of only one important paper to steer in the right keyword direction because, in most databases, the keywords under which a research paper is abstracted are listed with the paper.

Numerical Methods

Numerical methods used should be transparent and, where appropriate, supported by references.

Abbreviations

Authors must list all the abbreviations used in the paper at the end of the paper or in a separate table before using them.

Formulas and equations

Authors are advised to submit any mathematical equation using either MathJax, KaTeX, or LaTeX, or in a very high-quality image.

Tables, Figures, and Figure Legends

Tables: Tables should be cautiously designed, uncrowned, and include only essential data. Each must have an Arabic number, e.g., Table 4, a self-explanatory caption, and be on a separate sheet. Authors must submit tables in an editable format and not as images. References to these tables (if any) must be mentioned accurately.

Figures

Figures are supposed to be submitted as separate files. Always include a citation in the text for each figure using Arabic numbers, e.g., Fig. 4. Artwork must be submitted online in vector electronic form or by emailing it.

Preparation of Eletronic Figures for Publication

Although low-quality images are sufficient for review purposes, print publication requires high-quality images to prevent the final product being blurred or fuzzy. Submit (possibly by e-mail) EPS (line art) or TIFF (halftone/ photographs) files only. MS PowerPoint and Word Graphics are unsuitable for printed pictures. Avoid using pixel-oriented software. Scans (TIFF only) should have a resolution of at least 350 dpi (halftone) or 700 to 1100 dpi (line drawings). Please give the data for figures in black and white or submit a Color Work Agreement form. EPS files must be saved with fonts embedded (and with a TIFF preview, if possible).

For scanned images, the scanning resolution at final image size ought to be as follows to ensure good reproduction: line art: >650 dpi; halftones (including gel photographs): >350 dpi; figures containing both halftone and line images: >650 dpi.

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Tips for writing a good quality Social Science Research Paper

Techniques for writing a good quality homan social science research paper:

1. Choosing the topic: In most cases, the topic is selected by the interests of the author, but it can also be suggested by the guides. You can have several topics, and then judge which you are most comfortable with. This may be done by asking several questions of yourself, like "Will I be able to carry out a search in this area? Will I find all necessary resources to accomplish the search? Will I be able to find all information in this field area?" If the answer to this type of question is "yes," then you ought to choose that topic. In most cases, you may have to conduct surveys and visit several places. Also, you might have to do a lot of work to find all the rises and falls of the various data on that subject. Sometimes, detailed information plays a vital role, instead of short information. Evaluators are human: The first thing to remember is that evaluators are also human beings. They are not only meant for rejecting a paper. They are here to evaluate your paper. So present your best aspect.

2. Think like evaluators: If you are in confusion or getting demotivated because your paper may not be accepted by the evaluators, then think, and try to evaluate your paper like an evaluator. Try to understand what an evaluator wants in your research paper, and you will automatically have your answer. Make blueprints of paper: The outline is the plan or framework that will help you to arrange your thoughts. It will make your paper logical. But remember that all points of your outline must be related to the topic you have chosen.

3. Ask your guides: If you are having any difficulty with your research, then do not hesitate to share your difficulty with your guide (if you have one). They will surely help you out and resolve your doubts. If you can't clarify what exactly you require for your work, then ask your supervisor to help you with an alternative. He or she might also provide you with a list of essential readings.

4. Use of computer is recommended: As you are doing research in the field of homan social science then this point is quite obvious. Use right software: Always use good quality software packages. If you are not capable of judging good software, then you can lose the quality of your paper unknowingly. There are various programs available to help you which you can get through the internet.

5. Use the internet for help: An excellent start for your paper is using Google. It is a wondrous search engine, where you can have your doubts resolved. You may also read some answers for the frequent question of how to write your research paper or find a model research paper. You can download books from the internet. If you have all the required books, place importance on reading, selecting, and analyzing the specified information. Then sketch out your research paper. Use big pictures: You may use encyclopedias like Wikipedia to get pictures with the best resolution. At Global Journals, you should strictly follow here.



6. Bookmarks are useful: When you read any book or magazine, you generally use bookmarks, right? It is a good habit which helps to not lose your continuity. You should always use bookmarks while searching on the internet also, which will make your search easier.

7. Revise what you wrote: When you write anything, always read it, summarize it, and then finalize it.

8. Make every effort: Make every effort to mention what you are going to write in your paper. That means always have a good start. Try to mention everything in the introduction—what is the need for a particular research paper. Polish your work with good writing skills and always give an evaluator what he wants. Make backups: When you are going to do any important thing like making a research paper, you should always have backup copies of it either on your computer or on paper. This protects you from losing any portion of your important data.

9. Produce good diagrams of your own: Always try to include good charts or diagrams in your paper to improve quality. Using several unnecessary diagrams will degrade the quality of your paper by creating a hodgepodge. So always try to include diagrams which were made by you to improve the readability of your paper. Use of direct quotes: When you do research relevant to literature, history, or current affairs, then use of quotes becomes essential, but if the study is relevant to science, use of quotes is not preferable.

10. Use proper verb tense: Use proper verb tenses in your paper. Use past tense to present those events that have happened. Use present tense to indicate events that are going on. Use future tense to indicate events that will happen in the future. Use of wrong tenses will confuse the evaluator. Avoid sentences that are incomplete.

11. Pick a good study spot: Always try to pick a spot for your research which is quiet. Not every spot is good for studying.

12. Know what you know: Always try to know what you know by making objectives, otherwise you will be confused and unable to achieve your target.

13. Use good grammar: Always use good grammar and words that will have a positive impact on the evaluator; use of good vocabulary does not mean using tough words which the evaluator has to find in a dictionary. Do not fragment sentences. Eliminate one-word sentences. Do not ever use a big word when a smaller one would suffice.

Verbs have to be in agreement with their subjects. In a research paper, do not start sentences with conjunctions or finish them with prepositions. When writing formally, it is advisable to never split an infinitive because someone will (wrongly) complain. Avoid clichés like a disease. Always shun irritating alliteration. Use language which is simple and straightforward. Put together a neat summary.

14. Arrangement of information: Each section of the main body should start with an opening sentence, and there should be a changeover at the end of the section. Give only valid and powerful arguments for your topic. You may also maintain your arguments with records.

15. Never start at the last minute: Always allow enough time for research work. Leaving everything to the last minute will degrade your paper and spoil your work.

16. Multitasking in research is not good: Doing several things at the same time is a bad habit in the case of research activity. Research is an area where everything has a particular time slot. Divide your research work into parts, and do a particular part in a particular time slot.

17. Never copy others' work: Never copy others' work and give it your name because if the evaluator has seen it anywhere, you will be in trouble. Take proper rest and food: No matter how many hours you spend on your research activity, if you are not taking care of your health, then all your efforts will have been in vain. For quality research, take proper rest and food.

18. Go to seminars: Attend seminars if the topic is relevant to your research area. Utilize all your resources.
Refresh your mind after intervals: Try to give your mind a rest by listening to soft music or sleeping in intervals. This will also improve your memory. Acquire colleagues: Always try to acquire colleagues. No matter how sharp you are, if you acquire colleagues, they can give you ideas which will be helpful to your research.

19. Think technically: Always think technically. If anything happens, search for its reasons, benefits, and demerits. Think and then print: When you go to print your paper, check that tables are not split, headings are not detached from their descriptions, and page sequence is maintained.

20. Adding unnecessary information: Do not add unnecessary information like "I have used MS Excel to draw graphs." Irrelevant and inappropriate material is superfluous. Foreign terminology and phrases are not apropos. One should never take a broad view. Analogy is like feathers on a snake. Use words properly, regardless of how others use them. Remove quotations. Puns are for kids, not grunt readers. Never oversimplify: When adding material to your research paper, never go for oversimplification; this will definitely irritate the evaluator. Be specific. Never use rhythmic redundancies. Contractions shouldn't be used in a research paper. Comparisons are as terrible as clichés. Give up ampersands, abbreviations, and so on. Remove commas that are not necessary. Parenthetical words should be between brackets or commas. Understatement is always the best way to put forward earth-shaking thoughts. Give a detailed literary review.

21. Report concluded results: Use concluded results. From raw data, filter the results, and then conclude your studies based on measurements and observations taken. An appropriate number of decimal places should be used. Parenthetical remarks are prohibited here. Proofread carefully at the final stage. At the end, give an outline to your arguments. Spot perspectives of further study of the subject. Justify your conclusion at the bottom sufficiently, which will probably include examples.

22. Upon conclusion: Once you have concluded your research, the next most important step is to present your findings. Presentation is extremely important as it is the definite medium though which your research is going to be in print for the rest of the crowd. Care should be taken to categorize your thoughts well and present them in a logical and neat manner. A good quality research paper format is essential because it serves to highlight your research paper and bring to light all necessary aspects of your research.

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Informal Guidelines of Research Paper Writing

Key points to remember:

- Submit all work in its final form.
- Write your paper in the form which is presented in the guidelines using the template.
- Please note the criteria peer reviewers will use for grading the final paper.

Final points:

One purpose of organizing a research paper is to let people interpret your efforts selectively. The journal requires the following sections, submitted in the order listed, with each section starting on a new page:

The introduction: This will be compiled from reference matter and reflect the design processes or outline of basis that directed you to make a study. As you carry out the process of study, the method and process section will be constructed like that. The results segment will show related statistics in nearly sequential order and direct reviewers to similar intellectual paths throughout the data that you gathered to carry out your study.

The discussion section:

This will provide understanding of the data and projections as to the implications of the results. The use of good quality references throughout the paper will give the effort trustworthiness by representing an alertness to prior workings.

Writing a research paper is not an easy job, no matter how trouble-free the actual research or concept. Practice, excellent preparation, and controlled record-keeping are the only means to make straightforward progression.

General style:

Specific editorial column necessities for compliance of a manuscript will always take over from directions in these general guidelines.

To make a paper clear: Adhere to recommended page limits.



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- Separating a table, chart, or figure—confine each to a single page.
- Submitting a manuscript with pages out of sequence.
- In every section of your document, use standard writing style, including articles ("a" and "the").
- Keep paying attention to the topic of the paper.
- Use paragraphs to split each significant point (excluding the abstract).
- Align the primary line of each section.
- Present your points in sound order.
- Use present tense to report well-accepted matters.
- Use past tense to describe specific results.
- Do not use familiar wording; don't address the reviewer directly. Don't use slang or superlatives.
- Avoid use of extra pictures—include only those figures essential to presenting results.

Title page:

Choose a revealing title. It should be short and include the name(s) and address(es) of all authors. It should not have acronyms or abbreviations or exceed two printed lines.

Abstract: This summary should be two hundred words or less. It should clearly and briefly explain the key findings reported in the manuscript and must have precise statistics. It should not have acronyms or abbreviations. It should be logical in itself. Do not cite references at this point.

An abstract is a brief, distinct paragraph summary of finished work or work in development. In a minute or less, a reviewer can be taught the foundation behind the study, common approaches to the problem, relevant results, and significant conclusions or new questions.

Write your summary when your paper is completed because how can you write the summary of anything which is not yet written? Wealth of terminology is very essential in abstract. Use comprehensive sentences, and do not sacrifice readability for brevity; you can maintain it succinctly by phrasing sentences so that they provide more than a lone rationale. The author can at this moment go straight to shortening the outcome. Sum up the study with the subsequent elements in any summary. Try to limit the initial two items to no more than one line each.

Reason for writing the article—theory, overall issue, purpose.

- Fundamental goal.
- To-the-point depiction of the research.
- Consequences, including definite statistics—if the consequences are quantitative in nature, account for this; results of any numerical analysis should be reported. Significant conclusions or questions that emerge from the research.

Approach:

- Single section and succinct.
- An outline of the job done is always written in past tense.
- Concentrate on shortening results—limit background information to a verdict or two.
- Exact spelling, clarity of sentences and phrases, and appropriate reporting of quantities (proper units, important statistics) are just as significant in an abstract as they are anywhere else.

Introduction:

The introduction should "introduce" the manuscript. The reviewer should be presented with sufficient background information to be capable of comprehending and calculating the purpose of your study without having to refer to other works. The basis for the study should be offered. Give the most important references, but avoid making a comprehensive appraisal of the topic. Describe the problem visibly. If the problem is not acknowledged in a logical, reasonable way, the reviewer will give no attention to your results. Speak in common terms about techniques used to explain the problem, if needed, but do not present any particulars about the protocols here.

The following approach can create a valuable beginning:

- Explain the value (significance) of the study.
- Defend the model—why did you employ this particular system or method? What is its compensation? Remark upon its appropriateness from an abstract point of view as well as pointing out sensible reasons for using it.
- Present a justification. State your particular theory(-ies) or aim(s), and describe the logic that led you to choose them.
- Briefly explain the study's tentative purpose and how it meets the declared objectives.

Approach:

Use past tense except for when referring to recognized facts. After all, the manuscript will be submitted after the entire job is done. Sort out your thoughts; manufacture one key point for every section. If you make the four points listed above, you will need at least four paragraphs. Present surrounding information only when it is necessary to support a situation. The reviewer does not desire to read everything you know about a topic. Shape the theory specifically—do not take a broad view.

As always, give awareness to spelling, simplicity, and correctness of sentences and phrases.

Procedures (methods and materials):

This part is supposed to be the easiest to carve if you have good skills. A soundly written procedures segment allows a capable scientist to replicate your results. Present precise information about your supplies. The suppliers and clarity of reagents can be helpful bits of information. Present methods in sequential order, but linked methodologies can be grouped as a segment. Be concise when relating the protocols. Attempt to give the least amount of information that would permit another capable scientist to replicate your outcome, but be cautious that vital information is integrated. The use of subheadings is suggested and ought to be synchronized with the results section.

When a technique is used that has been well-described in another section, mention the specific item describing the way, but draw the basic principle while stating the situation. The purpose is to show all particular resources and broad procedures so that another person may use some or all of the methods in one more study or referee the scientific value of your work. It is not to be a step-by-step report of the whole thing you did, nor is a methods section a set of orders.

Materials:

Materials may be reported in part of a section or else they may be recognized along with your measures.

Methods:

- Report the method and not the particulars of each process that engaged the same methodology.
- Describe the method entirely.
- To be succinct, present methods under headings dedicated to specific dealings or groups of measures.
- Simplify—detail how procedures were completed, not how they were performed on a particular day.
- If well-known procedures were used, account for the procedure by name, possibly with a reference, and that's all.

Approach:

It is embarrassing to use vigorous voice when documenting methods without using first person, which would focus the reviewer's interest on the researcher rather than the job. As a result, when writing up the methods, most authors use third person passive voice.

Use standard style in this and every other part of the paper—avoid familiar lists, and use full sentences.

What to keep away from:

- Resources and methods are not a set of information.
- Skip all descriptive information and surroundings—save it for the argument.
- Leave out information that is immaterial to a third party.



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Results:

The principle of a results segment is to present and demonstrate your conclusion. Create this part as entirely objective details of the outcome, and save all understanding for the discussion.

The page length of this segment is set by the sum and types of data to be reported. Use statistics and tables, if suitable, to present consequences most efficiently.

You must clearly differentiate material which would usually be incorporated in a study editorial from any unprocessed data or additional appendix matter that would not be available. In fact, such matters should not be submitted at all except if requested by the instructor.

Content:

- Sum up your conclusions in text and demonstrate them, if suitable, with figures and tables.
- In the manuscript, explain each of your consequences, and point the reader to remarks that are most appropriate.
- Present a background, such as by describing the question that was addressed by creation of an exacting study.
- Explain results of control experiments and give remarks that are not accessible in a prescribed figure or table, if appropriate.
- Examine your data, then prepare the analyzed (transformed) data in the form of a figure (graph), table, or manuscript.

What to stay away from:

- Do not discuss or infer your outcome, report surrounding information, or try to explain anything.
- Do not include raw data or intermediate calculations in a research manuscript.
- Do not present similar data more than once.
- A manuscript should complement any figures or tables, not duplicate information.
- Never confuse figures with tables—there is a difference.

Approach:

As always, use past tense when you submit your results, and put the whole thing in a reasonable order.

Put figures and tables, appropriately numbered, in order at the end of the report.

If you desire, you may place your figures and tables properly within the text of your results section.

Figures and tables:

If you put figures and tables at the end of some details, make certain that they are visibly distinguished from any attached appendix materials, such as raw facts. Whatever the position, each table must be titled, numbered one after the other, and include a heading. All figures and tables must be divided from the text.

Discussion:

The discussion is expected to be the trickiest segment to write. A lot of papers submitted to the journal are discarded based on problems with the discussion. There is no rule for how long an argument should be.

Position your understanding of the outcome visibly to lead the reviewer through your conclusions, and then finish the paper with a summing up of the implications of the study. The purpose here is to offer an understanding of your results and support all of your conclusions, using facts from your research and generally accepted information, if suitable. The implication of results should be fully described.

Infer your data in the conversation in suitable depth. This means that when you clarify an observable fact, you must explain mechanisms that may account for the observation. If your results vary from your prospect, make clear why that may have happened. If your results agree, then explain the theory that the proof supported. It is never suitable to just state that the data approved the prospect, and let it drop at that. Make a decision as to whether each premise is supported or discarded or if you cannot make a conclusion with assurance. Do not just dismiss a study or part of a study as "uncertain."



Research papers are not acknowledged if the work is imperfect. Draw what conclusions you can based upon the results that you have, and take care of the study as a finished work.

- You may propose future guidelines, such as how an experiment might be personalized to accomplish a new idea.
- Give details of all of your remarks as much as possible, focusing on mechanisms.
- Make a decision as to whether the tentative design sufficiently addressed the theory and whether or not it was correctly restricted. Try to present substitute explanations if they are sensible alternatives.
- One piece of research will not counter an overall question, so maintain the large picture in mind. Where do you go next? The best studies unlock new avenues of study. What questions remain?
- Recommendations for detailed papers will offer supplementary suggestions.

Approach:

When you refer to information, differentiate data generated by your own studies from other available information. Present work done by specific persons (including you) in past tense.

Describe generally acknowledged facts and main beliefs in present tense.

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