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Discovering Thoughts, Inventing Future

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Organization Settings of Services Organizations: What is New Public Management Paradigm?

By Stefano de Nichilo
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Abstract- The objectives pursued by the New Public Management have not always been achieved and this has led to the shift of the focus of the reforms also towards dimensions more tied to the definition and management of the role and relations of the Services Organization both within the public system and with the subjects belonging to the private sector, be they companies, non-profit companies or citizens. In other words, we have moved from a New Public Management perspective to a Public Governance and Public Value perspective. In the face of these new conceptual perspectives, additional control tools have been adopted in the Services Organizations such as incentive systems, strategic control, performance management tools and management accounting. The proliferation of accounting and control tools and logics has led to the identification of a form of "accountingization" of public practices in a society where control has "exploded" in the reform process.

Keywords: accounting methodology, public governance, new public management, organizations settings, rituals of verification and services organizations.

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ORGANIZATIONSETTINGSOFSERVICESORGANIZATIONSWHATISNEWPUBLICMANAGEMENTPARADIGM

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Organization Settings of Services Organizations: What is New Public Management Paradigm?

Stefano de Nichilo

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I. Introduction Studies of Services Organization

In this paper, our conceptual stance is to analyze organizations as information use environments. This approach focuses on the user, the uses of information, and the contexts within which users make choices about what information is useful to them. These choices are based, "not only on subject matter, but on other elements of the context within which a user lives and works" (Hyndmanand Lapsley, 2016). The information use environment is defined as consisting of those elements that affect the flow and use of information messages into, within, and out of any definable entity; and determine the criteria by which the value of information messages will be judged. In an organization, the elements would comprise defined "sets of people" (e.g. professionals, managers) working on and resolving "problems" deemed to be important and typical, within contexts that include how the structure, style, culture, history and experience of the organization affect attitudes towards information and information behaviors of employees. For the purposes of this paper, we concentrate on information management policies and strategies; information behaviors and values; and information use outcomes.

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Information and knowledge management information management has been defined as the application of management principles to the acquisition, organization, control, dissemination, and use of information, and is ultimately concerned with the value, quality, and use of information to improve organizational performance. The information environment consists of six components: information strategy, information politics, information behavior and culture, information staff, information processes, and information architecture. Information strategy addresses the question of "What do we want to do with information in this organization?" It makes clear the intended link between information management and the ability of the organization to achieve its mission and goals (Kurunmaki, Lapsley and Melia, 2003). An organization's information strategy is often expressed in the form of a set of basic principles. Information politics arises from the distribution of the power that information bestows and the governance modes for its management and use. Five political models are identified, ranging from "feudalism", where business units define their own information needs and report limited information back to the firm, to "federalism", where there is consensus and negotiation among business units on the use of information. Three important types of information behaviors are concerned with: sharing information (making information available to others); handling information overload (making information engaging so that the right people recognize and use the right information); and dealing with multiple meanings (creating a common understanding of concepts and terms used in an organization). Information staff includes information content and information technology specialists who design, develop, train and coordinate the creation and use of information. Information processes describes how information work gets accomplished through determining information requirements, capturing information, distributing information, and using information (Malmi, Teemu, and Brown, 2008). Information architecture provides a guide to the structure and location of information within the organization. It can either be descriptive, such as a map of the current information environment, or prescriptive, as in presenting a model of the information environment. Recent research in the area of knowledge management suggests new ways of looking at information management. One perspective examines an

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organization as owning a stock of intellectual capital that it uses to create economic value. This intellectual capital includes the expertise and experience of individuals, the routines and processes that define the distinctive way of doing things inside the organization, as well as knowledge of customer needs and supplier strengths. Conceptually then, intellectual capital consists of human capital and structural capital, where human capital is derived from the competence, skills and experience of employees, and structural capital comes from the procedures, routines, and relationships the organization has developed over time. From an information perspective, developing structural capital requires policies and processes to be designed that allow the firm to be efficient in creating, storing, accessing, and using information. Developing human capital includes improving information skills and providing information that enables knowledgeable employees to find each other and to share their expertise. Another perspective in knowledge management contrasts the differences between tacit and explicit knowledge. This perspective found two different knowledge management strategies in place: one based on codification, and the other on personalization. The codification strategy focuses on the reuse of explicit knowledge. Knowledge is codified, stored and disseminated through the use of information technology, electronic document systems, and formal procedures. The personalization strategy focuses on the sharing of tacit knowledge. Knowledge is shared through person-to-person interaction that takes place in mentoring, conversations, and social networks. As part of the theoretical framework of the present study, we focus on the information management activities that support both strategies, as well as considering the elements that make up the broader information environment of the organization.

Information culture is reflected in the organization's values, norms, and practices with regard to the management and use of information. Values are deeply held beliefs about the goals and identity of the organization, and how it should go about attaining those goals. These values are often hard to articulate and even harder to change. They provide the answers to questions such as "What does the organization perceive to be the role and contribution of information to organizational effectiveness?" and "What values underlie the organizational style of managing its creation and use of information?" (Modell, Sven, 2004, 2009). Norms are derived from values, but have a more direct influence on information behaviors. Norms are rules or socially accepted standards that define what is normal or to be expected in the organization. Norms or rules may be informal or formal. Informal norms and attitudes influence the creation, flow, and use of information in individuals and groups. Formal rules, routines and policies may exist to plan, guide, and control information as an organizational asset. Behaviors are repeated patterns of action that involve organizational roles, structures, and forms of interactions. They describe how people find, organize, use and share information as part of their normal work patterns. Certain organizational practices or policies may act as impediments (or incentives) to the effective use of information. Aspects of interest are those things which serve to legitimize and justify values, which embody social existence. Although her analysis is framed in terms of the specific social worlds of her study participants, her arguments are generalizable to the social worlds that are constituted by organizational units. Social norms create standards to judge "rightness or wrongness" in social appearances. Norms give people a way to gauge what is "normal" in a specific context and at a specific time – they point the way to acceptable standards and codes of behavior (Moore, 2014). Worldview is a collective perception by members of a social world regarding those things which are deemed important and unimportant. Worldview provides a collective approach to assess the importance of information. Social types are "the absolute definitions given to members of a social world". They classify persons and in doing so let members of a small world have sensible clues to the ways in which to behave, converse, and share information. The three information capabilities are:

- Information technology practices: the capability to effectively manage IT applications and infrastructure to support operations, business processes, innovation and managerial decision making.
- Information management practices: the capability to manage information effectively over the life cycle of information use, including sensing, collecting, organizing, processing and maintaining information.
- Information behaviors and values: the capability to instill and promote behaviors and values in people for effective use of information.

Information integrity is defined as the use of information in a trustful and principled manner at the individual and organizational level. It defines the boundaries beyond which managers and people may not go in a company. It implies that there are ways of using information that are not appropriate and will be sanctioned. Information formality is the willingness to use and trust institutionalized information over informal sources. Information control is the extent to which information about performance is continuously presented to people to manage and monitor their performance. Managers use information to monitor and control operational activities and decisions to achieve intended strategy and improve business performance. Information transparency Working with information is defined as openness in reporting and presentation of information on errors, failures, and mistakes. It permits organizational members to learn from failures, errors, and mistakes. Information sharing is the willingness to provide others with information in an appropriate and collaborative fashion. Proactiveness is the active concern to think about how to obtain and apply new information in order to respond quickly to business changes, and to promote innovation in products and services.

Information behavior may be defined as the sum of activities through which information becomes useful. The usefulness or value of information is based not only on subject matter or how well the information content matches a query or topic, but also on the requirements, norms and expectations that arise from the user's work and organizational contexts. Information use occurs when the individual selects and processes information which leads to a change in the individual's capacity to make sense or to take action. The information that is eventually used is a very small subset of the total information that is encountered (Mussari, 2001). The outcome of information use is a change in the individual's state of knowledge or capacity to act. Thus, information use typically involves the selection and processing of information in order to answer a question, solve a problem, make a decision, negotiate a position, or make sense of a situation.

II. Organization Settings and Background

During the initial spur of the global financial crisis, some accounting scholars debated the extent to which accounting and auditing practices were implicated in fostering or causing the financial meltdown and also how the profession had responded to the crisis. In particular, the accounting profession has been criticized for failing to anticipate the crises of banks and financial institutions, with questions raised regarding the claimed silence of auditors (Alford, 2009) and analyses conducted of the way in which the profession, globally, responded to the crisis (Hughes,2003). Considerable attention has been devoted by accounting scholars to the role and significance of "fair value accounting" in the global financial crisis, particularly regarding its claimed, damaging, pro-cyclical effects (Grabner and Moers, 2013). Concerns about the financialization of accounting as a discipline and practice (Bruns,2014) has seen accounting described as an integral part of the "symbolic universe of neo-liberalism" (Borgonovi, 2005). With the latter ideology said to be centrally implicated in the establishment of a financialized economy from which the global financial crises emerged in 2008 (Argento, Culasso, and Truant 2019). Questions have also been asked of the extent to which accounting practices and accounting firms have contributed to increasingly inequitable distributions of income and wealth – with some critics stressing that accounting is far from being a neutral practice, but has been molded in order to represent dominant class interests (Cepiku,2005). Alternatively, others have sought to question the impact of accounting practices on the macroeconomic modeling and associated interventions of policy makers and regulators (Bozeman, 2007). However, despite explicit calls for accounting studies to explore the social and organizational dynamics of the global financial crises and the role of accounting and Public sector accounting, accountability. This may be a reflection of the scant attention typically devoted to public services and organizations in accounting journals (Anessi-Pessina and Steccolini 2007). However, it is still quite surprising, when it is evident that accounting has historically been closely interlinked with changing economic and social conditions (Hood 1991). Indeed, they observed that societies historically have flourished when harnessing accounting as part of their general cultures but that they can also frequently lose the capacity to master the interplay between accounting and cultural life and find themselves in unexpected, avoidable and sometimes cataclysmic financial crises. The solution is simple: more surveillance and discipline (of 'peripheral states' by 'central' institutions), less public spending (austerity measures), and 'structural reforms' – that is, increased neoliberalism" (Borgonovi, Elio and Riccardo Mussari, 2011). "We do not argue that critique and resistance are impossible, but that their effects are less and less to trigger radical change and more and more to foster an illusion of debate without disrupting the neoliberal state privatization agenda too much" (Bracci, Humphrey, Moll and Ileana Steccolini 2015). Of perhaps even more surprise, is the sheer absence of studies of the role of, and implications for, management accounting practices under an era of austerity. Their focus collectively centers on changing patterns of accountability under austerity, and how accounting is implicated in processes of advancing, absorbing or combating austerity at different levels and across different types of relationships, whether organizational, social and/or political. They find that austerity brought about a stronger reliance on constraining elements of management control systems, which may ensure stronger financial stability in the short term. However, tightening of these systems is also reported to have longer term implications for employee motivation and served to promote increased opportunistic behavior within departments, forms of resistance, reducing the overall effectiveness of control. Such effects were capable of being curbed when facilitating elements of controls were also emphasized, with departmental responses to austerity being enhanced through the use of a blend of management controls. This strategy was considered a way of addressing multiple stakeholder expectations when cutbacks and increasing reliance on centrally imposed financial goals threatened the decisional room left to the authority. In the process, accountability relationships were reconfigured in ways that saw grassroots groups being enrolled, via new budgetary emphases, in different ways of working, becoming policy proposers with local government acting as assessors and arbiters of competing funding proposals. Power (2010) framework provide insight into the roles played by two distinct forms of accounting: government financial reporting and statistical accounting. This study describe how accounting also has an adjudicating role by helping to frame which techniques will be used to define success and failure in terms of economic recovery. Finally, they identify how accounting has a subjectivizing role since it promotes structured responses to decision making. These papers collectively provide a useful step forward in developing understanding of the significance and contribution of public sector accounting in this new era of austerity. They also invite greater consideration of the way in which public sector accounting research needs to develop, and it is to such matters that the closing section of this editorial is devoted.

III. Leadership in Public Sector Crisis

Leadership is commonly seen as an important variable affecting organizational performance in public sector crises. While the concept has been extensively studied, there is still much to be discovered regarding how leadership affects variables such as organizational culture, climate, and performance in particular the role of services organizations in managing financial and real estate portfolio in the Italian public sector as a response to preventive crisis in institutions. Most of the research on leadership has been in for-profit organizations as services organizations. While research on leadership in human services organizations is increasing, there is still a limited amount of research knowledge to guide practice in our field. One seminal article in social work Patti (1987) described the importance of administrative "behaviors, attitudes, practices, and strategies" in ensuring effective service outcomes, and subsequent research, some of which is included below, supports this perspective. The purpose of this paper is to provide guidance to human services managers, consultants, and researchers regarding the ways in which leadership can improve the performance of human services organizations. The paper will begin with definitions and a conceptual overview and a brief discussion of evidence-based practice applications in management, which will undergird the rest of the work. Then we will review the best-known and most studied theories and models of leadership, with specific attention to how leadership impacts organizational culture, climate, and performance in change management in Italian public sector to preventive crisis in institutions. Organizational change leadership and, specifically, organizational cultural change will receive special attention because of their key roles in impacting and improving organizational performance.

IV. Methodology

a) Data Sampling

In this study the sample is composed by 35 Services Organizations belonging to 20 groups of listed Italian companies (industrial and financial) as at 31.12.2013(50% under private control and 50% under public control).

The sample consists of the following survey dimensions:

a. the revenues of the service organizations exceed 40 million euros.
b. 10% of the services organization in Italy was investigated.

The companies websites have continuous evolution, so the data collection was done in shortest time possible, from September to December of 2013.

b) Research Design

The dependent variable is directly observed by visiting and explores the corporate website.
The characteristics of services organizations disclosure is classified in two categories:

– Group company number (Nc).
– Number of controlling interests (Ni).

This aspect determine the "Institutional mode of action" of services organizations in Italy. The concept of social disclosure means providing adequate information about the events of the organization and its activities for the users of that information in order to enable them to make and take the decision.

$$\text{“V Model”} = v = \frac{\mathrm{Nc}}{Ni}$$

Tab. 1: Corporate Disclosure of Services Organizations.

Examined Disclosure	Dependent variable	Value at 31.12.2014
Group company number and Number of controlling interests.	V	Data Corporate Governance Report

Tab. 2: Framework and Hypothesis Independent Variable

A_1	There is a positive association between company the ownership structure and the "Institutional mode of action" of services organizations.
A_2	There is a positive association between the impact of equity investments on total asset and the "Institutional mode of action" of services organizations.
A_3	There is a positive association between corporate governance activism and the "Institutional mode of action" of services organizations.
A_4	There is a negative association between the absenteeism rate and the "Institutional mode of action" of services organizations.
A_5	There is a positive association between the incidence of real estate on total asset and the "Institutional mode of action" of services organizations.
A_6	There is a negative association between the services provided and the "Institutional mode of action" of services organizations.
A_7	There is a positive association between the legal nature of the parent company and the "Institutional mode of action" of services organizations.
A_8	There is a negative association between number of employees on labor costs (force of labor) and the "Institutional mode of action" of services organizations.

Tab. 3: Descriptive Statistics Independent Variable

Variable	Mean	Std. dev	Min	Max
Ownership	0,75	0,31	0,09	1
Equity Investments	0,53	0,49	0,1	89,21
Corporate Governance Activism	2,15	2,5	0,11	15,22
Absenteeism Rate	8,11%	2,75%	-1,14%	15,01%
Incidence of real estate	0,04	0,12	0,01	0,15
Services provided	1,95	0,35	0	3
Legal nature	0,57	0,11	0	1
Force of Labor	0,05	0,55	0,01	0,11

Tab. 4: Dependent Variable

B_1	There is a positive association Group company number (Nc) and "Institutional mode of action" of the services organizations.	The Group company number varies from 10 units to 55 units for 2013.
B_2	There is a negative association between Number of controlling interests (Ni) and "Institutional mode of action" of the services organizations.	The Number of controlling interests varies 1 to more than 12 in 2013.

Tab. 5: Descriptive Statistics of Depend Variable

Examined statistics	Group company number	Number of controlling interests
Median	33,22	5,55
Mean	38,55	7,25
Variance	5,88	4,95

To tested the hypotheses we used the research model specified in the follow equation:

$$v_{(1)} = \beta_0 + \beta_1 (OWN) + \beta_2 (EI) + \beta_3 (CGA) + \beta_4 (AR) + \beta_5 (RE) + \beta_6 (SP) + \beta_7 (LN) + \beta_8 (FL) + \xi$$

Tab. 6: Research Model

Symbols	Description	Value al 31.12.2013
β0	Intercept	
OWN	The ownership structures is the most common determinant to explain the "Institutional mode of action" of the services organizations.	[0;1]
EI	The equity investments on total asset is one of significant determinants of services organizations.	Financial Portfolio assenting's
CGA	Corporate Governance Activism is reported as professionality index.	$\frac{Corporate\ Governance\ Actors}{Number\ Executive\ Board}$
AR	The absenteeism rate it is the most important variable in services organizations	[0;1]
RE	The real investments on total asset is one of significant determinants of services organizations.	Real Portfolio assenting's
SP	The services provided are: 0 in-house 1 market-oriented 2 in-house and market-oriented 3 export services	[0;3]
LN	The legal nature variable of the parent company: 0 public entity 1 private entity	[0;1]
FL	There force of labor is terminal variable and represents institutional parameter.	$\frac{Number\ of\ employees}{Labor\ cost}$
E	Residual	

V. Results

This study analyses the characteristic and the determinants of the "Institutional mode of action" of the services organizations in Italian industrial and financial companies at 31.12.2013.

The multivariate analyses shows a positive significant related, to the companies have high profitability, the equity investments on total asset and the incidence of real estate on total asset have high the "Institutional mode of action" of the services organizations. The companies with high corporate governance activism and ownership structure, have high "Institutional mode of action" of services organizations while absenteeism rate and force of labor we found a negative significant association.

The model is significant (p-value 0.01 level), the adjusted R^2 are 0.45 and F-value 3.50.

The independent variable has significant result (0,01 level) is the equity investments on total asset(A_2) and the incidence of real estate on total asset (A_5).

Tab. 6: Multivariate Analyses

Regress Model	Coefficient	T value
Intercept	-1,25	-5,25***
OWN	0,5	1,11
EI	1,8	2,25***
CGA	0,11	1,55**
AR	-2,2	-1,55
RE	2,5	2,77***
SP	-0,05	1,99
LN	0,01	-1,22
FL	-3,1	-2,81
Adjusted R^2	0,45	
F Value	3,50	

* ** *** *p-value at 0.10 0.05 and 0.01.*

VI. Overall Conclusion

Everything reiterated raises questions about how it is interpreted by financial responsibility and whether it depends on the quality of the audit reports or on the forums in which they are delivered and connected, discussed. This paper analyzes the factors that explain the greater use of special reports by the Organization Services, such as modeling methodology, wondering if they resemble evaluation studies. It examines their training as well as their impact as well as the institutional use implicit in the performance audit.

What factors and circumstances explain the increased use of special reports? The work demonstrates how the interpretation of the Organization Services has political implications and serves to promote its institutional interests in the battlefield to define "responsibility" and in what concerns it.

From an anthropological perspective, the audit could traditionally be considered as "Rituals of Verifications", recognizing that "the procedure and the evaluation have social problems in public management. However, the needs for adequate protection with respect to thought verification. In addition, the audit may often seem "banal, inevitable part of a bureaucratic process", but taken together and over time, they are probably part of a distinct cultural artefact.

Like the audit, the performance assessment function is to allow for accountability, but there is also an emphasis on collective learning. However, securing both can "run into several complications when applied in complex multi-actor political processes."

For the executive, its main purposes are: defined in the planning of interventions, including input inputs to establish political priorities; assist in the efficient allocation of resources; improve the quality of the intervention; and report on the results of the intervention. This presupposes feedback in the political cycle, although theory does not always rely on practice.

The audit is therefore an essential part of the assessment, contributing to the realization of financial responsibility, but also, provided the institutional legitimacy of the decision-making system. In short, audit and evaluation are both key elements in the process of democratic accountability, but the question of what is accounted for and who is taken into account is central to the debate.

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Sector Promotion in Mexico and the Role of China in Supply Chains

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Abstract- In this quantitative study, a distributed lag model with dichotomous variable in its interactive form is applied and its results prove that the link between Chinese imports and Mexican exports to the United States made by Mexico has remained unchanged from 2001 to 2021, in addition to having a magnitude higher than that registered during the first 7 years of the application of NAFTA. At the same time, the statistical figures confirm that the participation of the added value of exports in total manufacturing production has sustained constant growth. Given recent events such as the trade frictions between the world's two largest economies, the emergence of several mega regional trade agreements, such as CPTPP, RECP and the renewal of NAFTA, etc., the potential reconfiguration of global value chains and supply could become a major challenge for the sustained development of production plants and the Mexican economy.

Keywords: supply chains, trade flows, trade frictions.

GJHSS-E Classification: JEL Code: F13, F15, C13, C51

SECTORPROMOTIONINMEXICOANDTHEROLEOFCHINAINSUPPLYCHAINS

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Sector Promotion in Mexico and the Role of China in Supply Chains

Desarrollo de las Cadenas del Valor en México y el Papel del Suministro de China

Xuedong Liu [α] & Gerardo Covarrubias López [σ]

Resumen- En este estudio cuantitativo, se aplica un modelo de rezagos distribuidos con variable dicótoma en su forma interactiva cuyos resultados comprueban que la vinculación entre las importaciones chinas realizadas por México y las exportaciones mexicanas hacia Estados Unidos se ha mantenido sin cambio desde 2001 a 2021, además de tener una magnitud superior a la registrada durante los primeros 7 años de la aplicación del TLCAN. Por su parte, las cifras estadísticas constatan que la participación del valor agregado de las exportaciones en la producción de manufactura total ha sostenido un crecimiento constante en el mismo lapso. Ante acontecimientos recientes tales como las fricciones comerciales entre las dos economías más importantes del mundo, el surgimiento de varios mega acuerdos comerciales regionales, tales como CPTPP, RECP y TLCAN renovado o TMEC, etc., la potencial reconfiguración de las cadenas globales de valor y del suministro podría convertirse un reto importante para el desarrollo sostenido de las plantas productivas y la economía mexicana.

Palabras clave: cadenas de suministro, flujos comerciales, fricciones comerciales.

Abstract- In this quantitative study, a distributed lag model with dichotomous variable in its interactive form is applied and its results prove that the link between Chinese imports and Mexican exports to the United States made by Mexico has remained unchanged from 2001 to 2021, in addition to having a magnitude higher than that registered during the first 7 years of the application of NAFTA. At the same time, the statistical figures confirm that the participation of the added value of exports in total manufacturing production has sustained constant growth. Given recent events such as the trade frictions between the world's two largest economies, the emergence of several mega regional trade agreements, such as CPTPP, RECP and the renewal of NAFTA, etc., the potential reconfiguration of global value chains and supply could become a major challenge for the sustained development of production plants and the Mexican economy.

Keywords: supply chains, trade flows, trade frictions.

I. Introducción

En 1994, cuando se puso en práctica el Tratado del Libre Comercio de América del Norte (TLCAN), México había entrado en una nueva etapa del crecimiento económico con mayor dinámica que fue impulsado principalmente por las exportaciones y la inversión extranjera directa (IED), ambas derivadas de las ventajas competitivas proporcionadas por el acuerdo suscrito.

Sin embargo, al iniciar el nuevo milenio, ante varios sucesos acontecidos a nivel mundial, tales como el ingreso de China a la Organización Mundial del Comercio (OMC), la firma del libre comercio de Estados Unidos con otros países del mundo, particularmente con los de región de Centroamérica y del Caribe, entre otros, propiciaron la pérdida relativa de las ventajas competitivas para las exportaciones mexicanas hacia los Estados Unidos. De tal manera, los flujos comerciales entre los dos países de la zona de libre comercio empezaron a arrojar una tendencia decreciente, e incluso en algunos años con cifras negativas, pues por primera vez después de la aplicación de TLCAN, las exportaciones mexicanas registraron una contracción con -4.6% en 2001 en comparación con el nivel observado en 2000 (Gráfica 1).

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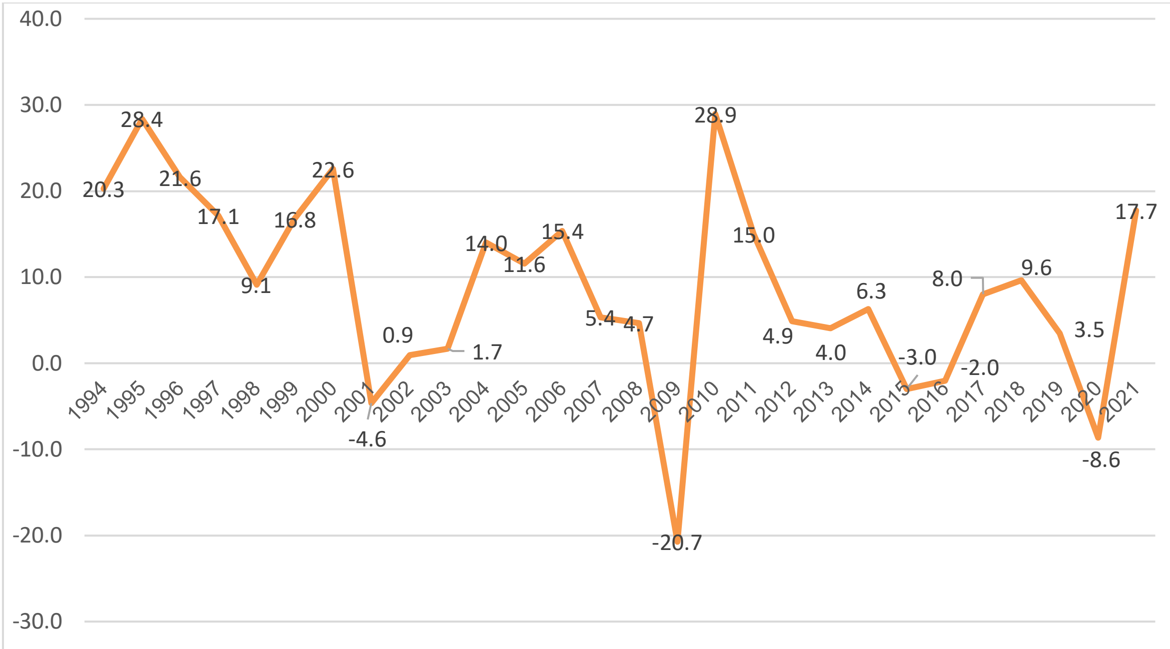


Fuente: Elaboración propia con datos de la Secretaría de Economía.

Gráfica 1: Variación Porcentual Anual de las Exportaciones Mexicanas Hacia el Mercado Norteamericano, 1994-2021.

En su momento y con el propósito de revertir esta tendencia, o al menos aliviar parcialmente los impactos generados por los acontecimientos sobre las exportaciones mexicanas y el crecimiento económico, el gobierno mexicano, a través de la Secretaría de Economía (SE) inició el diseño y la instrumentación de los distintos Programas de Promoción Sectorial (Prosec) (SE, 2002) y otras medidas pertinentes, todas con propósito de consolidar y fortalecer el desarrollo de las cadenas de valor y del suministro, particularmente las destinadas a las exportaciones.

Al mismo tiempo, justamente por este ajuste y otros sucesos, los flujos comerciales bilaterales entre las China y México han tomado cada vez mayor fuerza que antes, pues en el periodo 1994-2000, el saldo total que incluye tanto las importaciones como las exportaciones representaba solamente el 0.6% del comercio exterior de México; sin embargo, en 2021 la participación ascendió a 11.0%, de tal manera, el país asiático ha consolidado como el segundo socio comercial, posición lograda a partir de 2003.

Cabe mencionar que la creciente importancia de los intercambios comerciales sostenidos entre China y México se debe básicamente al ascenso de las importaciones procedentes del país asiático que subió su peso desde 0.6% en 1994 a 20.0% en 2021. En contraste, la participación de los bienes importados procedentes de Estados Unidos bajó desde 69.3% en 1994 a 43.7% en 2021, con una disminución neta de 25.6 puntos porcentuales. Mientras tanto, las exportaciones mexicanas hacia su vecino del norte registraron una caída de 4.1 puntos porcentuales durante los dos lapsos y, la cifra correspondiente a China fue de 1.8 puntos porcentuales, pero en sentido opuesto con respecto a las observadas por Estados Unidos (Cuadro 1).

Cuadro 1: Variación Porcentual de las Importaciones y Exportaciones de México con China y Estados Unidos 2019-2020

	Importaciones mexicanas (%)		*Exportaciones mexicanas (%)*	
	De China	*De Estados Unidos*	*A China*	*A Estados Unidos*
1994	0.6	69.3	0.1	84.8
2021	20.0	43.7	1.9	80.7
Variación porcentual	19.4	-25.6	1.8	-4.1

Fuente: Elaboración propia con datos de la Secretaría de Economía.

Este trabajo se concentra en el análisis de los ajustes registrados del comercio exterior que México ha realizado en el lapso de 1994-2021 desde dos enfoques interrelacionados. Por un lado, antes de 2000, el crecimiento acelerado de las exportaciones mexicanas hacia el mercado de Estados Unidos no generó cambios importantes en el contenido nacional de acuerdo con el valor agregado; sin embargo, durante casi los primeros10 años de este nuevo siglo se observó un leve decremento, sobre todo para los sectores recién introducidos a México, tales como los relacionados con las altas tecnologías modernas de informática y de comunicación.

Por ello, la hipótesis principal de este estudio es que las crecientes importaciones procedentes de China después de 2001 a la fecha implicarían un impulso adicional a las exportaciones mexicanas hacia Estados Unidos y al mismo tiempo se encontrarían desligadas con la variación del contenido nacional en las mismas exportaciones.

El ensayo se estructura por cuatro partes, además de la introducción. En la primera sección es una descripción del comercio trilateral entre China, México y Estados Unidos y las discusiones relacionadas con el tema. En seguida, se analizarán los ajustes del contenido nacional en las exportaciones mexicanas de acuerdo con el valor agregado por sector industrial. En la tercera sesión se presentará una estimación cuantitativa a través de un modelo de rezagos distribuidos con variable dicótoma en su forma interactiva para demostrar que los vínculos entre las exportaciones mexicanas y las importaciones procedentes de China se han fortalecido a partir de 2001 cuando China ingresó a la OMC. Y finalmente son las conclusiones.

II. Debates Relacionados con el Comercio Trilateral Entre China, México y Estados Unidos Ante la Aplicación del TLCAN

Los ajustes registrados tanto en la participación del contenido nacional en las exportaciones mexicanas como en la sustitución de los productos importados desde Estados Unidos por los originarios de China han propiciado discusiones importantes, ya que los pros y contras de ellos no han sido fácil de ser conciliados, ante los ajustes en la aplicación del TLCAN que han registrados dos fases claramente distintas.

En la primera (1994-2000) la región se integró en forma profunda, a raíz del comercio, las inversiones y las reglas de origen en segmentos específicos de cadenas industriales. Se puede observar que el acuerdo comercial suscrito por los tres países de la zona de América del Norte evolucionó conforme a las previsiones y estimaciones efectuadas; particularmente, la región creció en términos del producción, comercio, inversión, empleo y salarios, entre otras variables, además de que el comercio intrarregional también presentó un aumento en forma considerable (Dussel y Gallagher 2014; Gutiérrez 2014; De la Cruz y Veintimilla 2014; López, *et al*., 2014; Espinosa y Serra Puche 2005).

En términos generales, el convenio comercial significó un gran paso hacia adelante con resultados positivos para la economía mexicana al cumplir los pronósticos teóricos en materia del crecimiento económico por medio del efecto *Catching-up*[1] al cerrar algunas brechas entre las economías involucradas, sobre todo para el caso de México con respecto a Estados Unidos y Canadá.

Sin embargo, considerando la complejidad y la polarización en la estructura territorial y socioeconómica que México ha formado a lo largo de su historia y que aún prevalece todavía hasta la fecha, la integración de varios segmentos de la industria mexicana con los otros dos integrantes en el TLCAN no fue suficiente en la primera fase. Por ello, el crecimiento acelerado tanto de las exportaciones como de la economía no generó efectos homogéneos para todos los sectores productivos ni para todos los segmentos de la población y de la sociedad, debido al avance limitado en el desarrollo de los encadenamientos hacia delante y hacia atrás.

Cuando el TLACAN empezó la segunda etapa (a partir de 2000), en los ámbitos de comercio, inversión e integración nacional y regional, entre otras variables, “aparentemente tanto México como Estados Unidos están perdiendo terreno ante terceros países como China” (Dussel y Gallagher, *op. cit.*) que se convirtió en un “huésped no invitado” del acuerdo comercial en la zona norteamericana.

Al mismo tiempo, de los análisis anteriores, se puede observar que los ajustes de las importaciones mexicanas de productos procedentes de China y de Estados Unidos que marchan en sentidos opuestos, sobre todo después de 2001, lo cual en gran medida implicarían una sustitución entre las dos economías para suministrar a las cadenas productivas mexicanas, sobre todo de aquellas en las cuales sus productos finales son destinados a abastecer al mercado norteamericano. De acuerdo con un estudio realizado por Dussel y Gallagher (op. cit.), se reconoce que la pérdida de participación estadounidense en el mercado mexicano en favor de China se debe a que, para las empresas orientadas a las exportaciones que operan en México, los productos procedentes del país asiático representan insumos más baratos. Por ello, presumiblemente, el desplazamiento de los bienes provenientes de Estados Unidos por los de China significa un impulso adicional a las exportaciones mexicanas hacia el mercado de su vecino del norte. En otras palabras, existe una relación positiva entre las

[1] De acuerdo con los modelos neoclásicos de crecimiento exógeno que se fundamenta básicamente en el modelo de Solow (1956), el ingreso per cápita entre los países en desarrollo y los desarrollados tendría un comportamiento convergente debido a la hipótesis de la existencia de rendimientos decrecientes a la escala por inversión. Por lo que se refiere al progreso técnico, estos modelos lo consideran exógeno, a pesar de que inicialmente este factor no estaba explícitamente incluido, se concluía que desempeñaba un papel significativo en el crecimiento.

importaciones realizadas por México procedentes del país asiático y las exportaciones de productos mexicanos destinados al mercado estadounidense, especialmente después de 2001, cuando el TLCAN empezó a perder parcialmente las ventajas competitivas para la mayor integración regional de las cadenas productivas por diversas razones.

Para comprobar lo anterior, una opción sería calcular el coeficiente de correlación entre las importaciones que realizan México con China y las exportaciones mexicanas destinadas a los Estados Unidos. De acuerdo con las cifras publicadas por la SE, entre estas dos variables, el indicador mencionado entre los flujos comerciales es de 0.9686 durante el lapso de 1994-2019; sin embargo, si se analiza la información por periodos diferentes dentro de los 24 años, concretamente, de 1994-2000 y 2001-2019 respetivamente, se revela que, en la segunda fase, el valor del coeficiente de correlación es mayor que el calculado en la primera, de 0.9865 y 0.9739 en cada caso.

En este sentido, se puede señalar que los socios comerciales de México aprovecharon mejor los instrumentos gubernamentales de promoción sectorial y otras circunstancias mencionada en párrafos anteriores, independientemente de los países con los que se ha firmado algún acuerdo del libre comercio, como es el caso de China. En este caso particular, México ha sido “el trampolín y lugar de ensamblaje para colocar sus productos en el mercado norteamericano, al proveer los insumos intermedios que son utilizados tanto para la producción orientada al mercado doméstico, como al de exportación” (Gutiérrez, op. cit:31). Por ello, esta dinámica reduce el valor agregado regional y desintegra las cadenas productivas de la zona norteamericana; motivo por el cual, el 50% de las exportaciones están basadas en un proceso maquilador básico, fundamentalmente de ensamble. Evidentemente, esto va en contra de la integración productiva y de valor agregado que se buscaba obtener con el TLCAN.

Sin embargo, lo anterior no se debe considerar como una sorpresa, ya que las inversiones tanto nacionales como extranjeras buscan los nichos de mercado y las oportunidades que ofrezcan las mejores ventajas competitivas y de ganancias, por ejemplo, incentivos fiscales, costos laborales competitivos, mayor productividad, baja volatilidad en el entorno económico y financiero, así como mayores y eficientes vías de comunicación. En este contexto, México vivió una creciente expansión comercial hacia Estados Unidos gracias a las ventajas logradas a través del TLCAN, la situación geográfica y los reducidos costos laborales. No obstante, lo que sucedió en la primera fase ya no es comparable con lo que prevaleció en la segunda por las modificaciones en favor a otras economías, principalmente de China. (De la Cruz y Veintimilla, *op. cit.*)

Es importante señalar que el papel que México ha desempeñado como “el trampolín y lugar de ensamblaje” para colocar sus productos en el mercado norteamericano, fue posible gracias a las distintas modalidades de los flujos comerciales que ha sostenido Estados Unidos con China y México. Para el caso de México, el comercio intraindustrial representa una especialización cada vez mayor tanto de forma vertical (la transferencia de un producto de un país a otro en varias etapas de su desarrollo o comercio intrafirma) como en forma horizontal (intercambio de productos similares pero diferenciados), mientras en los intercambios comerciales entre las dos economías más importantes del mundo se concentran principalmente en la modalidad horizontal (López, *et al*., op. cit.).

A través de los análisis anteriores, se podría concluir que, al entrar a la segunda fase de operación del TLCAN (a partir de 2001) las exportaciones hechas por México hacia el mercado norteamericano registraron aparentemente dos dinámicas distintas en comparación con las arrojadas durante los primeros años de puesta en práctica del mismo acuerdo comercial. En primer lugar, la tasa de crecimiento de los envíos mexicanos al mercado de su vecino del norte ya no podido seguir la misma fuerza que en la primera a pesar de sostener un comportamiento positivo. En segundo lugar, para satisfacer las crecientes necesidades generadas por los estadounidenses y ganar la competitividad sobre todo, las plantas productivas, incluyendo las ya existentes y las recién creadas durante este proceso de operación del TLCAN, se encuentran obligados vincularse con los eslabonamientos de suministro que incluyen los insumos, componentes y bienes intermedios procedentes de importación, especialmente de China.

III. Ajustes del Contenido Nacional en las Exportaciones Mexicanas, 2003-2020

La descripción anterior sobre la evolución del TLCAN y sus implicaciones en torno al desarrollo de las plantas productivas mexicanas, especialmente las dedicadas a las exportaciones, evidenció que tanto China como México son proveedores importantes para el mercado norteamericano. Sin embargo, existe una diferencia marcada entre estas dos economías como integrantes de la fábrica mundial. En el caso del país asiático, no solamente es un proveedor importante para el mercado norteamericano sino también exporta los productos a México cuya mayoría se concentra en los de insumos, componentes e intermedios. Por su parte, el aumento de la capacidad productiva y de la exportación mexicana depende cada vez más de la importación, especialmente procedente de China, lo cual ha propiciado una supuesta tendencia decreciente del contenido nacional dentro de las exportaciones mexicanas hacia los mercados del resto del mundo en varias ramas manufactureras.

a) Contenido doméstico en las exportaciones mexicanas y la presencia de productos chinos en las cadenas productivas nacionales

Algunas investigaciones van todavía más allá de lo anterior y critican a los programas diversos instrumentados por las autoridades competentes, pues ellos han propiciado una tendencia decreciente del valor agregado generado por las empresas altamente exportadoras en su producción total. Presuntamente, la modalidad de operación bajo estos programas conviene y facilita a la planta productiva importar la mayor cantidad de insumos y asimismo reexportar la mayor proporción de los productos debido a que la importación temporal es libre de impuestos y éstos sólo son sobre el valor agregado “importado” en el país de destino de la re-exportación, por lo que en su lógica está excluida la formación de eslabonamientos productivos internos y el direccionamiento de la producción hacia el mercado interno. Por ello, los únicos encadenamientos productivos que puedan tener lugar en el espacio nacional responderían a una lógica empresarial global y no de desarrollo nacional, lo que espacialmente se traduce en la fragmentación y el desmantelamiento (Ordoñez 2014).

Concretamente, por mencionar un ejemplo específico, de encadenamiento hacia atrás y hacia adelante, la industria electrónica tiene fuertes capacidades de articular y dinamizar el crecimiento de la economía nacional, puesto que casi el 90% de su producción está constituido por capital constante o insumos que requieren de provisión por parte de otras actividades productivas, mientras que casi el 75% de esa producción va dirigida al consumo intermedio de otras actividades. Sin embargo, los altos coeficientes en México de importación y exportación en este sector industrial particular son de 77% y 98%, respectivamente (Ordoñez, *op. cit*). Por ello, estos encadenamientos tanto de demanda de componentes de capital constante provistas por otras actividades como de oferta dirigida al consumo productivo de otras cadenas eslabonadas, en lugar de fomentar la economía local y nacional, han sido proclives a articularse directamente con la proveeduría a nivel internacional.

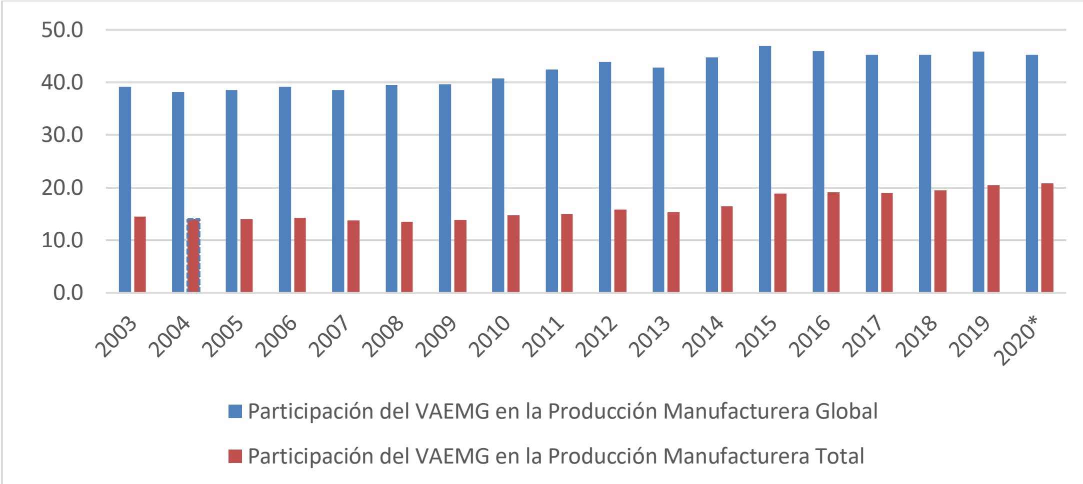
De tal manera, se observa que México ha aumentado su dependencia de productos importados, particularmente procedentes de China, sobre todo a partir de 2001, ya que en la primera fase (1993-2000) las plantas productivas altamente exportadoras estaban integradas local y nacionalmente.

En el mismo sentido, Morales (2019) menciona que uno de los hallazgos de su trabajo es la falta de capacidad de la industria mexicana de exportación hacia Estados Unidos (inmeusa) de aumentar la participación de contenido nacional dentro del valor exportado por las cadenas globales de valor.

Asimismo, un estudio elaborado para el Centro de Estudios de las Finanzas Públicas de la H. Cámara de Diputados (2017: 25-26) externó que la apertura de la economía de los años ochenta del siglo pasado explica parcialmente la desaparición de una buena parte de la base industrial que podría haber sido la proveeduría integral de las empresas altamente exportadoras en México. Dada la falta de suministro local de insumos, componentes y bienes intermedios para satisfacer los requerimientos de las empresas con vocación exportadora, el gobierno mexicano ha optado por establecer programas para permitir la importación libre de arancel de insumos, componentes, maquinaria y equipo a través de programas de maquiladora o Programas Sectoriales. Ello se explica por la necesidad del gobierno de ofrecer una solución inmediata a las necesidades de proveeduría de una planta industrial que, para mantener su competitividad a nivel global, debe de tener acceso a insumos en precio y calidad de clase mundial. Sin embargo, esta “salida fácil” también ha ido en dirección opuesta al fomento de una política integral de desarrollo de proveedores y encadenamientos productivos que permita que empresas locales se puedan integrar a la cadena de suministro de empresas vinculadas a la exportación.

b) Variación del contenido nacional en la producción total, 2003-2020

Sin embargo, estas apreciaciones sobre el desarrollo de cadenas de valor nacionales y su integración a las plantas exportadoras concuerdan solo parcialmente con las cifras estadísticas. De acuerdo con la información publicada por el Instituto Nacional de Estadística y Geografía (INEGI), la participación del contenido nacional de las exportaciones globales (VAEMG) en la producción manufacturera global ha registrado un aumento permanente desde 2003 hasta 20120, al pasar de 39.2% a 45.2%, con una mejoría neta de 6.0 puntos porcentuales. Por su parte, la importancia de este mismo VAEMG dentro de la producción manufacturera total incrementó de 14.5% a 20.8% en los dos lapsos respectivos, con una ganancia de 6.3 puntos porcentuales, a pesar de las disminuciones observadas en el periodo de 2003 a 2009 para este último caso (Gráfica 2).



Gráfica 2: Variación Porcentual de la Participación del Contenido Nacional en la Producción Manufacturera, 2003-2018.

PMG: Producción Manufacturera Global = Exportaciones Globales.
VAEMG: Valor Agregado de Exportación de la Manufactura Global = Contenido Doméstico de las Exportaciones Globales.
Cifras de 2020 son preliminares.
Fuente: Elaboración con base en estadísticas de INEGI.
https://www.inegi.org.mx/temas/pibval/.

En términos de sectores manufactureros, entre las diez ramas industriales, las cifras del INEGI indican que de 2003 a 2018, la mitad de ellas (3361, 3363, 3344, 3391 y 3336) registró un incremento del contenido nacional tanto en la producción total como en la global, mientras que las otras cinco, con cifras negativas (Cuadro 2). Se puede observar, dentro de las ramas cuyo contenido nacional tuvo un repunte en la producción, la mayoría de ellas se encuentran relacionadas con el sector automotriz. Por su parte, las actividades involucradas con las telecomunicaciones, informática y equipo han tendido a incorporar más productos importados en su producción al bajar el contenido doméstico en el lapso analizado.

Cuadro 2: Variación Porcentual del Contenido Nacional en las Ramas Principales de la Producción Manufacturera, 2003-2020

Rama	Sectores	Participación del VAEMG en la Producción Manufacturera Total				Participación del VAEMG en la Producción Manufacturera Global			
		2003	2010	2015	2020	2003	2010	2015	2020
3361	Fabricación de automóviles y camiones	33.5	37.2	39.7	38.4	63.6	65.0	65.8	58.2
3363	Fabricación de partes para vehículos automotores	10.2	11.9	17.4	17.9	18.4	22.6	28.5	27.0
3314	Industrias de metales no ferrosos, excepto aluminio	43.0	52.0	46.2	40.6	65.2	78.0	79.3	70.8
3344	Fabricación de componentes electrónicos	23.3	16.6	28.0	28.2	23.7	17.0	29.6	29.9
3343	Fabricación de equipo de audio y de video	28.9	12.8	19.2	20.0	34.0	13.5	20.5	20.3
3341	Fabricación de computadoras y equipo periférico	23.7	10.2	11.1	11.5	34.8	20.4	26.5	20.0
3353	Fabricación de equipo de generación y distribución de energía eléctrica	29.4	25.4	26.1	28.7	35.5	36.0	37.5	36.1
3391	Fabricación de equipo no electrónico y material desechable de uso médico, dental y para laboratorio, y artículos oftálmicos	14.9	16.6	19.5	23.5	24.9	22.7	22.3	27.1
3336	Fabricación de motores de combustión interna, turbinas y transmisiones	22.7	26.5	42.2	32.4	40.1	40.6	57.3	44.0
3342	Fabricación de equipo de comunicación	15.4	17.3	15.1	9.8	20.1	20.3	19.8	11.8

Fuente: Elaboración propia de acuerdo con la información de INEGI.

Es importante señalar que dos de las cinco ramas industriales con cifras negativas en materia de la incorporación del contenido nacional en sus producciones respetivas han registrado mejorías paulatinas desde 2010. Concretamente se trata de las ramas 3343 (Fabricación de equipo de audio y de video) y 3353 (Fabricación de equipo de generación y distribución de energía eléctrica).

Lo anterior indica que, en primer lugar, a nivel nacional, el contenido nacional en la producción manufacturera ha tenido un comportamiento creciente, lo cual se traduciría en un vínculo cada vez más estrecho entre el sector exportador y los eslabones nacionales de suministro. En segundo lugar, también es cierto que este mejoramiento en la integración nacional de las cadenas productivas ha sido heterogéneo entre los distintos sectores, y que lo mismo sucedió entre las diferentes etapas del crecimiento de acuerdo con la evolución de las ventajas competitivas a raíz de la entrada en vigor del TLCAN. En tercer lugar, la integración de las cadenas mexicanas con las de China de alguna manera, ha compensado la pérdida relativa de las ventajas competitivas derivadas del TLCAN, situación que se ha traducido en un estímulo adicional para incentivar el dinamismo de la capacidad exportadora de la planta productiva mexicana.

IV. Análisis Cuantitativo Entre los Flujos Comerciales China-México-Estados Unidos

Para la estimación del modelo entre los flujos comerciales sostenidos por México, Estados Unidos y China, se asume que las exportaciones mexicanas hacia el mercado norteamericano forman una demanda, de manera tal que fungen como una variable independiente. Asimismo, las importaciones procedentes del país asiático realizadas por las empresas locales de México se comportan como la variable dependiente del mismo modo que las variables dicótomas D0 y D1 que identifican los distintos intervalos de tiempo en que se divide el periodo; a saber, 1993-2000, 2001-2008 y 2009-2019. La formalización se muestra a continuación:

$$\begin{aligned} Ln(Imp_{ChMx}) = \alpha_0 + \alpha_1 D0 + \alpha_2 D1 \\ + \beta_0 Ln(Exp_{MxEU}(-1)) \\ + \beta_1 Ln(Exp_{MxEU}(-1) \\ * D0) + \beta_2 Ln(Exp_{MxEU}(-1) * D1) \end{aligned}$$

Donde: $\log\left(Imp_{ChMx}\right)$ representa las importaciones realizadas por las empresas mexicanas desde China en términos de logaritmo natural.

$\log\left(Exp_{MxEU}\right)$ se refiere a las exportaciones mexicanas hacia el mercado norteamericano en términos de logaritmo natural.

a) Resultados de la regresión

Con el propósito de mejorar la especificación del modelo de regresión, se añadió una variable ficticia, DUM01, para eliminar los efectos causados por las desviaciones registradas en 2001, año que representa un cambio estructural debido a que China formalizó su expansión con su adhesión a la OMC, y entre las partes del TLCAN, entró en vigor el Artículo 303.

Después de la estimación del modelo de regresión y podemos observar que los errores se encuentran distribuidos normalmente (Cuadro 3).

Cuadro 3: Resultados de Regresión del Modelo (Agregado con la Variable Ficticia DUM01)

Variable	Coefficient	Std. Error	t-Statistic	Prob.
C	-7.520715	0.901474	-8.342686	0.0000
LOG(X(-1))	1.764619	0.207875	8.488867	0.0000
D0	-4.870857	2.263338	-2.152068	0.0432
D0*LOG(X(-1))	1.197550	0.454320	2.635917	0.0154
D1	4.630799	1.856722	2.494072	0.0210
D1*LOG(X(-1))	-0.520809	0.353544	-1.473108	0.1556
DUM01	-1.012690	0.212729	-4.760468	0.0001

R-squared	0.990709	Mean dependent var	2.716087
Adjusted R-squared	0.988054	S.D. dependent var	1.752370
S.E. of regression	0.191530	Akaike info criterion	-0.255225
Sum squared resid	0.770360	Schwarz criterion	0.077826
Log likelihood	10.57315	Hannan-Quinn criter.	-0.153408
F-statistic	373.1950	Durbin-Watson stat	1.913039
Prob(F-statistic)	0.000000		

Fuente: Elaboración propia de acuerdo con los resultados obtenidos de E-views.

De misma manera, se comprueba que en el lapso 2009-2021 el coeficiente de D1 es no significativo estadísticamente y las ecuaciones estimadas para cada lapso quedan de la siguiente manera:

a) 1993-2000

$$Ln(Imp_{ChMx}) = -7.520715 + 1.764619Ln(Exp_{MxEU}(-1))$$

b) 2001-2008

$$Ln(Imp_{ChMx}) = (\alpha_0 + \alpha_1) + (\beta_0 + \beta_1)Ln(Exp_{MxEU}(-1)) +$$

$$Ln(Imp_{ChMx}) = (-7.520715 - 4.870857) + (1.764619 + 1.197550)Ln(Exp_{MxEU}(-1))$$

$$Ln(Imp_{ChMx}) = -12.391572 + 2.962169Ln(Exp_{MxEU}(-1))$$

c) 2009-2021 (la variable dicótoma no significativa estadísticamente)

$$Ln(Imp_{ChMx}) = -12.391572 + 2.962169Ln(Exp_{MxEU}(-1))$$

Para efectos de la especificación del modelo, es preciso mencionar la diferencia entre las variables D0 y D1 con la variable DUM01.

Las variables dicótomas D0 y D1 muestran si una característica se cumple o no; en este caso, pertenecen a un periodo específico. Por su parte, la variable DUM01 es una variable ficticia que extrae los efectos del cambio estructural que existió en 2001. (Todas las variables del modelo se presentan en el Anexo 1)

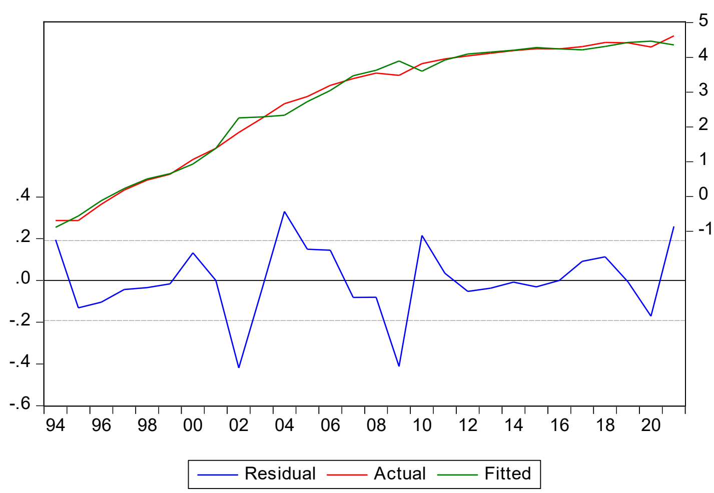
Para este modelo de regresión, los errores acreditan con la prueba de homocedasticidad, ausencia de autocorrelación, y distribución normal (Cuadro 4).

Cuadro 4: Pruebas de Especificación del Modelo

Prueba	*Valor_p*
Normalidad (jarque-Bera)	0.3095
Estadístico F	0.0000
White (con términos cruzados)	0.3904
ARCH	0.7813
Breusch-Godfrey	0.2277
Durbin-Watson	1.9130

Fuente: Elaboración propia de acuerdo con los resultados obtenidos de Eviews.

Asimismo, en la Gráfica 3 se muestra el comportamiento de los errores derivados del modelo con respecto a las cifras observadas.



Fuente: Elaboración propia de acuerdo con los resultados obtenidos de Eviews.

Gráfica 3: El Comportamiento de los Errores de la Regresión del Modelo

b) *Conclusiones del modelo de regresión*

En primer lugar, como se puede observar, la tendencia muestra un cambio estructural entre los flujos comerciales México-Estados Unidos (las exportaciones mexicanas destinadas al mercado norteamericano) y México-China (las importaciones mexicanas procedentes de China) en 2001 por la presencia de la variable DUM01.

En segundo lugar, de 2001-2021, el cambio estructural se ha mantenido sin cambio entre las dos series analizadas; ante la crisis financiera ocurrida en 2009, el hecho de que el coeficiente de la variable dicótoma D1 resulte no significativo estadísticamente implicaría que la relación sostenida entre las dos variables involucradas en el modelo de regresión desde 2001 no sufriría modificaciones.

En tercer lugar, en el periodo 1993-2000, por cada punto porcentual de variación de las exportaciones mexicanas hacia a Estados Unidos, se generaría un ajuste en el siguiente año de 1.76 puntos porcentuales de las importaciones procedentes de China en el mismo sentido. Sin embargo, para el periodo 2001-2021, la misma cifra aumentó a 2.96, lo cual significa mayor necesidad de importar productos originarios del país asiático de 1.20 puntos porcentuales adicionales para sostener un punto porcentual en el cambio de las exportaciones mexicanas, lo cual implicaría una vinculación mayor en comparación con la registrada en el periodo 1993-2000.

V. Perspectivas de los Flujos Trilaterales Entre México, China y Estados Unidos

- De acuerdo con los resultados derivados del análisis cuantitativo, existe una relación positiva entre las exportaciones mexicanas al mercado norteamericano y las importaciones procedentes de China para México; es decir, la mayor adquisición de productos originarios del país asiático fue una consecuencia de la mayor venta de productos mexicanos destinados a Estados Unidos.
- La posible sustitución de bienes nacionales por los importados podría ser una conclusión polémica, ya que, de acuerdo con las cifras reveladas por el INEGI, el suceso duró un lapso corto, además de que ocurrió cuando las exportaciones mexicanas al mercado norteamericano, en lugar de disminuir su volumen, han sostenido una tasa de crecimiento positiva en el mismo periodo. Por ello, en términos absolutos, el valor agregado generado por las plantas productivas altamente exportadoras no necesariamente implicaría una caída.
- Las importaciones mexicanas provenientes de China incentivarían tanto las exportaciones mexicanas hacia Estados Unidos como la integración de los eslabonamientos nacionales con los sectores altamente exportadores, o al menos dichas importaciones no están vinculadas con la variación del contenido nacional en las ventas hacia exterior, un tema que motivaría seguramente discusiones posteriores en los sectores privados, públicos y académicos.
- Finalmente, la potencial reconfiguración de las cadenas globales de valor a nivel mundial también podría significar un traslado de suministro desde China que ha venido realizando hasta la fecha hacia los demás países asiáticos ante la aplicación del Tratado Integral y Progresista de Asociación Transpacífico (TIPAT o CPTPP, por sus siglas en inglés), en el cual México, Malasia y Vietnam son miembros participantes. Todos estos podrían implicar modificaciones posibles de los vínculos existentes de los flujos comerciales China-México-Estados Unidos, lo cual requiere de estudios adicionales para su cuantificación.

Anexo 1: Datos Utilizados en el Modelo de Regresión en Miles de Dólares

AÑO	EXPO	IMP	D0	D1	DUM01
1993	42,911,543	386,442	0	0	0
1994	51,618,594	499,655	0	0	0
1995	66,273,641	520,580	0	0	0
1996	80,570,022	759,704	0	0	0
1997	94,376,864	1,247,376	0	0	0
1998	103,001,767	1,616,494	0	0	0
1999	120,262,033	1,921,057	0	0	0
2000	147,399,940	2,879,620	0	0	0
2001	140,564,406	4,027,253	1	0	1
2002	141,897,649	6,274,381	1	0	0
2003	144,293,352	9,400,591	1	0	0
2004	164,521,981	14,373,843	1	0	0
2005	183,562,833	17,696,338	1	0	0
2006	211,799,370	24,438,279	1	0	0
2007	223,133,251	29,743,656	1	0	0
2008	233,522,728	34,690,310	1	0	0

2009	185,101,145	32,528,967	0	1	0
2010	238,684,422	45,607,551	0	1	0
2011	274,426,516	52,248,003	0	1	0
2012	287,842,151	56,936,129	0	1	0
2013	299,439,147	61,321,376	0	1	0
2014	318,367,009	66,257,292	0	1	0
2015	308,864,917	69,988,130	0	1	0
2016	302,580,857	69,524,935	0	1	0
2017	326,868,566	74,150,446	0	1	0
2018	358,281,301	83,510,571	0	1	0
2019	370,766,747	83,030,916	0	1	0
2020	338,701,075	73,505,697	0	1	0
2021	398,782,240	101,021,447	0	1	0

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The Most Spiritual and Morally Developed Viewpoints for the Modern Economic Thought

By Iqboljon Mashrabjonovich Odashev

Abstract- According to the article, spirituality should accompany economic development as one of the primary criteria for improving disciplines on the behavioral etiquette of the people while cooperating in socio-economic activities. The article also examines spirituality as a factor in economic poverty reduction, the importance of establishing a market economy based on strong spiritual values, the impact of society on centuries-old spiritual traditions, and the impact of the "human-society-state" system.

Keywords: spirituality, economy, harmony, the market economy, social welfare, common interests.

GJHSS-E Classification: DDC Code: 343.519087 LCC Code: KPA3406

The Most Spiritual and Morally Developed Viewpoints for the Modern Economic Thought

The Spiritual Approach for the Modern Economy

Iqboljon Mashrabjonovich Odashev

Abstract- According to the article, spirituality should accompany economic development as one of the primary criteria for improving disciplines on the behavioral etiquette of the people while cooperating in socio-economic activities. The article also examines spirituality as a factor in economic poverty reduction, the importance of establishing a market economy based on strong spiritual values, the impact of society on centuries-old spiritual traditions, and the impact of the "human-society-state" system.

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"The highest spirituality is an invincible force."[1]

I. Introduction

The national economy and spiritual life of the people have always been inextricably linked. People work, activate, talk, live, and engage each other in everyday life. And it is impossible to imagine these continuous connections without behavioral, disciplinary and social norms of etiquette. Because the economy is not limited to getting profits and expenditures, people should respect one another regardless of the scale of economic activity. Positive changes replace serious negative actions in human interactions and relationships at all stages of human development, from the emergence of human society. These changes are a sense of spiritual uplift, which embodies human behavior, character, and relationships. Spirituality and morally developed viewpoints are a concept that encompasses the positive traits that many people share, such as spirit, intellect, perception, state of mind, inner mood, courage, essence, care, and sadness. Spirituality is the sum of a person's spiritual and mental worlds. The primary purpose of the paper is to make the economic relationships based on the spiritual, behavioral and socio-economical etiquette and get socio-economical welfare of the people.

We often hear or read about different kinds of criminal topics or issues on the internet, newspapers, journals, TV-set, radio and other media resources such as "*What scammers do in the digital age and how they get away with it for so long*", "*Italian businessman made a fortune by counterfeiting Supreme clothes*", ""*Unusual traffic": How Chinese hackers bankrupted Canada's largest corporation*". Such kinds of information we can find any media resources and every single day. But how can we solve these issues before it has done? Is it possible? Or should we, once again, be limited and forced solely by law enforcement agencies? What other mechanisms exist to deal with such situations to prevent crime or disrupt the balance of economic activity and social, spiritual, moral, and behavioral communities? During the paper, we can open the morally developed viewpoints and behavioral disciplines which can be made mechanisms to prevent criminal and nonbehavioral economic activities.

II. Literature Review

The ideologies of Central Asian thinkers and folklore play an essential role in forming in the national economy. As one of Central Asia's medieval scientific and cultural centers, its positive impact on the Renaissance process in other regions has been confirmed by global science. Samarkand hosted an international conference in May 2014 on "*Historical heritage of medieval scholars and thinkers, its role and significance in the development of modern civilization,*" with scientists, representatives of leading international organizations, and scientific centers from nearly 50 countries in attendance. President of the Republic of Uzbekistan in his speech provided a deeper understanding of the significance of our great ancestors' rich spiritual heritage. (Boriy Alixonov & Abdurakhim Qurbanov, 2015)

Uzbekistan is rich in its historically behavioral and moral etiquette rules and socio-economic connections based on the many heritages from the great scholars, scientists and governors.

Spirituality is an integrated aspect of one's personality. It manifests as a desire to live and create creatively by ideals of truth, goodness, and beauty. Spiritual culture includes mental, artistic, aesthetic, moral, environmental, legal, and political components. Great thinkers of the past attributed eternal spiritual, moral, and pedagogical values that have a universal, global character, but a national and ethnic basis, to love for children, devotion to the family and the memory of ancestors, diligence, love for the Motherland, for the

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person, a sense of justice and mutual tolerance, mercy, love for the native language as a life-giving source of the spirituality of the nation, care for the younger generation. (Tolipov U.K, 2017)

The Avesta is one of the wealthiest historical sources for the formation of such ideas. According to research by Uzbek scholars, the Avesta, the sacred book of Zoroastrianism (pre-Islamic), also contains significant economic consepts. For example, "*a man who served all his life on the path of beauty and goodness, light and joy, was pious and truthful, pure and fair, and treated guests impartially.*" *He loves his wife, takes care of the land and livestock, takes care of the human property, takes care of nature, and enjoys it. A person who spends his life in good deeds, pure and just, who does not look at other people's property and preserves the riches of nature like the apple of his eye, expresses spiritual harmony.*" (Khajiev B.D & Abdullaeva R.G, 2016). Also, if you pay attention to the role and export potential of the Great Silk Road in Central Asia, interest in Central Asia, in particular, in the territory of modern Uzbekistan, has long been known and important (politically and economically). According to land, water, climatic, natural, geographical locations, minerals, and wildlife distinguished by historical and current data. Diligence, creativity, loves for the profession and creativity of the population were of great importance.

In the holy book of Islam-the Koran, which is another spiritual basis of our national economy, the activity of human society, and economic relations play an important role. Because economic relations manifest the main characteristics of people. The commandments of the Koran, as a divine commandment to people, are because all people on earth are one family, children of Adam and Eve, and therefore brothers and sisters. In particular, ayat 13 of Surah al-Khujurat says: "*O, humankind! We make you from unit Father (Adam Alaykxsalam) and unit mother (Momo Khavo) by several types of the nation so you can get to know each other and make love.*" Among the most common economic ideas, the Qur'an glorifies honest work, especially the work of farmers, shepherds, and artisans.

By ayat 29 Niso surah we can see this sentence: *"Do not realize your property among yourselves in unjust ways (i.e. theft, robbery, usury, bribery, gambling)! But make a fortune by bargaining.*" All other economic ideas are fundamentally focused on property and inheritance, the sanctity of property, betrayal of one's property (particularly treason), and even envy of one's property are considered a great sin.

It's impossible not to include the names of the East's great intellectuals and scientists, who made important contributions to our nation's economic thinking and the economic theories they proposed. Because their contribution to the further enrichment of our contemporary national economy's spiritual roots is priceless. They are Al-Fargani, Al-Khorezmi, Farabi, Beruni, Ibn Sino, Yusuf Khas Hajib, Nizam-ul-Mulk, Amir Temur, Alisher Navoi, Zahiriddin Muhammad Babur and many others. According to Ibn Sina, *"Animals are content with the benefits of nature, and they deprive people of the benefits of nature. She needs food, clothing and shelter. The animal assimilates the gifts of nature, and man, through his labor, creates food, clothing and shelter for himself. A person must be engaged in agriculture and crafts''* (Khajiev B.D & Abdullaeva R.G, 2016; Yuldashev K & Muftaydinov K, 2000). Yusuf Khas-Khajib, on the contrary, says*: "A person who does not benefit a person is not a dead, lifeless past, but wasted labor".* (Mahmudov T, 2000; Karimov I, 2008). Farobiy comprehensively interprets the ideas of his teacher Aristotle and tries to supplement them, creates a doctrine about the importance of material needs for forming society, and describes the "need" that is essential in economics. The role of labor and labor tools in creating material wealth is determined. In particular, in the thinker's works, the issues of "division of labor" are well covered. Because of the division of labor, production develops as time is spent, the workers' skills increase, a basis is created for introducing technical means, and the advantage of outsourcing each operation to particular people, since all work can be done by one person (master).

European thinkers and scientists analyze the harmony of spirituality and the economy, as well as spirituality and religion. However, all materials investigate the spirituality-based economy, socialite, and humankind's mentality. *Carlos Hoevel* (Catholic University of Argentina, Buenos Aires, Argentina) argues in "Spiritual Meaning of the Economic Crisis" that the economic and financial crisis in 2008 has a spiritual dimension. Behavioral economists believe that the severe and prolonged problem was caused by a series of psychological irrationalities in players' behavior (borrowers, loan originators, investment banks, rating agencies, regulators, and end investors). (Bouckaert L & Zsolnai L, 2012)

In "Religion and Spirituality," Jesuit Scholar *Paul de Blot* (Nyenrode Business University, the Netherlands) examines the complex relationship between religion and spirituality in "Religion and Spirituality." While spirituality is concerned with the soul or spirit, religion is concerned with the existence of a superhuman ruling power, particularly God or gods, which is frequently manifested via worship. Religion is a systematic human approach in supernatural reality that usually includes a set of narratives, beliefs, and behaviors. On the other hand, spirituality is a multifaceted search for a transcendent purpose to life founded on our human experience. (Luk Bouckaert & Laszlo Zsolnai, 2012).

Veerle Draunlans (Tilburg University, the Netherlands, and The Catholic University of Leuren, Belgium) demonstrates in "Gender and Spirituality" that gender approaches spirituality mirror the divided and dichotomous thinking's significant repercussions. It calls for global solidarity and a more prominent and positive role for physical experiences in spiritual life, as well as experiences rooted in men's and women's pragmatic daily lives. (Bouckaert L & Zsolnai L, 2012)

Andrew Newberg (Thomas Jefferson University and Hospital, Philadelphia, USA) argues in "Neuroscience of Spirituality" that for successful synthesis of neuroscience and spirituality, an understanding and preservation of scientific fundamentals must be combined with an analysis of the cognitive elements of religious and spiritual experience. This necessitates a neuropsychological examination of religious and spiritual experiences. (Luk Bouckaert & Laszlo Zsolnai, 2012).

III. Methods and Materials

Spirituality is the basis of human and social culture, which has a strong influence on the formation, transformation, and crisis of a particular economic and social system, the enrichment of which can lead to the development of society and, conversely, to the impoverishment of spirituality. The spiritual and practical actions of man can explain the question of harmony between spirituality and the economy. We can express it based on the following comparative table:

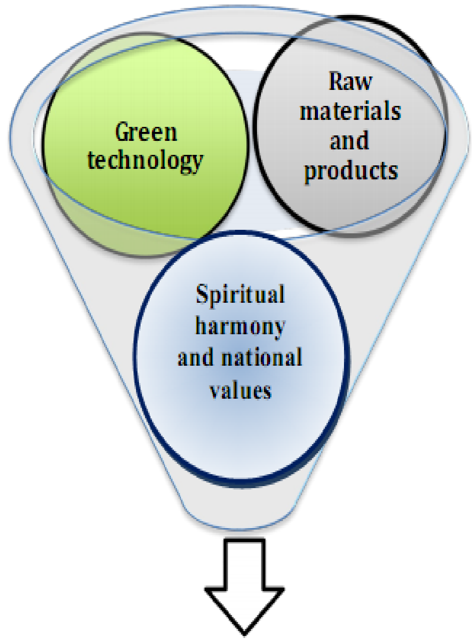
Table 1: Superficial Manifestations of a Person's Spiritual Image Influence His Behavior

The behaviour of a spiritually high person	The behaviour of a spiritually poor person
Creativity, variety of statements	Addiction to evil ideas
Enthusiasm, hard-working	Coldness, laziness, carelessness
Caring for people	The dominance of selfish views
Setting high goals	Lack of purpose, uncertainty about the future
Flawless task execution	Incomplete or incorrect execution of tasks
Respect for the Elders and Respect for the Younger	Work for your benefit
Ethical and aesthetic outlook	Evil intentions, nefarious goals

Source: Created and developed by the author

Its social nature explains the harmony of spirituality with the economy. Because spirituality and economics arise in culture as a social phenomenon. Spiritual poverty also directly reflects the disgusting image of a social phenomenon and has a negative impact not only on nature and society but also on economic procedures. We can analyze this using the terms "spiritual" and "non-spiritual economy". We can assess the integral aspects of the spiritual economy as a set of many economic processes in which they carried economic functions out not only for good and for break but also to achieve the noble aspirations of humanity.

The main goal of enterprises' and organizations' products and services is not to harm human health, not to emit harmful gasses and emissions, the widespread use of green technologies, the production of goods that do not harm local traditions (clothing), human health is reflected in such economic activities as growing and processing consumer goods that bring more benefits. An economy that is out of sync with spirituality is analogous to the socio-cultural and economic development of society, resulting in a sharp change in the established and accepted traditions of nations and peoples, as well as the formation or deterioration of the younger generation's upbringing.



Source: Created and developed by the author

Figure 1: Harmony Between the Economic and Spiritual/Cultural Worldviews

Almost all economic processes necessitate interactions with social processes. These processes can never be mutually exclusive. If economic activity harms the spiritual and cultural ties that exist between these ties, it will not only harm society but may also lead to a decline in economic development. This means that the primary goal of a business should not be the production of goods or services. It also necessitates careful consideration and analysis of how the goods sold here affect consumers' cultural and spiritual worldviews. The protection of the national economy and spirituality is critical when globalization and the spread of mass culture have a significant impact on society, national spirituality, and culture.

IV. Analysis and Outcomes

a) *A Strong Society and the Highest Moral Qualities*

Several changes are occurring in socioeconomic relations due to the global pandemic (Covid-19) that humanity is currently experiencing. It is clear that mass protests against quarantine measures in some countries worldwide result in the formation of iodized images on the spiritual and cultural appearance of the crowd gathered there. Such examples undoubtedly aggravate these countries' economic crises. World business leaders were faced with impossible choices. Should you begin layoffs now or wait for government funds? Pay the rent or the payroll? Which factories will be closed first? How are we going to get rid of this entire inventory? Is it better to start Chapter 11 now or later? Even as airlines and retailers went bankrupt, oil prices plummeted below zero, and death tolls skyrocketed, there were some pandemic bright spots. Pfizer and AstraZeneca have been extremely busy, while Amazon cannot find enough workers. And, as we've learned to live more and more of our lives as digital simulations, it's still surprising that semiconductor behemoths like TSMC and Nvidia can't produce chips fast enough. Forbes' Global 2000 list has been measuring the world's largest public companies in four equally weighted metrics since 2003: assets, market value, sales, and profits. Last year's edition provided insight into the early economic consequences of the Covid-19 pandemic. We are now seeing the results of a year of market turmoil and unfathomable human loss. The outcomes are not entirely negative. With central banks allowing adverse interest rates, investors have concluded that equity investing is the only option. Naturally, the global stock market has increased by roughly 48% last year. So, while the Forbes Global 2000 companies' sales and profits are down, their total assets and market value are up. The minimum market value for inclusion on the 2021 list was $8.26 billion, up from $5.27 billion in 2020. (Andrea Murphy & Isabel Contreras, 2022). However, we continue to see the opposite in countries that have preserved their spiritual and cultural values and are still treated with dignity. This means that spirituality, as a reflection of society, is a complex set of strong spiritual, ethical, and aesthetic views that lead to either development or crisis.

Many people face fierce competition in a market economy, attempting to fully satisfy their well-being, biological needs, and social status. In a highly competitive environment, however, they are prone to various undesirable actions when they are aware of their lack of knowledge and experience. These include familiarity, corruption, victory lust, inability to control one's desires, disregard for others, or boasting of one's hegemony, and the fact that such people participate in this or that economic activity directly harms all normal economic relations. They prevent the economy from functioning normally. To achieve their evil intentions, they sell their conscience, spirituality, and culture. This is the most essential factor in a person's spiritual and cultural deprivation, and it directly leads to socio-economic poverty. A strong market economy promotes optimal economic processes in intense competition, mutually beneficial relationships, and limited resources. Spiritual poverty, on the other hand, does not allow strong market mechanisms to function normally, or it leads to a sharp deterioration and economic impoverishment of society.

According to B.P. Shulindin, *"All forms of social consciousness, although in various forms, reflect social life and, above all, material social relations, which has the opposite effect. The joint evolution of the materialistic and idealistic directions is a dialectical interaction of spirituality and the economic sphere of society"*. (A.Razzakov & Sh.Toshmatov & N.Urmonov, 2002) In the transition from a robust state to a strong civil society, the formation of a strong spirituality and a strong economy are closely interconnected.

The presence of people with high moral qualities in society prevents various clashes and riots from escalating. Along with the COVID-19 pandemic, mass protests and collective conflicts worldwide have resulted in complex social crises. Analyzing this with the help of the following vivid examples, we can see how difficult situations can arise in a society devoid of spiritual beliefs.

Tens of thousands of people protested against COVID-19 measures and government sanctions against the unvaccinated in Australia, France, Italy, and Greece on Saturday, sparking clashes with police. The protests highlight the global conflict between the World Health Organization and other public health agencies' advice and people who refuse to be vaccinated. In the current situation, no country could resolve the Protestant strife peacefully. People with spiritual and moral qualities would not instigate such widespread battle. And such national responsibilities should have been considered before the conflict began.

Example 1: Government-imposed quarantine restrictions to prevent the rapid spread of COVID-19 worldwide has resulted in mass conflicts. This included mass protests in the United States on April 18, 2020, in Michigan, Ohio, Texas, Maryland, Kentucky, and Wisconsin, where protesters created artificially large traffic jams from several cars, and "*Give me the right to get a coronavirus, but don't restrict my freedom*" ("reopen," i.e., stop isolation). During the protests, it was easy to see various violations, humiliations of human dignity, and the disgusting state of society's moral image. (Odashev I.M, 2021)

Example 2: Such large-scale conflicts and unauthorized protests against restrictions on citizens' rights and freedoms in Berlin began on April 19. Protesters first gathered in Rosa Luxemburg Square for a "sanitary protest," then moved to the Kreuzberg neighborhood. Protests against mass quarantine (isolation regime) increased on May 9. Thousands of people from Stuttgart attended. Protests took a smaller but more aggressive form in Berlin. Around 3,000 people turned out for the demonstration in Munich's Marienplatz. In Frankfurt, about 500 people demanded the abolition of the mask regime, sparking mass protests. A spiritual community of individuals would never have created such a situation. (Odashev I.M, 2021)

Example 3: The unrest in Italy began on October 22 in Naples, after a curfew was imposed in the Campania region, and spread throughout the region the next day. After Prime Minister *Giuseppe Conte* imposed new strict restrictions on October 25, protests and riots spread to Milan, Turin, and Rome. The protests were not peaceful, resulting in riots, clashes with police, and looting. The leading causes of these mass conflicts are a lack of a targeted governance approach, a lack of initial and targeted public awareness campaigns about the pandemic, or poor organization. The inadequacy of human spiritual qualities, on the other hand, can explain crowd behavior. (Odashev I.M, 2021)

V. Conclusions and Recommendations

In conclusion, I would like to emphasize that Uzbekistan, which is famous all over the world for its multinational people with a thousand-year history, culture, and spiritual views, are a mirror of their spiritual worldview. Therefore, the formation and implementation of a modern economy and its historical, cultural, and spiritual foundations must be an integral part of today's complex global economic processes. In the further development of international economic relations between the countries of the world, there is a need for a spiritually prosperous economy as an essential tool in creating a world economy that can respond to any unexpected challenges. I believe that such a spiritual economy is vital for today's world, and I would like to make the following conclusions and recommendations for achieving and implementing it:

- ✓ Development and continuous monitoring of all measures to prevent corruption in implementing business processes;

- ✓ Identify spiritual and cultural factors that affect the level of the shadow economy, and conduct regular educational work to develop the spiritual consciousness of a person;
- ✓ When establishing economic ties with the countries of the world, more attention should be paid to the formation of interethnic and intercultural relations;
- ✓ Ensuring the harmony of spiritual values in shaping the foundations of the modern economy;
- ✓ To look into the historical genesis of spiritual ideals, as well as the techniques and criteria that have guided their evolution to the present day;
- ✓ Formation and implementation of targeted mechanisms that ensure the main role of spiritual views in the daily activities of economic entities;
- ✓ Formation of an environment of interest in economic values, and criteria in economic activity;
- ✓ In-depth examination of the works of an essential historical leader in the field of economics that have been passed down to us, as well as an assessment of their relevance to the present economy.

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Happiness and Personal Wealth: A Updated Research Synthesis using an Online Findings Archive

By Antje Jantsch & Ruut Veenhoven

Abstract- Question: How does personal wealth work out on ones happiness? Understanding of the effects of personal wealth on happiness is required for informed decision making in matters of saving and consumption.

Method: In order to answer the question of how and to what extent personal wealth relates to happiness, we take stock of the available research findings on this issue, covering 198 findings observed in 123 studies. We use a new method of research synthesis in which research findings are described in acomparable format and entered in an online findings archive, the 'World Database of Happiness', to which links are made from this text. This technique allows a condensed presentation of research findings while providing readers access to full details.

Results: We found mostly positive relationships between assets and happiness, and negative relationships between debt and happiness. The few longitudinal studies suggest a causal effect of wealth on happiness. We found little difference across methods used and populations studied. Together, the available research findings imply that building wealth will typically add to happiness. However, the average effect sizes are small with an average of 0.11 for total assets and -0.21 for total debts.

Keywords: *life satisfaction, consumption, savings, assets, debt, wealth, research synthesis.*

GJHSS-E Classification: *JEL Code: D14, D32, I31*

HAPPINESSANDPERSONALWEALTHANUPDATEDRESEARCHSYNTHESISUSINGANONLINEFINDINGSARCHIVE

Strictly as per the compliance and regulations of:

Happiness and Personal Wealth: An Updated Research Synthesis using an Online Findings Archive [1]

Antje Jantsch[2] and Ruut Veenhoven[3]

ABSTRACT

Question: How does personal wealth work out on ones happiness? Understanding of the effects of personal wealth on happiness is required for informed decision making in matters of saving and consumption.

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[1] This paper is an extension of the book chapter: Jantsch, A. and Veenhoven R. (2019). Private Wealth and Happiness. A Research Synthesis Using an Online Findings-Archive. In: Brulé G., Suter C. (eds) Wealth(s) and Subjective Well-Being. Social Indicators Research Series, vol 76. Springer, Cham. This version reports 79 more findings observed in 51 more studies. Much of the introductory text is similar.

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1 INTRODUCTION

The concept of cardinal utility, in the tradition of Jeremy Bentham (1789 [2000]), is a notion that is reliant on introspection, and is fundamentally focused on welfare outcomes. This conceptual view is primarily concerned with the question of how much utility a person derives from a particular decision. Bentham equates 'utility' with 'happiness' but offered no indication of what measurements of happiness there could possibly be, so in this context it is interesting to look at happiness research which has become popular among economists over the last 40 years.

Today, happiness is measured in survey studies where people are asked about their life satisfaction and are required to record their answer on a numerical scale. This strand of research developed since the 1960s and has produced a lot of findings, including correlations with key variables in economics such as income and employment. The resulting data allows a view on the effects of economic choices on happiness, for instance whether or not to opt for early retirement at the cost of a lower income. Around the year 2000, this resulted in the development of 'Happiness Economics', in which people's self-reported happiness is regarded by many economists as an appropriate proxy for utility (Frey, 2008, p. ix) and consumption is often represented by income only (cf. Clark *et al.*, 2008, p. 100). From an economic perspective, consumption and its effect on utility is of primary interest. Hence happiness economics has focused on the relationship between happiness and income (cf., for example, Clark *et al.*, 2008; Easterlin, 1995; Frank, 2005). The positive correlation found in these studies between happiness and income can be explained by using classic microeconomic theory: an individual derives utility from consuming goods and services, which can be purchased using current income, saved income (i.e. accumulated wealth) or new debt. Thus, higher levels of income and wealth should lead to higher levels of happiness (utility) through greater consumption opportunities.

In western countries, people typically earn more money than required for their basic needs. Consequently, we face the question of how we should spend this surplus money in order to increase our happiness. In general, people have two options between which they can choose: spending or saving. While spending is likely to increase happiness in the short term, it may reduce happiness in the long term. This dilemma is illustrated in Lafontaine's fable of 'The ant and the cricket', in which the cricket enjoyed the summer singing carelessly, while the ant worked all the time. The cricket ended up unhappy in the winter, while the ant was happy enjoying the fruit of his earlier labor.

This illustration raises the question of how much saving or spending is optimal for long-term happiness. next what is the best way to accumulate wealth? Should one deposit money in a bank account, buy life-insurance, put it into stocks and shares or invest in durables such as a house or car? There are pros and cons; for example, buying a house will provide consumptive reward, but at the cost of financial flexibility. We cannot see into the future, but we can orient on past experience. In this context it is worth knowing how happy people are who have saved or spent more or less, and, in particular, how saving and spending has affected happiness of people with similar personal characteristics and living in similar situations. Bits of such information are available from hearsay and from examples in the media, but we would fare better with data based on scientific research.

Most studies have focused only on one aspect of an individual's financial situation, namely an individual's income, such that their opportunities for consumption are only partially captured (Weinzierl, 2005). Focusing exclusively on income and so ignoring measures beyond income, such as an individual's or household's wealth (financial assets, for example), may lead to misguided or false conclusions regarding the relationship between utility and an individual's consumption levels (Clark *et al.*, 2008). While there have been studies carried out on the relationship between happiness and wealth of nations (cf., for example, Hagerty and Veenhoven, 2003; Schyns, 2002), the relationship between happiness and individual or household wealth has only recently been studied and scarcely so (cf., for example, Brown *et al.*, 2005; Headey *et al.*, 2004; Headey, 2008).

The relationship between happiness and individual wealth (and its various components including assets and debt) has only recently sufficiently and systematically been researched and documented by Jantsch and Veenhoven (2019). This paper is an update of that research synthesis, adding the latest 51 findings.

In this review of research we seek answers to the following questions.

1. How is wealth associated with happiness?
2. How are the different wealth components related to happiness?
3. Do the effects of wealth on happiness differ among nations and populations?
4. What is the effect size of wealth on happiness?

The answering of these questions requires description of the relationship, not an explanation. We draw on an existing collection of research findings on the relationship between happiness and wealth available in the World Database of Happiness. In doing so, we briefly discuss in Section 2 the concepts of happiness and wealth, how they are assessed and their possible relationships with each other. In Section 3, we describe the procedure of this review including a description of the World Database of Happiness and of how we present the results, which are shown in Section 4 and discussed in Section 5. Our conclusions are drawn in the final Section 6.

2 CONCEPTS AND MEASURES

2.1 Happiness

The term 'happiness' is used with several meanings in the literature. In philosophy, it is typically used to denote 'a good life', covering both objective aspects of life and subjective enjoyment of life. In this paper, we focus on happiness as the subjective enjoyment of life and consider it in relationship with an objective condition, one's material wealth.

Definition of happiness

We focus on 'happiness' in the sense of the 'subjective enjoyment of one's life as a whole', which is also called 'life satisfaction'. This definition of happiness is delineated in detail in Veenhoven (1984). The differences with related notions of subjective well-being are analyzed in Veenhoven (2000).

Components of happiness

Our overall evaluation of life draws on two sources of information: (1) how well we feel most of the time and (2) to what extent we perceive we are getting from life what we want from it. Veenhoven (1984, p. 25-27) refers to these sub-assessments as 'components' of happiness, called respectively 'hedonic level of affect' and 'contentment'.

The affective component is also known as 'affect balance', which is the degree to which positive affective (PA) experiences outweigh negative affective (NA) experiences (Bradburn, 1969). Positive experiences typically signal that we are doing well and encourage functioning in several ways (e.g. Fredrickson, 2004). They also protect health (e.g. Veenhoven, 2008). The affective component tends to dominate in the overall evaluation of life (Kainulainen *et al.*, 2018).

Measures of happiness

Since happiness is defined as something that is on our mind, it can be measured using questioning. Various ways of questioning have been used, direct questions and indirect questions, open and closed questions, one-time retrospective questions and repeated questions on happiness in the moment. Some illustrative questions are:

- *Question on overall happiness:*
  Taking all together, how happy would you say you are these days?
- *Questions on hedonic level of affect:*
  Would you say that you are usually cheerful or dejected?
  How is your mood today? (Repeated over several days)

- *Question on contentment:*
  1) How important are each of these goals for you?
  2) How successful have you been in the pursuit of these goals?

A review of strengths and weaknesses of measures of happiness and their applicability in different contexts is available in Veenhoven 2017.

2.2 Wealth

Definition of wealth as 'stocks'

In this paper we focus on 'wealth' in the sense of material possessions; we do not consider non-material resources denoted using this term, such as 'mental wealth' or 'moral indebtedness'. Given our research questions, we limit to individual wealth and do not consider assets of groups or nations.

Briefly, wealth is the value of all the material resources an individual possesses. To be more precise, wealth can be defined as the sum of the total monetary value of an individual's assets and the total value of an individual's outstanding balance of liabilities or debts (see Figure 1). Total assets, in turn, are composed of the value of an individual's financial assets such as bank deposits, mutual funds, current accounts, savings account, stocks and shares, pensions or whole life insurances and real assets such as value of properties. i.e. household's main residence, other real estate property, self-employed businesses, vehicles and valuables, such as jewelry. All these different components have different degrees of liquidity, real assets are highly illiquid.

The total outstanding balance of an individual's liabilities consists of a mortgage (secured) debt on a main residence if they have one, or mortgages on any other properties they own and non-mortgage (unsecured) debts such as a credit line, credit card debt or other non-mortgage loans. Suter (2014) distinguishes different kinds of debts, such as by type of creditor (private creditors, official creditors, and multilateral financial institutions) or maturity composition (short-term, medium-term or long-term obligations). These differences have not yet been included in studies on the relation between debts and happiness.

Measures of wealth

Generally, there are two ways to measure wealth; using data from registrations or using self-reports as assessed in surveys. Since we conceptualise wealth 'objectively' as a total of an individual's assets and debts, we do not consider the subjective evaluations individuals hold on their wealth, such as how well off they are compared to other people or how worried they about their debts.

Registration data. Some studies use wealth data which is taken from administrative tax records and used to analyze the wealth structure of specific populations, regions or countries. However, comparisons of

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wealth between different countries are difficult as the tax systems often differ considerably. While there is no administrative data on wealth, estimates of an individual's wealth can be made by utilizing the information provided on taxable income. In this case, the taxable income can be capitalized using a common rate of return on asset types. This procedure, however, does not provide any new information compared with the direct use of the income value. Advantages of administrative data are that the actual values of different wealth components are reported in a very detailed level. Furthermore, large and representative samples are available for analyses, although these data are not gathered for research purposes. Hence, a disadvantage is the lack of individual information such as information on the socio-economic status or subjective data (Browning and Leth-Petersen, 2003, p. F283).

Survey data. The survey-based way to measure wealth is the most commonly used measure for empirical analyses. Here, an individual's wealth is assessed from responses to questions, typically multiple questions on different types of assets or debt. In contrast to survey data on income, the availability of such data on wealth is scarce. While almost everyone can specify their income reasonably well, the situation is different for wealth. There are many difficulties to be overcome recording individual wealth using surveys.

One problem lies in the sampling, which may not cover poor and rich equally well. A second problem lies in responses themselves to the question on wealth, which some respondents refuse to answer because they are not able to determine their own wealth or do not wish to answer for reasons of privacy. It is known, for example, that poor or very wealthy people in particular are more likely to refuse to respond, which will lead to a 'middle class bias' (Frick, 2010). Since it is particularly important for longitudinal studies to keep the attrition rate to a minimum, information on assets is often not collected every year and when it is collected, people are asked to specify their wealth between a certain range rather than be more specific.

Typically, one person, the head of the household, is asked to give information on their individual or household wealth. While the participants in some surveys, such as the German Socio-economic Panel (GSOEP), are only asked about the main components of their assets, other surveys, such as the German Panel on Household Finances (PHF), go into greater detail with specific questions about each asset and debt component (cf., Wagner *et al.*, 2007; Kalckreuth *et al.*, 2012). Typically, net wealth is then calculated based on respondents' replies to the questions on the different wealth components. There are also surveys that use a one-shot question about an individual's or household's wealth to determine the net value of their wealth; however, the fewer questions on the different components of assets and debts asked in a survey, the greater the probability that net wealth of an individual or a household will be underestimated, leading to 'aggregation bias' (Frick *et al.*, 2012).

For a review of advantages and disadvantages of the different measures of wealth see Frick *et al.* (2012).

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2.3 Possible relationships between wealth and happiness

The question remains whether wealth makes people happy, or whether happy people tend to accumulate wealth. We discuss briefly the causal direction between happiness and wealth; i.e. we want to discuss possible mechanisms regarding the possibility that high (or low) happiness levels cause more wealth holdings vs. high (or low) happiness levels are a result of wealth holdings.

Wealth ⇒ Happiness

Wealth can add to long-term happiness in different ways. An obvious causal mechanism is that wealth bolsters one's social esteem, and as a result also one's happiness Yet this will work only for visible wealth and in conditions where wealth is much valued. A more common effect seems to be that wealth provides a sense of security, probably more so among risk averse people. Typically, individuals apply strategies to cope and minimize risk. Risk, for example, can be seen as the volatility of a particular outcome such as an individual's economic performance over time. To reduce the volatility of their economic performance, individuals can (i) smooth their income by making very conservative production and/or employment choices to avoid income shocks; and they can (ii) smooth their consumption through saving or invest money or having insurances or pension contracts (Morduch, 1995).

Besides income, which is characterized as a periodic, regular received amount of money that can be used for consumption immediately, assets are used particularly to smooth consumption over a life cycle and stabilize an individual's economic situation. Assets provide security against income shocks and serve as security for debt. Finally, yet importantly, assets generate income via investment, which in their turn contributes to happiness. Given these characteristics and functions, one could expect a positive relationship between subjective well-being and assets; however, property, for example, can become a burden as it has to be administrated. This, in turn, can lead to mental distress, which may lower an individual's subjective well-being. Furthermore, wealth can also affect subjective well-being negatively, possible causal effects being the envy of other people and stress resulting from protection of one's property or attitudes indicating problems with financial control (Grnik-Durose and Boro, 2018).

Likewise, indebtedness can affect happiness in different directions and through different causal mechanisms. Tay *et al.* (2017) have developed a conceptual framework where possible mechanisms of debt on happiness are considered. Firstly, assuming that satisfaction with disposable income or other financial resources is part of an individual's subjective enjoyment of their life as a whole, debt may be negatively related to happiness, as debt affects happiness through the financial domain or other life domains. Tay *et al.* (2017) call this a bottom-up spillover' effect of debt. Secondly, total debt lowers an individual's financial resources, which, in turn, means lower consumption opportunities for the individual and therefore lower levels of happiness. The association between subjective well-being and debt is therefore considered from a 'resource' perspective (Tay *et al.*, 2017).

If the different debt components are considered separately, the relationship between happiness and debt can be expected to be both negative and positive. For example, mortgage indebtedness does not necessarily reduce an individual's happiness level, as the individual may achieve through this indebtedness a certain goal, namely owing a house (Tay *et al.*, 2017). Moreover, it is conceivable that if the value of the monthly debt service for homeowners is lower than the rent they would have to pay for a comparable home, they will have a higher disposable income and thus a higher degree of happiness. It is also conceivable that debts which increase one's income or accumulate wealth in the long run, for example obtaining business loan, is positively related to an individual's happiness. Non-mortgage debt or other unsecured debt have found to be negatively associated with happiness (Brown *et al.*, 2005). One reason for a negative effect could be that the added pleasure' of the goods paid for by, for example, credit card is less lasting or is even smaller than the pain' of being in debt.

In conclusion, the distinction between the different types of assets and debts is important, as it is well known that different types of assets or debt in a households' portfolios can have differential effects on life satisfaction (Office for National Statistics, 2015).

Wealth $\Leftarrow$ *Happiness*

Reversed causality is also likely to exist, where happiness influences the accumulation of wealth. One plausible mechanism is that happiness typically broadens' one's behavioral scope and as such fosters the building' of resources (Fredrickson, 2004), in this case material wealth. Happiness also fosters the building of social networks, and as such happy people may more often get assets transferred by parents or through inheritances. Reversed effects may also exist, such as happiness instigating careless consumption like that of the cricket in the above-mentioned Lafontaine fable.

All this illustrates that it is difficult to predict how accumulation of wealth will work out on one's happiness on the basis of *theoretical* deduction. For that reason, we follow an *inductive* approach in this paper, describing the observed relationships between happiness and wealth.

3 METHODS

3.1 Use of a finding archive: The World Database of Happiness

Until now, November 2020, happiness has been the subject of research in around 7,500 empirical studies, and this year around 800 further studies are expected on this subject (Veenhoven *et al.*, 2018, p. 3). This makes it very difficult, almost impossible, to overview all this research. For this reason, the finding archive World Database of Happiness' (WDoH) was set up. This database consists of electronic finding pages' on which quantitative research results are described in a uniform format and terminology. These finding pages are sorted by topic and methodology using fine grained classifications (Veenhoven, 2020). Finding pages are gathered in collections'. Findings on how happy people are in particular populations are gathered in the collection of distributional findings; findings on things that go together with more or less happiness are gathered in the collection of correlational findings. The structure of the WDoH is shown in Figure 2. A recent description of this novel technique for the accumulation of research findings can be found with Veenhoven (2020c). For this review, we used this source for the following purposes.

Gathering studies

Over the years, many findings have been entered in the WDoH, among which are findings on happiness and wealth, sometimes as side results of studies that aimed at other things. We completed the collection up to November 2020 on the basis of an additional literature search. This review is based on scientific publications that report findings on the relationships between happiness and wealth as defined in Subsection 2.1. We also considered studies that report findings on particular changes in wealth such lottery winnings.

Selection of findings

The WDoH limits to the studies that assess happiness as defined in Subsection 2.1 and use a valid measure of that concept. This selection process is described in detail in Chapter 3 of the introductory text to the Collection of Happiness Measures (Veenhoven, 2020d). Selection on a specific *concept of happiness* implies that we have not included studies on the relation between happiness and other kinds of subjective well-being, such as the otherwise interesting papers of Dean *et al.* (2007) and Dew 2008 on marital satisfaction' and the Dwyer *et al.* (2011) study about the effect of wealth on self-esteem'. Selection on *measurement of happiness* implied that we did not include a longitudinal study on financial windfalls in which happiness was measured using a health questionnaire (Gardner and Oswald, 2001). Rigorous selection on a clear concept, in our case happiness well defined, is required for fruitful research synthesis.

Together, we found 123 studies that are linked in the tables of this review and whose links lead to the corresponding finding pages in the WDoH. As far as we know, we have gathered all the qualifying studies available in the Word Database of Happiness up to November 2020.

Standardized description of the findings

In the WDoH, findings observed in selected studies are described individually on electronic finding pages, where a standard format and a well-defined technical terminology is used. Each finding page contains bibliographic information and a link to the original study. Information is provided on the data used, i.e. which population was considered, how many observations were taken into account and information on the respective sample design. Furthermore, it is reported how both happiness and the variable of interest, in our case wealth, were operationalized in the respective study. The methods used and eventual control variables are specified and the results presented in the form of statistical indicators. This standardization is required to enable accurate comparisons of research findings and prevent confusion due to different presentations in the original research reports. Complete and accessible storage of all details using standard notation is required for controllable reviews. This way of uniform notation is described in detail in chapter 3 of the Introductory Text to the Collection of Correlational Findings of the WDoH (Veenhoven, 2020b). An example of a finding page on happiness and wealth is given in Figure 3.

Storing the findings

The finding pages are entered in the electronic archive and made available on the Internet, where they can be easily found in searches, such as on subject, population, research technique and bibliographics. This makes the results more assessable than in the original research reports and lays the foundation for continuous accumulation of knowledge, as qualified new findings can be added at will according to the standard format. This paper is already an update of the research synthesis by Jantsch and Veenhoven (2019), adding 79 findings obtained from 51 new studies. The findings on happiness and wealth are stored in the subject section Happiness and Possessions' (Veenhoven, 2020b) of the Collection of Correlational Findings.

Presenting the findings

This technique of using a findings archive gives us a new way of displaying research results in a review paper. Quantitative research findings can be simply summarized using a sign or a number, with a link which will lead to an online findings page in the WDoH with full detail of the particular finding. This enables us to present a large number of findings in a few tabular overviews. This novel way of reporting is explained in more detail below in Subsection 3.2.

3.2 Presenting of findings in this review

We applied a new presentation technique, which takes advantage of two technical innovations: 1) the availability of the above described online *finding archive*, which holds standardized descriptions of quantitative research findings, presented on separate *finding pages*, each with a unique internet address. 2) The change in academic publishing from text printed on paper to text on screens, into which *links* to online information can be inserted. We call this 'link-facilitated research synthesis'.

Notation of the findings

We present the findings differentiated according to net wealth and the various wealth components in tables. The observed statistical relationships are indicated using signs, which link to the respective finding pages in the WDoH. Using control+click the reader will get to the page containing the full detail about a particular research finding.

We present the observed statistical relationships between happiness and wealth with the help of + and – signs. Whereas + sign indicates a positive correlation, a – sign denotes a negative correlation between happiness and wealth. These signs are to be considered independent of the effect size. If a finding in the originally study is statistically significant, we will mark it using a bold sign: **+** or **−**. If different results are reported for different specifications, we will use a string of symbols: a finding, for example, showing +/+/− indicates that subsequent controls have changed an initial positive correlation to a negative correlation. Clicking these signs links to the respective finding page. In Table 4, we consider the shape or the observed relationship and distinguish between linear relationship (indicated /) and curvilinear pattern (indicated ⌈).

We also consider the observed *effect sizes*. Here we met the problem that different statistics which show the degree of association have been used in the different studies, many of which are not comparable; e.g. Odds Ratio's and Ordered Probit Coefficients. For that reason, we limited our overview of observed effect sizes to correlation coefficients standardized on a range from -1 to +1. For bivariate correlations we used the Pearson Correlation coefficient (r) and for partial correlations as a result of multiple analysis the standardized regression coefficient obtained from OLS regressions ($Beta$). We computed the average effect size based on the Pearson correlation coefficient r using Fisher's z transformation $z = 0.5 \cdot \ln(\frac{1+r}{1-r})$ and the standard error SE considering the number of observations n: $SE_z = \sqrt{\frac{1}{n-3}}$ (Borenstein *et al.* 2009: 42).

The standardized regression coefficients $Beta$ result from a linear regression in which the independent and dependent variables have been standardized, i.e. the expected value equals zero and the variance equals one. If no standardized regression coefficients were reported in the original studies, we calculated them on the basis of the given regression coefficients: $Beta_j = B_j \cdot \frac{s_{x_j}}{s_y}$, with B_j being the regression coefficient of the explanatory variable x_j, s_{x_j} the standard deviation of x_j and s_y the standard deviation of the explained variable y. These effect sizes are presented in stem-leaf diagrams.

Differentiation by research design and statistical analysis applied We organized the findings in separate tables. We started with a presentation of all 198 findings, distinguishing between findings on net wealth, total assets and debt, and their components, respectively (Table 1). The 9 findings that indicate the shape of the relationship between happiness and wealth are shown in Table 4. For a more refined picture, we assigned all findings to their respective categories, for example, savings or stocks within financial assets (see Table 5), and mortgage or business debt within secured debt (see Table 6). Furthermore, we split all findings on the relationship between assets and debt by nations (see Table 7 and Table 8, respectively).

We distinguished between studies that make use of (1) cross-sectional data, in which the same-time correlation between levels of wealth and happiness is assessed, (2) longitudinal data, in which the relationship between change in assets or debt and change in happiness is assessed, and (3) experimental data, in which the effect of induced change in assets or debt on change in happiness is assessed. Longitudinal and experimental data provide more information about causality, while experimental data provides the most information about the direction of causality. The latter studies are the most informative for answering research question 2 regarding how different wealth components relate to happiness, yet they are the least numerous. All we found is one study on the effect of lottery winning on happiness, which can be seen as a natural experiment'. Several studies report findings using more than one statistical analysis, which explains the same finding pages appearing in different columns of the tables and thus the difference in numbers between considered studies (123) and findings (198) in this review.

To the best of our knowledge, however, none of these studies claim to be causal, which in turn increases the risk of spurious correlation; i.e. the relationship between wealth and happiness is explained by a third factor not considered, for example marriage. One could imagine that marriage influences both the accumulation of wealth and happiness without a connection between the two. This problem is most pressing in studies that use cross-sectional data but can also exist in studies that use longitudinal or experimental data. In order to face the problem and to get a more refined picture, multiple analysis is usually carried out. This approach involves the risk of over-control, in which true variance is removed, for example when control for marital status wipes out the correlation between house-ownership and happiness, while having a house actually adds to happiness through better marriage chances. In the tables, we distinguished between (a) bivariate correlations and (b) partial correlations. For the partial correlations, we further distinguish between three methods: Ordinary Least Squares (OLS), Ordered Probit/ Ordered Logit (OPL), and Instrumental Variable analysis (IV).

Advantages and disadvantages of this link-facilitated review technique

This kind of literature review, a link-based research synthesis, has several advantages over traditional reviews. While traditional literature review articles are restricted to the printed page, a link-based research synthesis like this one can take advantage of the Internet (Veenhoven *et al.*, 2018). Since the links provided in this text lead the reader directly to research results that follow standardized descriptions, verification with the available data is faster and easier. In addition, empirical studies in traditional literature review articles can often only be selectively explained and cited due to lack of space. The referencing in a link-based review, in contrast, is almost complete. In other words, our new method allows all studies to be considered and thus avoids the danger of cherry picking'. It also provides easy access to much more detailed information in the online finding pages.

A disadvantage is that much detail is not directly visible in the signs by which the quantitative relationships are summarized, in particular the effect size and control variables used. Further disadvantages are that links work only in electronic texts. This technique requires the creation of a specialized findings archive infrastructure, the establishment of which will only be worthwhile if a lot of research has been covered and a long-term perspective needs to be taken on the type of research being archived.

4 RESULTS

4.1 Does wealth add to happiness?

We divided this question into three parts: 1) Are wealthy people happier and are indebted people unhappier? 2) If so, is this a spurious correlation? 3) If not, does wealth affect happiness, or is the effect a result of reverse causality; ie. happy people gather more wealth? Using the findings presented in Table 1, these questions can be answered as follows.

Wealthy people are happier

In Table 1, all 198 findings on the relationship between happiness and wealth are shown. Focusing on net wealth, the second column shows the simple bivariate correlation between happiness and net wealth, which is in most cases positive. Clearly, the people who are better off tend to be happier than the people who are worse off. A similar picture emerges when looking at the partial correlations: when controlling for other important determinants of happiness the coefficient for net wealth remains positive and statistically significant in most cases. Only two findings for a sample containing the unhappy' suggest a negative relationship between net wealth and happiness. Another finding by Knight *et al.* (2009) suggests a negative relationship when an instrumental variable approach was used with income as the instrumented variable.

When we have a look at financial assets, a positive relationship between happiness and financial assets is revealed, with two exceptions. Firstly, financial assets are negatively related to happiness for rural-urban migrants in China, although the regression coefficient is not statistically significant different from zero. Secondly, the regression coefficient for people who own stocks or bonds, which is only one component of financial assets, is negative for West Germans by using an instrumental variable analysis. The studies using longitudinal data, however, reveal a clear positive and statistically significant relationship (see Table 5). The bivariate correlation between happiness and real assets is also positive apart from two exceptions and mostly statistically significant. The statistically insignificant, negative OLS coefficients for real assets in some cases mainly concern home ownership by elderly people or other real assets such as cars.

Indebted people are less happy

The bivariate correlations between total debt and happiness shown in Table 1 suggest that the sum of an individual's or a household's total debt is negatively related to happiness. The picture changes if we distinguish between secured and unsecured debt. The relationship between happiness and secured debt is mostly positive. Findings based on longitudinal data, and therefore changes in debt over time, confirm this positive relationship between happiness and secured debt. The one non-significant positive correlation results from control for perceptions of relative income, which may have removed part of the worries that go with indebtedness. Mixed results appear for the relationship between happiness and unsecured debt.

While the partial correlation of cross-sectional data is positive, two findings based on longitudinal data and therefore on changes in unsecured debt show a clear negative relationship between total debt and subjective well-being.

Not a spurious correlation

The greater happiness of wealthy people could be due to other factors than their wealth, such as a better health or education. Positive correlations can be misleading if homeowners, for example, are more often married and their greater happiness is derived from their marital status. The possibility of spurious relationships can be excluded by conducting multiple regression analyses. This did not change the direction of the correlations and only slightly reduced the number of significant correlations.

At first sight, there are exceptions in the few statistically insignificant, negative OLS coefficients for real assets in some cases (Table 1). These mainly concern home-ownership by elderly people or other real assets such as cars. A possible explanation for the observed negative correlation between happiness and being a homeowner in the study by Mollenkopf and Kaspar (2005) could be the control of satisfaction with several domains of life such as health, housing, living area and leisure time in addition to individual socio-economic characteristics.

Causal effect likely

A non-spurious could still result from reversed causality, happiness facilitating the accumulation of wealth (cf. Subsection 2.3). Several techniques have been used to identify a causal effect of wealth on happiness. Instrumental variable analysis (IV) was applied on cross-sectional data in three studies and shows mixed results: two insignificant positive correlations and two negative correlations, of which one is statistically significant. This latter coefficient results from an analysis where the authors Knight *et al.* (2009) additionally consider the importance of family, friends and religion.

The 18 findings based on longitudinal data that consider changes in happiness following changes in wealth show that growing wealth tends to go with rising happiness; however, happiness can have been raised for other reasons and raise wealth in its trail.

For a definite proof of the causal effect of wealth on happiness we need experimental data. Since laboratory experiments are not really possible on this topic, we must make do with natural experiments and assess whether substantial financial windfalls, such as inheritances and lottery wins, raise long-term happiness. This was the subject of the above-mentioned study by Gardner and Oswald (2001), which regrettably did not use an acceptable measure of happiness. To our knowledge the effect of inheritances on happiness has yet to be assessed. The bivariate findings on lottery winners are not conclusive, since some studies find slightly greater happiness among lottery players, irrespective of winning (Veenhoven, 2018).

4.2 How much does wealth add to happiness?

As noted in Subsection 3.2, we selected findings expressed in a comparable effect size from -1 to +1 and present these in stem-leaf diagrams. The 56 bivariate correlations r for total wealth, financial and real assets obtained in cross-sectional studies vary between -0.03 and +0.36 with an average of +0.11 and a standard error of 0.15 (see Table 2). The 21 partial correlations are about half this size varying between -0.23 and +.018 with an average of -0.012. The effect sizes of the findings obtained from studies that use longitudinal data are in a similar range. The average effect size of the two bivariate correlations is +0.23 and the seven Beta's range between +0.06 and +0.25 with an average of +0.15 and a standard deviation of 0.084.

The observed relationships between total debt, secured and unsecured debt and happiness are shown in Table 3. The three bivariate correlations between total debt and unsecured debt and happiness range from -0.25 to -0.13 ($mean = -0.21$; $SE = 0.14$) and indicate a clear negative relationship. When we look at the partial correlation of cross-sectional data, five out of seventeen findings confirm this negative correlation, as the standardized regression coefficients of total debt and unsecured debt remain negative. Interestingly, twelve partial correlations show a positive relationship between happiness and debt, even though four are not statistically significant. These positive coefficients rely on secured debt or mortgage debt ($mean = -0.001$; $SD = 0.02$). Findings based on longitudinal data, and therefore change in debt, do not confirm this positive relationship between happiness and secured debt ($mean = -0.04$; $SD = 0.03$).

The standardized correlation and regression coefficients do not tell us much about the importance of wealth for happiness. At the moment they only tell us how many standard deviations happiness would change if a certain measure of wealth changed by about one standard deviation. Coupled with the fact that we observe different measures for happiness (sometimes 7-point scale, sometimes a 11-point scale) and for wealth (sometimes the absolute value and sometimes the logarithm of wealth), this makes it difficult to say whether these effects are meaningful or not. To answer this question, we have to compare these average effect sizes with average effect sizes of other variables, such as another monetary variable like income. Standardized coefficients, however, do tell us whether assets or debt are more important for happiness. The average effect size of the regression coefficients for total assets of the studies that used longitudinal data is larger (0.16) than the respective absolute value of the average effect size for debt (-0.06) on happiness. Assuming a causal relationship between wealth and subjective well-being, these results suggest that assets have a greater positive impact on happiness compared with debt having a negative impact. The explained variance in happiness is considered to be smaller than that of non-material resources such as health, which explains about 5% of the variance in happiness (e.g. VanBeuningen and Moons, 2013) and marriage, which explains about 4% (e.g. Schulz *et al.*, 1985).

4.3 Is more always better? What amount of wealth is required for a satisfying life in the long term?

Only eight studies have inspected the shape of the relationship between wealth and happiness and found a pattern of diminishing marginal utility, with a stronger correlation for happiness and wealth in the lower half of the wealth distribution. (see Table 4) None of these studies found no effect at all among the wealthiest, more wealth still gives more happiness among the rich. So, there is no satiation point for wealth.

4.4 What kind of assets result in the most happiness? What kind of debts reduce happiness most?

Once we know that wealth contributes to happiness, though not very much, the next question is whether all types of assets contribute to and all types of debts lower happiness in a similar way. One can choose to invest in financial assets and real assets and in both cases between variants of these. In the reverse case of going into debt there is a choice between secured and unsecured debt. How are such choices related to happiness?

Financial assets or real assets?

Table 1 shows that, apart from a few exceptions, both financial and real assets are positively associated with happiness. By comparing the effect sizes of (the few) findings on financial and real assets, it seems that financial assets matter more for happiness than real assets do (see Table 2). The number of findings on financial assets, however, is too little in order to allow a meaningful comparison.

Kinds of financial assets and debts

When one opts for financial assets, the next step is to choose a particular kind of holding. In the reverse case of going into debt there are also options to choose. How did such choices affect an individual's happiness?

Happier with safe savings. One can save in different ways: open a savings account at a bank, buy bonds or buy insurances. All these types of financial assets tend to go with greater happiness, whereas mixed effects are observed for the riskier kinds of savings, such as placing assets in stocks. Here, we excluded operating assets as they are both types of assets financial and real.

Happier with secured debts, but unhappier with unsecured debts. The relationship between happiness and secured debt is positive with the exception of four findings (Table 1). In the case of the bivariate correlation, this is not surprising as it neglects other important determinants of happiness. Hence, it is not possible to distinguish between the negative effects of being indebted and the positive effect, for example, of being a houseowner, and having mortgage. In this case, the joy of owning and living in a house is higher

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than the pain of being indebted. Even if controlled for other important determinants of happiness, the partial correlation is also positive in most cases. A possible reason for this could be that, for example, the monthly debt service for houseowners is lower than the rent they would have to pay if they wanted to rent a comparable house. Moreover, since the debts are secured, an individual can sell the house and get out of that debt if they have an unexpected job loss or an inability to service the monthly debt payment.

Three findings on happiness and unsecured debt shown in Table 1 suggest a clear negative relationship. Interestingly, microfinance loans as a specific type of unsecured debt are positively correlated to happiness, while other types of unsecured debt such as student loans are negatively correlated (see Table 6).

Kinds of real assets

When investing in real assets, there are also many options such as buying furniture, pieces of art, and jewelry. Findings on the relationship between having such assets and happiness are available only for two such options; (i) owning a house and (ii) owning a car. These findings reported in Table 5 reveals a positive relationship between happiness and real assets apart from a few exceptions indicating that owning a car is not always associated with greater happiness.

Homeowners happier. Empirical results regarding the relationship between happiness and home ownership are shown in Table 5. What do these findings tell us regarding our research question 2 regarding how different wealth components relate to happiness?

Among the cross-sectional findings summarized in Table 5 all the bivariate associations are positive. This pattern appears in comparisons of owners versus non-owners and of owners and renters, and suggest that home-ownership adds to happiness. Next to full house ownership, there are several kinds of partial ownership, such as time-limited ownership (redemption), joint ownership with others, usufruct and the right to use a house free of charge. The correlation with happiness of these ownership modalities has been addressed in two cross-sectional studies, the results of which are also summarized in Table 5 too. These findings suggest again that home-ownership of what-ever type tends to go with greater happiness.

Table 5 also shows the partial correlations where most of these are positive, which in turn suggests, too, that home ownership fosters happiness. In five cases, the partial correlation is negative. A closer look at these divergent findings reveals that in two studies satisfaction with several life domains has been considered in addition to the usual controls[4], which leads to endogeneity problems. In two cases different specifications of the model changed the picture: Rossi and Weber (1996) controlled for the socio-economic characteristics and in a study, among women, by Bucchcaniari (2011), family situation and average income in the neighborhood were additionally controlled for. These controls could be too severe and wash out the true effects of home-ownership on happiness. In particular, the control for income, as part of the effect of income on happiness is in what income allows one to buy, and among these expenses is a house. Eight

[4] Shu and Zhu (2009) and Mollenkopf *et al.* (2004)

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longitudinal findings are available on this topic and all findings suggest that a change to home-ownership is typically accompanied by a rise in happiness. Yet these studies do not show, however, what came first: the buying of a house or the rise in happiness.

Cars do not necessarily contribute to happiness. The bivariate correlation between happiness and ownership of a car is in most cases positive with two exceptions. Females in the UK, for example, tend to be unhappier when they have access to a car whenever they want, even though this correlation is not statistically significant. Another study investigated the relationship between happiness and price of the car one owns. The bivariate correlation and the partial correlation between happiness and a car in the lowest price category is found negative for the US. Other studies have also revealed a negative partial relationship between happiness and owning a car (see Table 5, column OLS).

Business. We find mixed results regarding the relationship between happiness and real assets used for business purposes. In this case, these assets are related to agriculture such as land ownership and livestock. Bivariate relationships indicate a positive relationship between happiness and the size of farm someone owns. However, the fact that one owns land is negatively related to happiness. Partial correlations indicate a positive relationship between happiness and both size of land and the amount of livestock someone holds. The one negative relationship that has been found holds for a subpopulation only; happiness is predicted to be lower if people migrate from Bangladesh to the UK.

4.5 Do the effects of wealth on happiness differ across places and people?

Now we will have a look at the relationship between happiness and net wealth, separately for assets and debt among different nations and populations.

Similar across nations

Among all nations, net wealth is positively correlated with happiness apart from a negative partial correlation for China and the US, respectively (see Table 1). Moreover, in most nations a positive relationship has been observed between assets and happiness (see Table 7). One finding suggests a negative relationship in Australia once satisfaction with wealth is controlled for. The same is true for a study among the general public in China, Germany and the UK. The coefficient for being a homeowner becomes negative, again, once satisfaction for several life domains is controlled for. One study considers rural-urban migrants in China, where financial assets in most specifications are negatively related to subjective well-being, however, this finding is not explained by the authors. Interestingly, the number of cars, or the value of the cars a household owns, is in most cases negatively related to subjective well-being, irrespective of the country where this issue has been explored. If you look at Table 8 debt is mostly negatively related to subjective well-being apart from Argentina (microfinance loan) and Italy (mortgage). Interestingly, the relationship between subjective well-being and debt is often positive in China.

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Similar across populations

Among all populations, net wealth is also positively correlated with happiness apart from a negative relationship for individuals living in rural China and elderly living in the US (see Table 1 findings for net wealth). The (few) available splits made by populations are presented in Table 9. Of the 18 findings on the relationship between happiness and assets, five are negative. Among those, negative relationships have been found for females, elderly, migrants as well as rural population. We find mixed results for the relationship between subjective well-being and debt. Four findings indicate a positive relationship among urban populations. Three findings suggest a negative relationship among younger people, rural as well as urban populations too, whereas in three findings a different specification of the model changed the picture. As the findings, however, do not show a consistent difference in the effects of assets on subjective well-being between these different populations, no conclusion can be drawn.

4.6 Do the effects of wealth differ across components of happiness? Does it make us feel better or just more contented?

We distinguish the different measures of happiness described in Subsection 2.1 in Table 10. When we look at the bivariate correlations in the first column it seems that overall happiness is more affected by wealth than affective happiness or a mixed measure of happiness, which fits the finding by Kainulainen *et al.* (2018) that finances relate more to the cognitive component of happiness than to its affective component. When we look at the partial correlation, we did not find big differences between the effects of wealth on overall or affective happiness, but the data we have is insufficient to allow us to draw definite conclusions.

5 DISCUSSION

5.1 What we know now

The aim of this review was to see how wealth affects happiness, to provide people with a basis for making informed choices with respect to surplus income. Are we any wiser now? The available findings show that wealthy people are typically happier than non-wealthy people and that at least part of this difference is due to a causal effect of wealth on happiness. Some of the findings support the hypothesis of diminishing marginal utility of wealth. The findings also show that being in debt typically reduces happiness, having unsecured debts in particular. Debt made for investment in a business (micro-credit) or a house (mortgage) work out positively on happiness.

5.2 What we do not know yet

Though we know that wealth adds to happiness, we do not know yet whether saving adds more to happiness than spending. The cricket may still be happier than the ant. We also do not know what the best way to build wealth is, to invest in financial assets or to buy real assets. When we opt for investing in real assets, we know that investing in a house will probably add more to our happiness than buying a car, but we do not know how other investment will work out on our happiness, such as buying art or jewelry.

Our knowledge of what works best for whom is quite limited as yet, although the available data do not show much difference in bivariate relations across nations and social categories, there may be more differences when it comes to causal effect and when more contextual variables are considered. If one wants to know how a financial choice has worked out in the past on the happiness of similar people, these people should not only be similar with respect to nation of residence and their socio-demographics such as age and gender, but also comparable with respect to personality and values. So far, the data can only inform us about single similarities, such as age or gender, while meaningful comparison requires that data is available on the happiness of people with whom we share multiple similarities.

5.3 Lines for further research

To get a better view on causality we need follow-up studies and among these should be studies that assess the effects of externally induced changes in wealth, such as inheritances or random financial mishap. To get a view on the long-term consequences of financial choices, these longitudinal studies should cover many years, preferably life-times. To enable comparison between the effects of saving and spending on happiness, these studies should cover both of these aspects of wealth. In order to allow a view on how financial choices have worked out on the happiness of similar people, future studies should be sufficiently large to allow splits by different types of people.

Much of these requirements can be met adding questions on wealth and consumption to running panel studies such as the Australian HILDA, the British Understanding Society Survey and the German Socio-Economic Panel (GSOEP), all of which already include some measures of wealth, one or the other. Even better would be the start of a more focused large-scale panel study on the long-term effects of private financial choices. The cost will be a fraction of what the financial industry spends today on advertising. As things are, some of the required information will become available within the growing stream of empirical happiness research, particularly in the new field of happiness economics. Periodical synthesis of this data will be helpful, in particular when building on the foundations laid down in this chapter.

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5.4 Sponsors of this research

This research is of interest to citizens who have surplus money and seek solid information about ways to use that money, with an eye on probable effects on their future happiness. As individuals, these citizens cannot do this type of research, so their information needs must be met by organizations. Which organizations might support this research? We see four ‘parties’ that could be involved. First, the scientific sector, which produced most of the above presented research findings. This party has an interest in pursuing this research topic, but is typically short of money. Second, the financial advice sector, which includes consumer unions and associations of professional financial advisors. These parties are in a good position to diffuse gathered information, but are less able to pay for the gathering of it. Third, providers of financial services to consumers, such as banks and life-insurance companies. These parties have the required funds, but are not always interested in revealing the real effects of products on the happiness of their customers. Fourth, the political sector, where interest in happiness is rising and helping citizens to make informed choices is an acceptable way to raise levels of happiness. Politicians can allocate funds to do the required research and can join forces with the other institutional stakeholders.

6 CONCLUSION

The available research findings on the relationship between wealth and happiness provide some clues for making informed choices on how to use one’s surplus money. Wealth adds to happiness, in particular among the elderly. The effect is small however, and subject to declining marginal utility. Safe investments in savings or in a house of one’s own tend to yield the most happiness. The available data do not inform us about the best ratio of saving and spending and only allow us a first glance at what financial choices might work out best for what kind of people.

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APPENDIX A: TERMS FOR RESEARCH TECHNIQUES USED IN THE HEADER OF THE TABLES

Research design

- Over-time correlation: cross-sectional data used; analysis of data from a population at a specific point in time
- Over-time correlation: longitudinal data used; repeated observations of the same variables over certain period of time

Statistical analysis

- Bivariate: correlation between two variables (wealth and happiness)
- Partial: correlation as a result of a multi-variate analysis
- OLS: Ordinary Least Square regression
- OPL: Ordered Probit or Ordered Logit regression
- IV: Instrumental Variable Analysis

APPENDIX B: MEANING OF SIGNS USED IN TABLES

+ positive association, statistically significant

+ positive association, not statistically significant

0 direction of association not reported

– negative association, statistically significant

– negative association, not statistically significant

+/− positive and negative correlations obtained with different sets of control variables

/ linear positive relationship

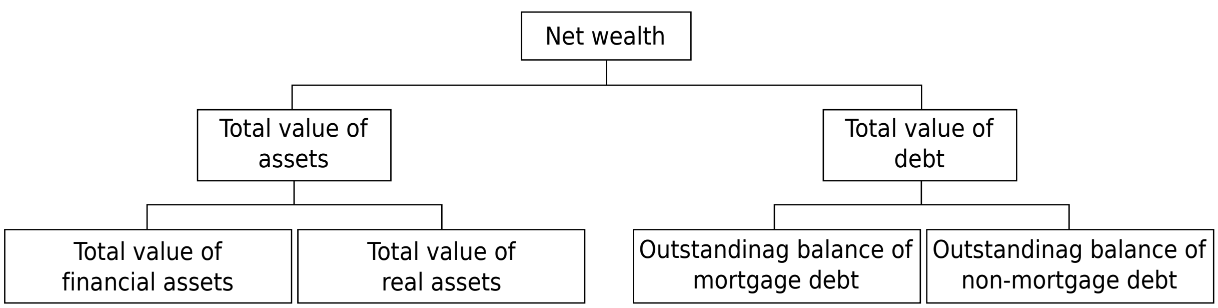
⌈ curvilinear shape, pattern of diminishing utility

C > A association of wealth with cognitive component of happiness stronger than with affective component

O > A association of wealth with overall happiness stronger than with affective component of happiness

O > M association of wealth with overall happiness stronger than with mixed measure of happiness

Figure 1: Wealth and its components



Source: Jantsch and Veenhoven (2019).

Figure 2: Start page of the World Database of Happiness: structure of the findings archive

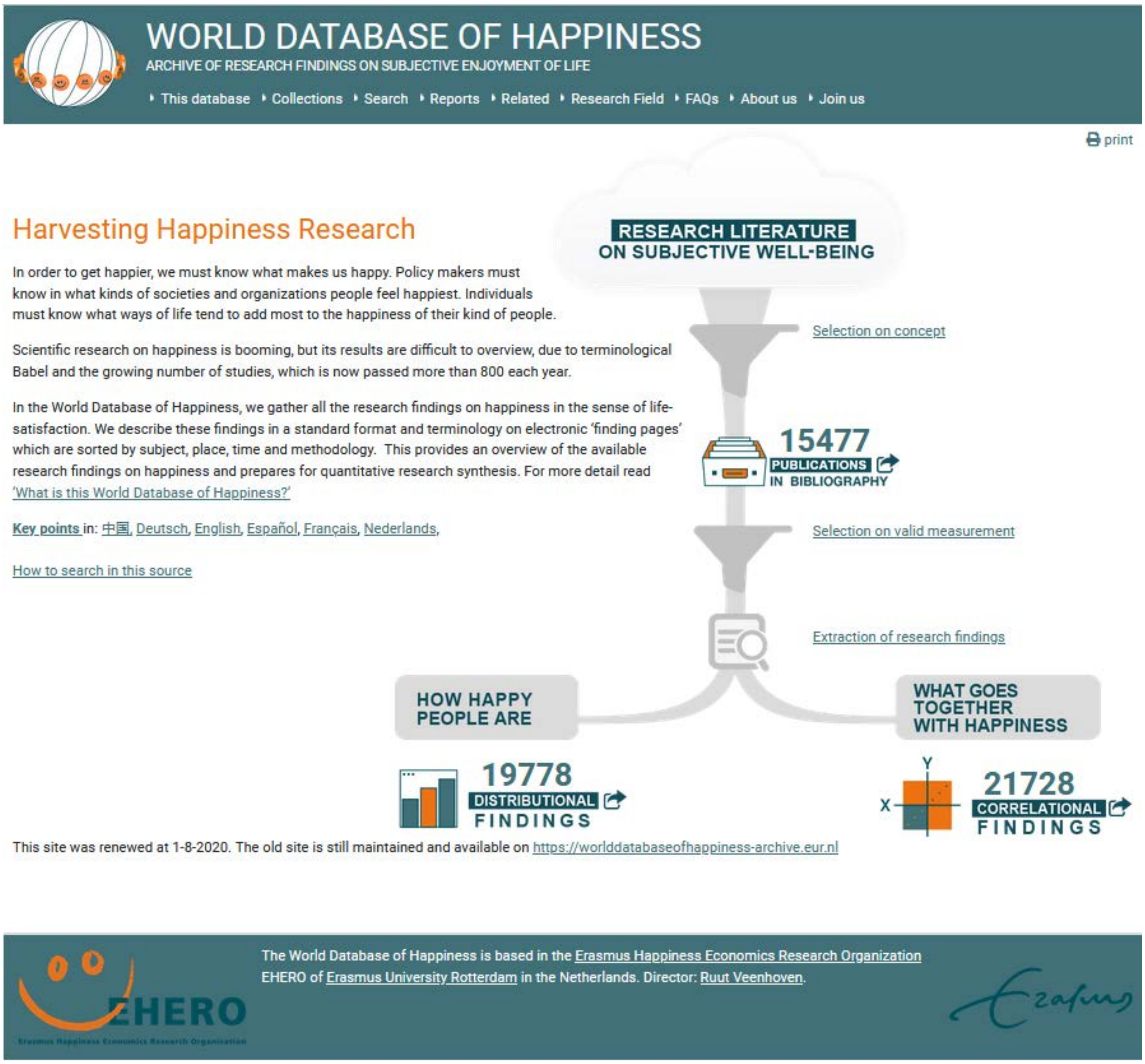
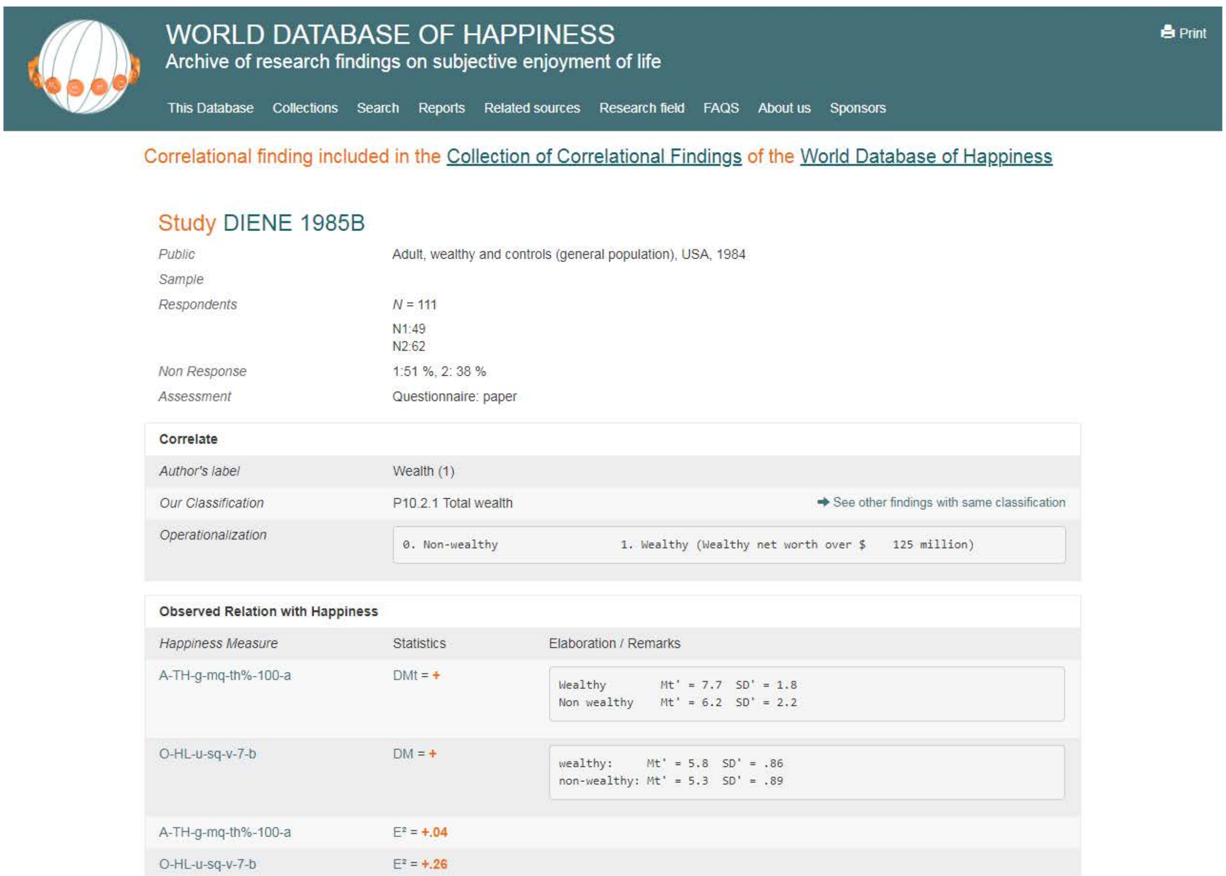


Figure 3: Example of a finding page in the World Database of Happiness


WORLD DATABASE OF HAPPINESS

Archive of research findings on subjective enjoyment of life

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Correlational finding included in the Collection of Correlational Findings of the World Database of Happiness

Study DIENE 1985B

Public	Adult, wealthy and controls (general population), USA, 1984
Sample	
Respondents	*N* = 111 N1:49 N2:62
Non Response	1:51 %, 2: 38 %
Assessment	Questionnaire: paper

Correlate

Author's label	Wealth (1)	
Our Classification	P10.2.1 Total wealth	See other findings with same classification
Operationalization	0. Non-wealthy 1. Wealthy (Wealthy net worth over $ 125 million)	

Observed Relation with Happiness

Happiness Measure	Statistics	Elaboration / Remarks
A-TH-g-mq-th%-100-a	DMt = +	Wealthy Mt' = 7.7 SD' = 1.8 Non wealthy Mt' = 6.2 SD' = 2.2
O-HL-u-sq-v-7-b	DM = +	wealthy: Mt' = 5.8 SD' = .86 non-wealthy: Mt' = 5.3 SD' = .89
A-TH-g-mq-th%-100-a	E² = +.04	
O-HL-u-sq-v-7-b	E² = +.26	

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Table 1: 198 Research findings on subjective well-being and wealth: all findings

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Net wealth	+ + + + + +	+ + + + + + + +/−	+/− +	−		+ +	+ + −	
Total assets	+ + + +	+ + + + − + − + − + − + − + + +		+		+		
Financial assets	+ + + + + + + +/−	+ + + + + −	+ + +	+ +/−	+ +	+ +		
Real assets	+ + + + + + + + + + + + + + + + + + +/+ +/+ +/+ +/− +/− + + + + + + + + +	+ + + + + + + + + + + +/+ +/+ +/+ + + + + + + +/− +/− +/− +/− +/− +/− −/− − − − + − − + + + + +	+ + + +/+ +/+ + + +/− + − + +			+ + + + + + + + +	+	
Total debt	− − − − −	− − +/− + + − − + +		− +/−		−	−	
Secured debt		− + + + + + + + + +	− +			− −	+	
Unsecured debt	−	+	+			−	−	

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

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Table 2: Stem-and-leaf diagram: observed relationships between net wealth, total (financial and real) assets and subjective well-being

	Same-time correlation (cross-sectional)		Over-time correlation (longitudinal)	
	bivariate *r*	partial *beta*	bivariate *r*	partial *beta*
+0.3	**3 6**			
+0.2	**4 3 8**		6	**3 3 5**
+0.1	**3 4 4 9** *0* **1 7 6 0 0 1 2 2 2 2 2 4 4 5 5** 5 7 **8**	**2** 1 *8*	9	**2**
+0.0	*6* **7 7 7** 0 2 2 4 4 **5 5 5 6** 6 7 **7 7 7 7 7 7 7 8 8** 9 **9**	**0 5 6 8 8 9** 5 3 **7**		**6 7** 8
-0.0	3 *3*	1 *3 7*		
-0.1		*9* **4 7 3 7**		
-0.2		*3*		

Numbers link to online detail about this finding. Use control+click.
Beta's control individual characteristics and perceived health.
Colours of the numbers indicate: total wealth, total assets, financial assets, real assets
bold figures: statistically significant; *italics* figures: special public other than the general public (male/female or rural/urban); figures link to online detail about this finding.

Table 3: Stem-and-leaf diagram: observed relationships between total debt, secured and unsecured debt and subjective well-being

	Same-time correlation (cross-sectional)		Over-time correlation (longitudinal)	
	bivariate *r*	partial *beta*	bivariate *r*	partial *beta*
+0.3				
+0.2				
+0.1				
+0.0		*0 0 0 0 0 0* **1** *1 1 1* 2 5		
-0.0		*0 1 1* 2 **5**		**5** 0 **6**
-0.1	3			
-0.2	4 5			

Numbers link to online detail about this finding. Use control+click.
Beta's control individual characteristics and perceived health.
Colours of the numbers indicate: total debt, secured debt, unsecured debt
bold figures: statistically significant; *italics* figures: special public other than the general public (male/female or rural/urban)

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Table 4: 9 Research findings on happiness and wealth: Shape of the relationship

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Net wealth	⌈ ⌈ ⌈ ⌈ ⌈							
Total assets								
Financial assets	⌈							
Real assets	⌈							
Total debt	⌈							
Secured debt								
Unsecured debt								

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

Table 5: 98 Research findings on subjective well-being and asset components

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Financial assets								
Savings	+	+ +	+ + +	+/−		+ +		
Stocks, bonds		+		+/−				
Pension, life insurance		+		+/−				
Other financial assets	+ + + +	+ +				+		
Real assets								
Housing	+ + + + + + + + + + + +/+ +/+ + + +	+ + + + + + + + + +/+ +/+ +/+ + + + + + +/− +/− +/− − − + + +	+ + +/+ +/+ +			+ + + + + + + +		
Cars	+ + + + + +/+ +/+	+ + +/− +/− +/− −	+ +/−			+		
Business	+ − −	+	+ - +					
Other real assets	+		+					

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

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Table 6: 27 Research findings on subjective well-being and debt components

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Secured debt								
Mortgage		+ + −	− +	+		+ + + + + + −	+	
Business loan		+		+				
Unsecured Debt								
Student loan	−	−						
Microfinance loan		+	+					
Others (unspecified)	− − − − −	+/−		+/−				

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

Table 7: 151 Research findings on subjective well-being and assets: Split by nations

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Europe	+	+ +/+						
Latin America	+							
Australia	+ + + + + + +	+ + + + + +/−	+/+ +/+			+ + + + +		
China		+ + + + + + + + +/− −	+/−	+ −				
Germany	+ +/+	+ + + + + + + + + + −	+ + + +	+/−		+ + + +	+	
The Netherlands	+ + + +	+ + −	+					
UK	+ + + + +/−	+ +				+		
US	+ + + + + + +/−	+ + + +/+ + + + +/− +/− +/− +/−	+ −			+ +		
Others	+ + + + + + + + + +/+ +/+ + + + + + + + + + + − −	+ + + + + + + + + + + +/− −/− - - - -	+ + + + + + + + + +/− -			+	+	

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

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Table 8: 32 Research findings on subjective well-being and debt: Split by nations

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Europe								
Australia	– – – –					–		
China		+ +/– –		+/– +/–		+ + + + + + –		
Germany		+/+					–	
The Netherlands								
UK								
US	–	–						
Others	–	–/– +/+ + +	+ – +					

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

Table 9: 70 Research findings on subjective well-being and net wealth: split by populations

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Net wealth								
Female/**M**ale		+F +M						
Rural/**U**rban		+R	+/–R	–R				
Young/**M**id/**O**ld	+O +O	+O +M **+O** **+O** +O +O +O +O +O +O +O **–O** **–O** **–O** –O –O –O	+O +O			+O	+O	
Assets								
Female/**M**ale	+F –F +M	+/–F						
Rural/**U**rban	–R –R	+U +U +R +R +R –R	+/–U +R	+U				
Young/**M**id/**O**ld	+M	+/+O +O –O –O	+Y +O					
Migrants		+ –						
Debt								
Female/**M**ale						+F +M		
Rural/**U**rban		+U +/–R –U		+/–U +/–R		+U +U +U –R		
Young/**M**id/**O**ld		–/–**O** +/+O +/+O	–Y					

Methods mentioned in the header of this table are explained in Appendix A. Signs used in the cells are explained in Appendix B.

Table 10: 12 Research findings on happiness and wealth split by measures of happiness

	Same-time correlation (cross-sectional)				Over-time correlation (longitudinal)			
	bivariate	partial			bivariate	partial		
		OLS	OPL	IV		OLS	OPL	IV
Net wealth	O>M O>M							
Total assets								
Financial assets								
Real assets	O>A O>A O>A	O=A O=A C=O=M	O=M O=M					
Total debt	O>M O>M							
Secured debt								
Unsecured debt								

O = Overall happiness, A = Affect, C = Contentment, M = mixed measure.

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Features of Consulting Services for the Formation of Key Indicators of Economic Security of Entrepreneurial Activity

By Vladislav Bessarabov
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Abstract- The article develops a scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity in the system of consulting services, which is distinguished by a clear and consistent study of the stages of its implementation in the context of their target and practical orientation, based on a matrix for comparing the causes and signals of threats to economic security in their areas. occurrence for its complex diagnostics. The purpose of the article is achieved through the consistent application of the following research methods: observation, generalization, comparison - to analyze and justify threats to the economic security of entrepreneurial activity; abstract-logical analysis - to highlight the forms of consulting in the field of economic security of entrepreneurial activity; modeling - to substantiate the structure and content of the proposed approach to the formation of key indicators of the economic security of entrepreneurial activity.

Keywords: threats to economic security; indicators of economic security; signals of threats to economic security.

GJHSS-E Classification: DDC Code: 621.38928 LCC Code: TH9737

FEATURESOFCONSULTINGSERVICESFORTHEFORMATIONOFKEYINDICATORSOFECONOMICSECURITYOFENTREPRENEURIALACTIVITY

Strictly as per the compliance and regulations of:

Features of Consulting Services for the Formation of Key Indicators of Economic Security of Entrepreneurial Activity

Vladislav Bessarabov

Abstract- The article develops a scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity in the system of consulting services, which is distinguished by a clear and consistent study of the stages of its implementation in the context of their target and practical orientation, based on a matrix for comparing the causes and signals of threats to economic security in their areas. occurrence for its complex diagnostics. The purpose of the article is achieved through the consistent application of the following research methods: observation, generalization, comparison - to analyze and justify threats to the economic security of entrepreneurial activity; abstract-logical analysis - to highlight the forms of consulting in the field of economic security of entrepreneurial activity; modeling - to substantiate the structure and content of the proposed approach to the formation of key indicators of the economic security of entrepreneurial activity.

Keywords: threats to economic security; indicators of economic security; signals of threats to economic security.

I. Introduction

The development of entrepreneurial activity is accompanied by the complication of economic ties, a significant number of which, on the one hand, indicates the possibility of income growth, and, on the other hand, the inevitability of the emergence and development of threats to economic security. At the same time, the difficulty of identifying such threats, and even more so their correct assessment, is due to the fact that they, as a rule, are not obvious, which, in turn, leads to the need for maximum attention to their signals and the corresponding indicators of economic security.

It is obvious that any threats to economic security inflict financial losses on business entities or lead to the loss of assets, along with reputational losses (decreased image in the eyes of the public). Whatever the consequences of the "actions" of threats to economic security, they are always preceded by certain signals, the interpretation of which should be the basis for the formation of appropriate indicators. However, the solution to the problem of diagnosing the economic security of entrepreneurial activity cannot be reduced only to the formation of the structure of such indicators and consideration of the possibility of their relationship.

Here, it is important to understand that the approach to the formation of key indicators of the economic security of entrepreneurial activity acts as a link between distinguishable consulting services in the area under study, based on the forms of their provision. It is on the basis of the analysis of certain indicators that it is possible to draw a conclusion about the level of economic security of the customer of services, the impact of certain threats on the efficiency of his activities and, based on the results obtained, develop a list of measures aimed at solving existing problems.

II. Research Results

The main consulting services in the field of economic security in the context of consulting forms and the logic of developing an approach to the formation of key indicators

The fundamental point for further research is the interpretation of our earlier thesis that the target orientation of the researched consulting services is associated with the identification, assessment, counteraction to threats to the economic security of business activities based on the development of information, organizational, methodological, institutional support. It is difficult to argue with the fact that the basis for the formation of at least these types of provision of consulting services should be based on the direction of their provision through the prism of consulting forms. This also requires an understanding of the information needs for the implementation of basic consulting services in the field of economic security, which are presented in table 1 in the context of consulting forms.

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Table 1: Basic Consulting Services in the Field of Economic Security in the Context of Consulting Forms

Form of consulting	Basic consulting services	Information needs
Management consulting	Development of concepts of economic security, incl. within the framework of the enterprise development strategy; analysis of existing and potential threats to economic security, as well as the development of recommendations to counter them; development of an integrated economic security management system	Information about the directions of activity, the development strategy of the enterprise (including missions, tasks, etc.), the distribution of job responsibilities, the organizational structure of the enterprise, analytical information about the main performance indicators.
Project consulting	Development of internal documents related to economic security; development and implementation of measures regulating the process of ensuring economic security; development of recommendations for solving specific problems of ensuring economic security with the help of individual projects and programs;	Information on the dynamics and rates of change in indicators for individual areas of activity, supported by a description of already implemented, as well as planned management decisions, indicating quantitative and qualitative results (economic, social effect).
Educational consulting	organizing and conducting training events of various formats (lectures, trainings, seminars, round tables, etc.); publication of educational materials (analytical reports, guidelines, etc.); development of cooperation in the field of education with other organizations and institutions.	Information about the level of knowledge of the target audience of the theoretical and methodological foundations for ensuring the economic security of entrepreneurial activity, as well as modern and effective methodology of the educational process.

Source: author's development

It is obvious that in order to obtain or form the information necessary for the implementation of consulting services (table 1), the scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity is important. Its development, in our opinion, should include:

1) Determination of the most similar basic theories in meaning (along with theories of industrial markets), consideration of the causes and consequences of the emergence of threats to economic security within which will create the necessary basis for their clear identification;
2) Substantiation and necessary concretization (classification) of threats to economic security, which will be preceded by an essential characteristic of their features in modern conditions;
3) Structural and content content of key indicators of economic security of entrepreneurial activity, which will confirm the importance of the developed approach for consulting services.

Theories that reveal the essence of threats to the economic security of entrepreneurial activity

In our opinion, in order to determine threats to the economic security of entrepreneurial activity (including by areas of occurrence), as well as their signals, it is first of all necessary to consider their causes and consequences. At the same time, the logic of the study, which combines theory and methodology at each of its stages, requires consideration, first of all, of the theoretical foundations of the root causes and consequences of threats to the economic security of entrepreneurial activity.

Most closely the essence of threats to the economic security of business activities reflect the provisions of the theories of catastrophes, conflicts and risks. Without aiming at a detailed consideration of the provisions of these theories, we will indicate their main features that are of interest for further research.

The catastrophe theory is used to study and predict the instability of any systems, since its provisions make it possible to assess the current state of the system (entrepreneurial entity) and determine the equilibrium parameters (threat signals and indicators of economic security). According to studies (Klenin, 2016; Oliva, 1991; Tugui, 2009; Zeeman, 1976), a jump-like transition of a system from one stationary state to another with a monotonous change in one or several parameters is called a catastrophe, and a qualitative change in an object, with a slight transformation of parameters, is called a bifurcation.

In the context of our study, it is legitimate to believe that a disaster is the inability of a business entity (system) to counteract threats to economic security using the available signals and indicators. That is, if the business structure is not able to diagnose economic security, then we should talk about its instability.

In other words, the very threat to economic security will be a catastrophe, which will first lead to financial or other losses (bifurcation), and in the future - to the termination of the business entity. So, in order to prevent this (we are talking about a catastrophe and bifurcation), it is necessary to clearly identify the chains of "cause-effect", "cause-signal-indicator" and on their basis it will be possible to identify and assess the threats to the economic security of entrepreneurial activity with a high degree of reliability. activities.

When considering these chains, it is impossible to avoid conflicts of interest that arise both in the process of diagnosing economic security and in the course of ensuring it. Interpreting the main provisions of the theory of conflicts in the plane of entrepreneurial activity (Alekseev, 2002; Danelyan, 2010; Commons, 2012) and the problems of our study, we can conclude that if an enterprise is able to diagnose economic security, overcoming a conflict of interests (for example, a possible fraudster and financially responsible person), then it will be able to provide it.

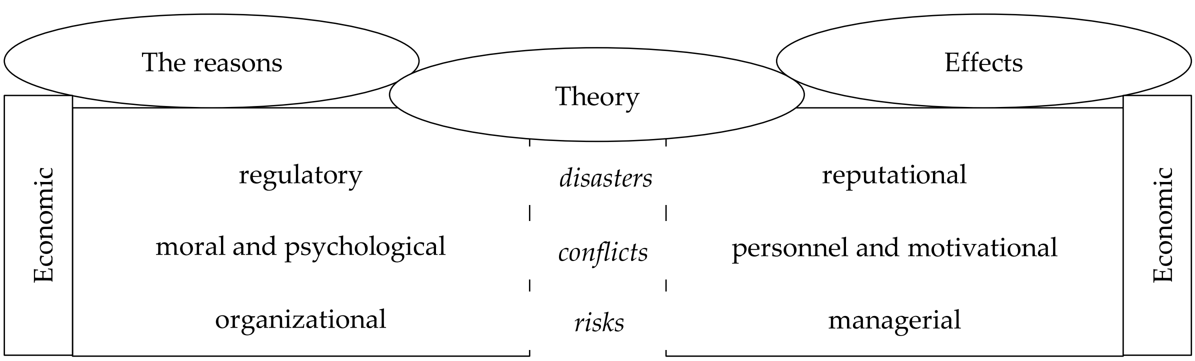
In the process of diagnosing economic security, the resolution or development of conflict situations inevitably occurs, that is, the coordination or disagreement of interests. At the same time, attention should be focused on the fact that we are talking about not just two opposite, but antagonistic interests of persons "violating" economic security (if any), and persons diagnosing or ensuring it. The interest of the former lies in taking possession of other people's property or acquiring the right to property through the implementation of fraudulent schemes (actions), and the latter in counteracting this with the help of appropriate methods.

In other words, the essence of diagnosing the economic security of entrepreneurial activity is reduced to the chain "cause-threat-consequence". It follows that a direct consequence of the conflict are threats to economic security for the assessment and identification of which, in each individual case (as well as for conflicts), it is necessary to use different methods that take into account their features and specifics as much as possible.

It is difficult to disagree with the fact that threats to economic security are accompanied by the risks of their detection or non-detection. The prism of economic science in the theory of risks (we note separately the works (Arrow, 1994; Vitlinsky, 2000; Yastremsky, 1992; Cherkasov, 1998) reduced it to uncertainty due to the lack of "... comprehensive information about the conditions for making decisions" (Yastremsky, 1992, 14).

In order to counteract anything, including threats to economic security, appropriate information is needed, the absence of which introduces the so-called uncertainty factor into the further activities of the business structure. In this context, we are talking not about information, but about its sources, to which we will include signals of threats to economic security and its indicators. So, the prospect of ensuring the economic security of entrepreneurial activity should be opened by understanding the chain "cause-uncertainty-signal-indicator", which underlies its effective diagnostics.

Given the above, it should be concluded that the process of diagnosing economic security depends on the causes of its threats, the level of detail of their signals and indicators, and understanding of their consequences. In other words, such a diagnosis boils down to a thesis: from the causes of threats to consequences through signals and indicators. At the same time, the provisions of each of the theories discussed above contribute to the causes and consequences of threats to the economic security of business activities, which is schematically shown in figure 1.



Source: compiled by the author

Figure 1: Causes and Consequences of Threats to the Economic Security of Business Activities According to Theories Disasters, Conflicts, Risks

The cause-and-effect relationship of threats to economic security in the context of theories of catastrophes, conflicts and risks is based solely on economic reasons (the desire to obtain economic benefits or other benefits) and consequences (deterioration of the economic, material and technical condition of the enterprise).

The economic reasons for the emergence of threats to the economic security of entrepreneurial activity also determine other derivatives of them:

- regulatory and legal (imperfection of domestic legislation in ensuring the economic security of entrepreneurial activity; lack of regulatory documents in business structures regarding economic security, etc.);
- moral and psychological (the desire for quick profit; lack of respect for the head of the structural unit or the business structure as a whole; the psychological propensity of individual employees to fraud, etc.);
- organizational (conclusion of risky transactions associated with a one-time receipt of a large income; reduced confidentiality of information about the personal data of employees; inadequate level of identification and assessment of threats to economic security, etc.).
- In turn, along with the obvious economic consequences of threats to the economic security of entrepreneurial activity, the following should be highlighted:
- reputational (decreasing the image of a business entity, management personnel, individual employees for stakeholders, etc.);
- personnel and motivational (decreased motivation of employees; the need to improve the skills of personnel; a decrease in professionalism due to a forced change of personnel, etc.);
- managerial (improvement of the organizational structure; unfavorable creative environment; urgent need to promptly search for new methods of ensuring economic security; adjustment and adaptation of job responsibilities of individual employees, etc.).

The identified causes and consequences of threats to the economic security of business activity, according to the theories of catastrophes, conflicts, risks, allow us to assert that the process of diagnosing it is a complex and multifaceted problem that often goes beyond the scope of economic science (and jurisprudence). This is also due to the fact that the range of threats to economic security in modern conditions is extremely wide. The key classification feature of threats to economic security, as previously established, is the scope of their occurrence.

Classification of threats to the economic security of business activities

In the economic sense, any threat is one of the elements of the sequential chain "security-threat-danger-loss". Consequently, it is legitimate to consider danger and loss as a form of manifestation of a threat, which, ultimately, affects the result of an activity. The correctness of this understanding is confirmed by the explanatory dictionary of the modern Russian language, in which the threat is understood as "the possibility of something unpleasant" (Ushakov, 2013, 711).

Such a simplified understanding largely determines the direction of the thoughts of scientists who understand threats to economic security as:

- the most specific and immediate form of danger or a set of conditions and factors that create a danger to the interests of various subjects (Oleinikov, 1997);
- the real possibility of the influence of an action of an intentional or unintentional nature that violates the stability of the enterprise, causing material and moral harm, which leads to deviations from the strategy (Reverchuk, 2004);
- a potential or actual action, process or phenomenon that can disrupt the stability of the enterprise and its development or lead to the termination of activities (Arefieva & Kuzenko, 2005);
- a set of conditions and factors that create a threat to the vital interests of the enterprise, complicate or make it impossible to realize economic interests (Gorak, 2015);
- endogenous and exogenous shocks of economic or political origin that can cause destabilization of the national or international economic system (Afontsev, 2001).

The most characteristic definitions of threats to economic security presented above indicate that they are the cause of danger. Accordingly, a threat in its essence is a potential opportunity to obtain a negative economic result arising from destabilizing factors of the internal and external environment. However, we note that a threat may not always be a direct cause of a negative economic result, but indirectly leads to it. Thus, a decrease in the image of a business entity in the eyes of the public is essentially a threat to its economic security, as it can lead to a decrease in the volume of activities and staff turnover, which will ultimately affect economic results.

In other words, from a practical point of view, it should be understood that the threats and their negative consequences for both business entities and state bodies of society are extremely diverse, which is explained by a number of reasons (for example, a constant lack of resources, the inability to reliably predict socio-economic and political changes in factors of the internal and external environment, etc.).

At the same time, threats to the economic security of entrepreneurial activity exist both at the level of individual enterprises (micro level) and at the level of the national economy (macro level). Taking into account the scope of threats to the economic security of entrepreneurial activity, in our opinion, their totality can be aggregated into 5 groups, which are presented in figure 2: political and legal, financial, intellectual and personnel, technical and technological, information and digital.

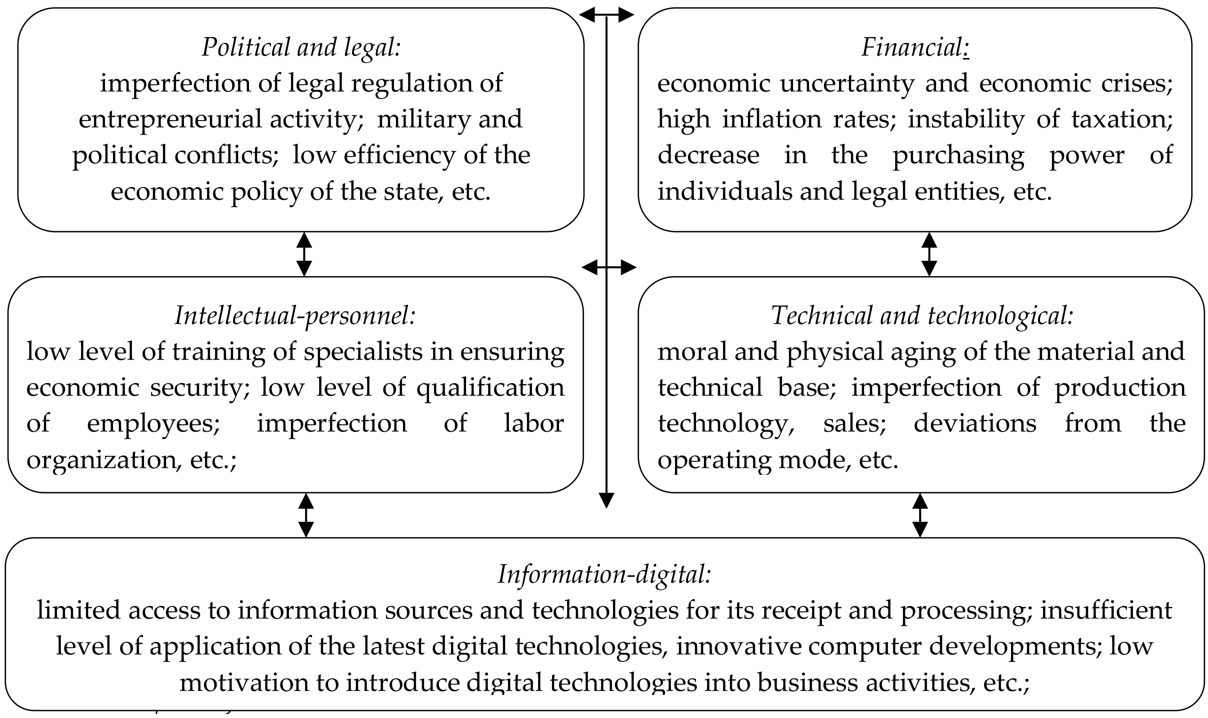


Figure 2: Threats to the Economic Security of Entrepreneurial Activity

Political and legal threats to the economic security of entrepreneurial activity are associated exclusively with the legislative plane of its regulation, which, on the one hand, can be a reaction to international conflicts (including military ones), and on the other hand, reflects the vector of development of state economic policy, creating a framework and restrictions.

Financial threats to economic security are the main ones, since their influence directly affects the volume of financial resources, which largely determines the development of entrepreneurial activity in general.

Intellectual and personnel threats to the economic security of entrepreneurial activity are associated with the activities of employees of the enterprise. At the same time, personnel threats directly relate to the organization of labor and the interaction of workers with each other, and intellectual threats are associated with the efficiency and quality of their performance of their duties, depending on the level of qualification.

The consequence of the imperfection of the technological process, violation of the cyclical production, non-compliance of products, goods, works and services with certain standards are technical and technological threats to the economic security of entrepreneurial activity.

In modern conditions, information and digital threats to economic security are becoming important, which manifest themselves not only in limited access to information (both official and unofficial), but also in violation of its confidentiality and content with the help of modern technologies. It should be specially emphasized that the use of digital technologies in entrepreneurial activity provides an opportunity to increase the arrays of analyzed information for the enterprise of management decisions, and, consequently, to constantly increase the scale of entrepreneurial activity.

The structure and content of the scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity in the system of consulting services

So, the approach presented below is based on the implementation of a series of sequential actions of the management of a business entity (consulting firm / individual consultant), which will allow the formation and adaptation of economic security indicators to the specifics of their activities, as well as ensure their targeted identification and, as a result, generate reliable information for making managerial decisions to neutralize threats.

Given the above, the scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity is implemented through clearly defined stages, alternating in a logical sequence with a certain amount of work on each of them.

The first stage is monitoring threats to economic security. At this stage, it is necessary to analyze the business processes of the enterprise structure and identify bottlenecks (operations, documents, etc.) that most contribute to the emergence of threats to economic security. Based on the results of monitoring, a list of threats to economic security in the context of areas of occurrence should be formed.

The second stage is modeling possible threats to economic security, determining their causes and consequences. The practical implementation of this stage should be reflected in the description of specific threats to economic security, indicating the areas of occurrence, subjects, causes and their consequences.

The third stage is the direct formation of key indicators of economic security. The implementation of the stage is associated with the formation of a system of indicators (with threshold values, if possible) of economic security in those areas of threats that can be quantified. For other indicators, an abstract-logical approach should be implemented in combination with experience.

The fourth stage is the introduction of key indicators of the economic security of entrepreneurial activity in the process (concept) of its diagnostics. The stage involves fixing the list of indicators of economic security, as well as the entire scope of work with them in regulatory documents (standards, guidelines, etc.).

The fifth stage is the assessment of changes and the study of indicators of the economic security of entrepreneurial activity over time. The specificity of this stage lies in the fact that tracking the dynamics of indicators should occur by comparing current results with the results of previous periods with possible extrapolation into the future.

The sixth stage is monitoring and reporting. The purpose of the stage is to draw up the necessary reporting on indicators of the economic security of entrepreneurial activity. This stage involves the formation of tables, analytical notes on changes in the signals of the emergence of threats to indicators of the economic security of entrepreneurial activity. It should be noted that documenting such signals and indicators, fixing deviations from them is the most universal way of generating information. At the same time, it should be understood that there can be no universal form of reporting, since it must meet the necessary requests of management, take into account the specifics of the business entity (for example (Bessarabov, 2021).

An example of an interim report form is presented in table 2 It should be emphasized that in foreign practice in such reports there is a use of color zones (red, yellow, green, etc.), which are convenient for drawing the attention of management to the most significant indicators of the economic security of entrepreneurial activity.

Table 2: Form of an Interim Report on Indicators of Economic Security of Entrepreneurial Activity

Signal	Change over period		Indicator	Indicator structure	Changing 1 structural element of the indicator		Changing … of the structural element of the indicator		Causes / consequences of changing the indicator
	+;-	%			+;-	%	+;-	%	
1	2	3	4	5	6	7	8	9	10
…	…	…	…	…	…	…	…	…	…

Source: author's development

Given the above, table 3 shows the target and practical orientation of the stages of the scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity in the system of consulting services.

Table 3: Stages of a Scientific and Methodological Approach to the Formation of Key Indicators of the Economic Security of Entrepreneurial Activity in the System of Consulting Services

Stage	Target orientation of the stage	Practical orientation of the stage
I stage Monitoring of Threats to Economic Security	Identification of business processes (operations) that are most at risk of threats to the economic security of the customer of consulting services	Formation of a list of existing and potential threats to the economic security of the customer of consulting services
II stage Modeling possible threats to economic security	Analysis of the causes and consequences of threats to the economic security of the customer of consulting services	Description of specific threats to economic security, indicating the causes of their occurrence and consequences for the customer of consulting services
III stage Formation of key indicators of economic security	Substantiation and adjustment of the structure, content of threat signals and indicators of economic security of the customer of consulting services	Formation of the structure of signals and a system of indicators (with threshold values, if possible) of economic security, taking into account the specifics of the customer of consulting services

Stage	Target orientation of the stage	Practical orientation of the stage
IV stage Introduction of key indicators of economic security	Adaptation of key indicators of economic security to the specifics of the business activity of the customer of consulting services	Fixing the list of indicators of economic security, as well as the entire necessary scope of work with them in the regulatory documents of the customer of consulting services
Stage V Assessing change and examining indicators over time	Tracking the dynamics of indicator deviations and analyzing the possibility of extrapolating their values into the future	Implementation of a logical procedure for comparing indicators, studying trends in their change
VI stage Monitoring and reporting	Drawing up the necessary reporting on threat signals and indicators of economic security of the customer of consulting services	Formation and analysis of tables (analytical reports) on deviations of key indicators of economic security of the customer of consulting services

Source: author's development

III. Conclusion

Thus, a scientific and methodological approach has been developed to the formation of key indicators of the economic security of entrepreneurial activity in the system of consulting services, the rationale for the logic of which is considered by comparing the causes and consequences of its threats by areas of occurrence, which are also reflected in the corresponding matrix. The implementation of the approach is aimed at identifying and assessing threats to the economic security of business activities, which form the basis of its diagnostics: from monitoring threats to compiling the necessary reporting forms based on the results of the implementation of key indicators of economic security. In turn, the target and practical orientation of the stages of the scientific and methodological approach to the formation of key indicators of the economic security of entrepreneurial activity predetermine the need to develop the concept of its diagnostics.

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Some Externalities Stemming from Mexico's Urban-Regional Imbalance: The Covid's Struggle in the Country's Center Region

By Octavio Luis-Pineda

Abstract- The unbalanced growth observed around major cities and regions in Mexico stemming mostly from the neoliberal strategy implemented by Mexico in the last forty years is manifested with great intensity in the CDMX megalopolis located in the central region, the most populated of Mexico's seven economic regions vid, Luis-Pineda, O.(Sep, 2021), which, although benefited by the economic boom of economic globalization, has inflicted enormous social and externalities to this region such as environmental costs such as air, soil pollution deterioration and myriad other socioeconomic effects on its population, generating as well a non-inclusive urban-regional development in the country, especially Mexico city´s macrocephalic growth in Mexico´s Center region, vid, Luis-Pineda, O. (feb, 2022).

Worthwhile mentioning are pulmonary affectations as well as other health problems on its inhabitants due to the giant human and industrial concentration on this region, as a consequence of pollution by greenhouse gases CO2 along with others toxic air pollutants which altogether increase people's proclivity to acquire lung cancer and various other diseases and make them more fragile vis-à-vis the pandemia. Explaining the severity of the lethality of this scourge among its major municipalities as around Mexico City' vicinity (CDMX) in the recent past.

Keywords: urban-regional imbalance, externalities, mexico's center-region, socioeconomic and environmental implications.

GJHSS-E Classification: DDC Code: 016.330973092 LCC Code: H31

SOMEEXTERNALITIESSTEMMINGFROMMEXICOSURBANREGIONALIMBALANCETHECOVIDSSTRUGGLEINTHECOUNTRYSCENTERREGION

Strictly as per the compliance and regulations of:

Some Externalities Stemming from Mexico's Urban-Regional Imbalance: The Covid's Struggle in the Country's Center Region

Algunas Externalidades Asociadas al Desequilibrio Regional-Urbano en México: El Combate del Covid en la Región Centro

Octavio Luis-Pineda

Abstract- The unbalanced growth observed around major cities and regions in Mexico stemming mostly from the neoliberal strategy implemented by Mexico in the last forty years is manifested with great intensity in the CDMX megalopolis located in the central region, the most populated of Mexico's seven economic regions vid, Luis-Pineda, O.(Sep, 2021), which, although benefited by the economic boom of economic globalization, has inflicted enormous social and externalities to this region such as environmental costs such as air, soil pollution deterioration and myriad other socioeconomic effects on its population, generating as well a non-inclusive urban-regional development in the country, especially Mexico city´s macrocephalic growth in Mexico´s Center region, vid, Luis-Pineda, O. (feb, 2022).

Worthwhile mentioning are pulmonary affectations as well as other health problems on its inhabitants due to the giant human and industrial concentration on this region, as a consequence of pollution by greenhouse gases CO2 along with others toxic air pollutants which altogether increase people's proclivity to acquire lung cancer and various other diseases and make them more fragile vis-à-vis the pandemia. Explaining the severity of the lethality of this scourge among its major municipalities as around Mexico City' vicinity (CDMX) in the recent past.

However, the background of these externalities lies in the economic model of social exclusion concomitant to the trade liberalization and the prevailing neoliberal strategy implemented by Mexico in the last decades vis-a-vis the acquiescence of a carefree and corrupted State that has neglected its legal and social responsibility to promote growth and the generation of the social basic satisfiers for most Mexican people such as employment, health, housing, education, and social security. This paper aims at show that the ruling government throughout the last decades was unable to promote not only the production of the aforementioned social basic satisfiers, particularly, sufficient public health services throughout Mexico and particularly in this region to meet its increasing population demand. But this strategy has also produced some other externalities such as regional-urban imbalances among the studied region and the rest of regions and municipalities or urban areas in Mexico. A phenomenon which is also reflected among Mexico's top 15 municipalities vid, Luis-Pineda, O. (sep.(a), 2021). A situation that has also undoubtedly affected the center region and contributed to exacerbating health problems such as the COVID-19 pandemic currently affecting not only Mexico and its regions but the world over.

Keywords: urban-regional imbalance, externalities, mexico's center-region, socioeconomic and environmental implications.

Resumen- El crecimiento desequilibrado manifiesto entre las principales urbes y regiones nacionales propiciado por la estrategia neoliberal instrumentada por México en los últimos cuarenta años, se manifiesta con suma intensidad en la megalópolis de la CDMX ubicada en la región centro, la más poblada de la siete regiones económicas del país , que aunque resultado beneficiada por la bonanza económica asociada a la apertura comercial ha propiciado igualmente enormes costos sociales y ambientales para esta región como deterioro y afectaciones sociales en la población de la misma.

Especialmente notorio resultan ser las afectaciones pulmonares y salud en general para sus habitantes por las enorme concentración humana e industrial y vehicular y contaminante concentración de gases de efecto invernadero (CO2) amen de otros gases nocivos en la atmósfera (consumo per cápita) y la proclividad de sus habitantes para adquirir cáncer pulmonar y diversos padecimientos y hacerlos más frágiles frente a la pandemia del COVID. Explicando así su alta letalidad entre los principales municipios conurbados de la CDMX en el pasado reciente. Particularmente de aquellos de más alta marginación social pero igualmente de alta concentración humana en todo México.Lo cual se aplica al caso de los municipios más pobres y sobrepoblados de la región centro, objeto de nuestro interés, como lo atestigua una investigación realizada por la Universidad de California, en San Franscisco, alguno de cuyos resultados emplearemos en este trabajo, vid, UCSF (24 mar,2021)

No obstante, en el trasfondo de estas externalidades subyace el modelo modelo económico de exclusión social asociado a la apertura comercial e instrumentación en México de una estrategia neoliberal aplicada por el país durante los últimos cuarenta años frente a la aquiescencia de un Estado omiso y corrupto quien ha soslayado históricamente su responsabilidad jurídica y social de propiciar crecimiento económico conjuntamente con los satisfactores básicos requeridos por la población como empleo, salud, vivienda, educación y seguridad social. Este trabajo busca demostrar que el Estado mexicano durante el periodo de análisis ha resultado incapaz de propiciar la generación de dichos satisfactores arriba referidos, particularmente los servicios de

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salud pública para una población creciente. Estrategia que igualmente ha propiciado indiscutiblemente diversas externalidades como la asimetría regional-urbana entre la región centro y otras regiones del país, y que ha contribuido en agudizar un problema coyuntural de alcance mundial como la pandemia que está experimentado esta region y el país así como el mundo entero en general.

Las afectaciones a la salud de la población de la region objeto antes aludidos, la han convertido presa fácil y más frágil frente a una pandemia como el COVID19. Situación que se explica por la severidad de la letalidad de dicho flagelo sanitario durante 2020-2021. Pues afecta especialmente a la población de los principales municipios conurbados de la CDMX en el pasado reciente, vid, Gobmx. ssalud (25 jul, 2021).

Palabras claves: desequilibrio urbano-regional, región centro de méxico, externalidades, implicaciones socioeconómicas y ambientales.

I. Introduccion

Dado lo amplio de esta temática y la brevedad del espacio para este análisis esbozaremos solamente algunos factores económicos, sociales y ambientales así como algunas externalidades que han exacerbado e inciden en la problemática del COVID19 en la región centro, especialmente alrededor de la CDMX y estado de México.Dos de las entidades de mayor concentración humana e industrial en el región y el país general. Formalmente la región centro está conformada por siete entidades federativas: CDMX, Estado de México, Querétaro, Guanajuato, Hidalgo, Tlaxcala y Puebla. Para este análisis echaremos mano de información oficial disponible complementada con elaboraciones propias a efecto de disponer de datos para el periodo 1980-2020e con base en información estadística proveniente del INEGI (Instituto Nacional de Estadística Geografía e Informática del gobierno mexicano).

II. Factores Economicos

Dentro de este ámbito revisaremos varios indicadores que inciden en la región centro, como (1) crecimiento económico y per cápita 2) generación empleo formal e informal y 3) inversión extranjera directa

Factor Econ (1): Crecimiento Economico en la Region Centro

Para este fin analizamos la evolución del producto interno bruto y su per cápita de las principales entidades federativas de la región centro para el periodo 1980-2020e. Como un elemento determinante para explicar la alta concentración humana e industrial en nuestra región de estudio. Para lo cual nos apoyamos en cifras del PIB y per cápita de las entidades de la region centro reportados en la Tabla 1.1 de abajo:

TABLA 1.1

PIB Y PIB p.c. REGION CENTRO

(1980-2020e)

REGION CENTRO/	PIB (md, USDlls.ctes.)					TMAC	PIB PC (Usdlls.Ctes.)						TMAC
ENTIDAD	1980	1990	2000	2010	2020	1980-2020	1980	1990	2000	2010	2020	#	1980-2020
CDMX	$ 47.4	$ 69.8	$ 102.7	$ 175.0	$ 222.2	3.93%	$ 5,948	$ 8,475	$ 11,931	$ 19,775	$ 24,515	#	3.60%
ESTADO DE MÉXICO	$ 31.1	$ 42.9	$ 59.2	$ 85.2	$ 112.9	3.27%	$ 9,268	$ 11,633	$ 14.60	$ 19.78	$ 23,010	#	2.30%
QUERÉTARO	$ 8.8	$ 11.4	$ 14.8	$ 17.9	$ 25.0	2.66%	$ 11,110	$ 11,311	$ 11,141	$ 10,647	$ 11,934	#	0.18%
GUANAJUATO	$ 9.1	$ 14.4	$ 22.7	$ 36.1	$ 56.5	4.67%	$ 2,664	$ 3,605	$ 4,860	$ 6,581	$ 8,933	#	3.07%
PUEBLA	$ 13.3	$ 17.6	$ 23.5	$ 32.7	$ 41.4	2.88%	$ 3,781	$ 4,278	$ 4,619	$ 5,657	$ 6,192	#	1.24%
MORELOS	$ 9.2	$ 10.0	$ 10.9	$ 12.3	$ 12.8	0.82%	$ 12,461	$ 10,975	$ 8,941	$ 8,689	$ 7,500	#	-1.26%
HIDALGO	$ 3.3	$ 5.4	$ 8.6	$ 14.5	$ 22.2	4.84%	$ 2,092	$ 2,844	$ 3,855	$ 5,435	$ 7,147	#	3.12%
TLAXCALA	$ 2.5	$ 3.3	$ 4.3	$ 6.2	$ 7.4	2.75%	$ 4,024	$ 4,299	$ 4,462	$ 5,265	$ 5,243	#	0.66%
Total regional	$ 124.8	$ 174.8	$ 246.6	$ 379.9	$ 500.3	3.60%	$ 6,418	$ 7,178	$ 8,052	$ 10,228	$ 11,809	#	1.59%

Fuente: Elaboraciones propias con datos del INEGI

De las cifras anteriores muestran claramente que la entidad con mayor producto resulta la CDMX seguido muy por abajo por el Estado de México. El peso específico PIB de cada uno resto de entidades resulta marginal respecto de las dos primeras entidades referidas. Respecto al per cápita de las entidades de la región, destaca que las dos entidades líderes rebasan con mucho al resto de entidades de la región.

Factor Econ (2): Generacion Del Empleo Formal e Informal en la Region Centro

Asociado al alto crecimiento observado en la región objeto, particularmente en la CDMX y Estado de México, durante el lapso estudiado, analizamos la evolución del empleo formal e nformal en esta región. Este último, consecuencia natural de la expulsión de gran parte de la mano de obra del sector formal de la economía regional frente a la incapacidad de ésta de absorber productivamente a su fuerza laboral como notamos de las cifras de empleo formal e informal reportados en la Tabla 1.2 que aparece enseguida:

TABLA 1.2												
EMPLEO FORMAL E INFORMAL REGION CENTRO (1980-2020e)												
REGION CENTRO/	EMPLEO FORMAL (millones personas)					TMAC	EMPLEO INFORMAL (millones per.)					TMAC
ENTIDAD	1980	1990	2000	2010	2020	1980-2020	1980	1990	2000	2010	2020	1980-2020
CDMX	2.125	2.305	2.501	2.771	2.943	0.82%	1.227	1.261	1.294	1.200	1.252	0.06%
ESTADO DE MÉXICO	1.819	2.377	3.106	4.252	5.303	2.71%	1.185	1.452	1.775	1.996	1.998	1.35%
QUERÉTARO	0.219	0.284	0.369	0.480	0.622	2.65%	0.194	0.213	0.229	0.219	1.177	-0.30%
GUANAJUATO	0.491	0.683	0.950	1.298	1.837	3.35%	0.663	0.738	0.800	0.819	0.623	-0.32%
PUEBLA	0.592	0.768	0.995	1.350	1.672	2.63%	0.776	0.877	0.981	0.982	0.982	0.58%
MORELOS	0.244	0.299	0.366	0.479	0.551	2.06%	0.209	0.233	0.257	0.282	0.254	0.50%
HIDALGO	0.211	0.293	0.407	0.607	0.783	3.33%	0.403	0.447	0.485	0.426	0.445	0.15%
TLAXCALA	0.117	0.159	0.215	0.278	0.396	3.10%	0.116	0.136	0.159	0.176	0.155	0.72%
Total regional	5.819	7.168	8.909	11.515	14.108	2.34%	4.774	5.357	5.980	6.099	5.886	0.52%
Fuente: Elaboraciones propias con datos del INEGI												

Notando claramente que la entidad de mayor producción de empleo resulta ser la entidad mexiquense, seguida por la CDMX. La contribución del empleo del resto de entidades resulta marginal. Aunque la producción de empleos formales en la región ha estimulado fuertemente la inmigración de mano de obra de otras regiones hacia esta región, y especialmente, hacia las dos entidades antes referidas. Generando así la expulsión del excedente laboral hacia el mercado informal, como se advierte en el cuadro anterior en las cifras de informalidad en el Estado de México y seguido por la CDMX, siendo la informalidad de menor dimensión en el resto de entidades de la región.

Factor Econ (3): Inversion Extranjera Directa en la Region

Elemento clave y factor de incuestionable importancia para explicar el dinámico crecimiento económica y alta concentración industrial en la misma, es la presencia y comportamiento de la inversión extranjera directa durante el periodo. Flujos de capital que han propiciado indiscutiblemente una mayor atracción de empresas hacia las diversas entidades integradas en la región pero igualmente de mano de obra proveniente de otras regiones económicas del país como el sur, sureste y golfo, etc. y que ha exacerbado la inmigración y concentración humana hacia esta región con la consecuente presión social sobre los recursos naturales y servicios públicos en los municipios conurbados a la CDMX y estado de México y sus principales entidades propiciando cinturones de miseria a su alrededor y un crecimiento desordenado y otras externalidades en los mismos. La información sobre la inversión extranjera directa (en USdls corrientes) durante el periodo de análisis se reproduce en la Tabla 1.3 de abajo:

TABLA 1.3						
INVERSIÓN EXTRANJERA DIRECTA REGION CENTRO (1980-2020e)						
REGION CENTRO/	IED (Inversión Extranjera Directa) (Millones USD corrientes)					TMAC
ENTIDAD	1980	1990	2000	2010	2020	1980-2020
CDMX	$ 861.2	$ 2,226.0	$ 5,318.3	$ 4,030.0	$ 5,228.8	4.61%
ESTADO DE MÉXICO	$ 28.9	$ 109.8	$ 1,402.9	$ 2,249.8	$ 1,768.7	10.83%
QUERÉTARO	$ 12.9	$ 10.1	$ 628.2	$ 847.9	$ 1,458.5	12.55%
GUANAJUATO	$ 70.0	$ 212.2	$ 1,312.2	$ 2,067.3	$ 5,400.2	11.48%
PUEBLA	$ 3.5	$ 13.5	$ 381.7	$ 784.1	$ 401.9	12.62%
MORELOS	$ 0.7	$ 178.8	$ 152.6	$ 199.4	$ 610.4	18.46%
HIDALGO	$ 0.7	$ 153.7	$ 49.4	$ 139.7	$ 369.3	16.80%
TLAXCALA	$ 5.6	$ 5.4	$ 56.0	$ 91.2	$ 209.2	9.49%
Total regional	$ 983.5	$ 2,909.5	$ 9,301.3	$10,409.4	$15,447.1	7.36%
Fuente: Elaboraciones propias con datos del INEGI						

Destaca que la entidad con mayor concentración de inversión extranjera en la región durante el lapso de estudio es la CDMX (que crece al 4.61%) seguido por Guanajuato (11.48%) y en tercero lugar por el estado de México (10,83%). El resto de entidades observan niveles de inversión muy por abajo de estas tres entidades mencionadas. Aunque la entidad con mayor crecimiento en el flujo de inversiones resulta ser Morelos (18%), seguido por Hidago (16%). Siendo el crecimiento del crecimiento de estas inversiones del más del 7% anual promedio. Resulta entonces explicable que la concentración industrial y humana en la región se geste alrededor de estas entidades y particularmente alrededor de las tres primeras entidades mencionadas aunque la CDMX y entidad mexiquense llevan de por sí la delantera por su saturación industrial y humana que explica estas inversiones busquen entidades apartadas de estas dos entidades para radicarse en ellas, es decir, más alejadas de la megalópolis de la CDMX como el caso de Guanajuato y Querétaro, por ejemplo.

III. Factores Sociales

Dentro de este ámbito analizamos solamente la evolución de la densidad de población durante el lapso de estudio como otro factor social determinante para la región objeto y explicar su proclividad para ser afectada particularmente por la pandemia del COVID19 especialmente alrededor de la CDMX y estado de México durante estos años.

Factor.Soc (1) Densidad Poblacional en Region Centro

Producto evidente de la fuerte atracción ejercida por el alto crecimiento económico en la región y la consecuente su alta generación de empleos en la misma, se explica una desmesurada concentración humana en CDMX y entidad mexiquense, durante las últimas décadas pero igualmente hacia otras entidades tradicionalmente con poca población como Querétaro, Guanajuato e Hidalgo. Mismas que ahora observan tasas de crecimiento por arriba del 3% como Guanajuato (3.4%) e Hidalgo (3.09%). Y para el caso de Querétaro manifiesta un crecimiento de casi 5% (4.73%) promedio annual. Confirmando nuestra hipótesis anterior de que el crecimiento de estas dos últimas entidades resultaban del éxodo industrial de las entidades líderes CDMX y entidad mexiquense hacia su periferia inmediata dentro de la propia región, como advertimos en las cifras de densidad poblacional del Tabla 2.0 que se muestra a continuación:

TABLA 2.0

DENSIDAD POBLACIONAL REGIÓN CENTRO

(1980 - 2020e)

REGION CENTRO/ ENTIDAD	(Habitantes/km2) 1980	1990	2000	2010	2020e	TMAC 1980 - 2020
CDMX	8876	8957	9039	9099	9204	0.09%
MÉXICO	4922	5152	5393	7004	5911	0.46%
QUERETARO	76	120	191	341	481	4.73%
GUANAJUATO	194	267	367	550	695	3.24%
PUEBLA	490	645	850	1106	1473	2.79%
MORELOS	729	871	1042	1235	1489	1.80%
HIDALGO	200	271	367	523	675	3.09%
TLAXCALA	439	532	645	791	947	1.94%
Total Regional	1991	2102	2237	2581	2609	0.74%

Fuente: Elaboraciones propias con datos de INEGI

Observando de las cifras arriba reportadas que la mayor concentración humana se localiza en la CDMX (9,200 hab/km2) seguida muy por abajo, por el estado de México (5,911 hab/km2). Pero quienes manifiestan tasas de crecimiento muy bajas, del 0.09% y 0.46%, respectivamente. El resto de entidades reportan poca concentración absoluta pero algunas manfiestan altas tasas de crecimiento como Querétaro, Guanajuato e Hidalgo quienes crecen a más del 3% promedio annual. Resultado del éxodo de industrial arriba mencionado. Reflejo de su rápido crecimiento durante el periodo. Como también explica el hecho de que aunque la dinámica de crecimiento de las dos entidades líderes resulta s pequeña y casi marginal, su dimensión absoluta y densidad poblacional rebasa con mucho al resto de sus entidades circunvecinas con las consecuencias ya mencionadas anteriormente.

IV. Factores Ambientales

En esta esta renglón examinamos dos indicadores ambientales básicos 1) producción de gases de efecto invernadero (CO2), 2) motorización en la región centro.

Factor Amb (1): Produccion Total Gases Co2 (P.C.)

Consecuencia de la alta concentración industrial y vehicular en la región objeto de análisis se explica la alta generación de gases CO2 en la misma. Aunque la CDMX y Tlaxcala y Estado de México, resultan las de mayor generación de C02 per cápita para finales del periodo (0.61), (0.57) y (0.48) millones de toneladas per cápita respectivamente, con tasas de crecimiento del 2.62%, 8.0% y 6.72%, respectivamente. El resto de entidades aunque reportan niveles moderados, aunque algunas muestran altas tasas de crecimiento durante el periodo como el caso de Hidalgo, y Guanajuato, y Querétaro durante el periodo de estudio. Como se notamos en la Tabla 3.1 siguiente:

TABLA 3.1 PRODUCCION TOTAL GASES (CO2) EN REGIÓN CENTRO (1980 - 2020e)						
REGION CENTRO/ ENTIDAD	PRODUCCION TOTAL (CO2) [Mill. Ton. P.C.]					TMAC
	1980	1990	2000	2010	2020e	1980 - 2020
CDMX	0.22	0.22	0.27	0.36	0.61	2.62%
MÉXICO	0.04	0.08	0.09	0.19	0.48	6.72%
QUERETARO	0.05	0.08	0.16	0.25	0.27	4.37%
GUANAJUATO	0.04	0.06	0.12	0.21	0.36	5.78%
PUEBLA	0.05	0.08	0.1	0.19	0.24	4.14%
MORELOS	0.06	0.09	0.09	0.17	0.15	2.47%
HIDALGO	0.04	0.05	0.15	0.29	0.29	5.32%
TLAXCALA	0.03	0.05	0.09	0.17	0.57	8.00%
Total Regional	0.51	0.73	1.07	1.84	2.97	4.59%
Fuente: Elaboraciones propias con datos de INEGI						

Huelga abundar respecto al caso Tlaxcala, entidad muy pequeña aledaña a la CDMX, quien ocupa el segundo lugar como generadora de CO2 per cápita luego de CDMX y en tercero por la entidad mexiquense. Su comportamiento resulta ser producto de una muy acelerada industrialización y consecuente alta dinámica de crecimiento industrial y mayor contaminación en la entidad en las últimas décadas y su espectacular crecimiento económico en el lapso de análisis. El resto de entidades, aunque tambien incrementan su generación de gases CO2, lo hacen a niveles menos espectaculares que la referida.

Factor Amb (2): Motorizacion en Region Centro

Consecuencia del imperativo de una mayor movilidad de parte de los habitantes de la región centro inherente a su mayor actividad económica y concentración humana se explican los altos niveles de motorización en ésta y el imperativo de sus habitantes y tráfico comercial por trasladarse de un punto a otro de la región, en particular entre CDMX y Estado de México, y sus entidades circunvecinas, propiciando así una mayor producción de CO2 en la región, como hemos comentado previamente. Con la idea de analizar el comportamiento de los niveles de motorización por cada entidad federativas de la región (vehículos por c/1000 habitantes) reproducimos aquí la Tabla 3.2

TABLA 3.2 MOTORIZACIÓN EN REGIÓN CENTRO (1980 - 2020e)						
REGION CENTRO/ ENTIDAD	(VEHICULOS / 1000 Habitantes)					TMAC
	1980	1990	2000	2010	2020e	1980 - 2020
CDMX	1870	1978	2512	3472	5970	2.94%
ESTADO DE MÉXICO	301	842	1211	2985	8993	8.87%
QUERETARO	42	92	231	459	622	6.95%
GUANAJUATO	139	255	592	1275	2443	7.42%
PUEBLA	184	355	523	1208	1768	5.83%
MORELOS	46	94	123	263	282	4.63%
HIDALGO	63	112	364	850	965	7.08%
TLAXCALA	18	43	97	212	878	10.24%
Total Regional	333	471	707	1340	2643	5.32%
Fuente: Elaboraciones propias con datos de INEGI						

Advertimos de las cifras del cuadro anterior, que la mayor concentración vehicular en la región se centra en el estado de México seguido por la CDMX, respecto del resto de entidades. Aunque en algunas casos como Tlaxcala e Hidalgo, quienes manifiestan tasas de crecimiento espectaculares, pero con niveles absolutos de motorización muy por abajo de las dos entidades líderes antes referidas, del orden del 7.08% y 10.24% respectivamente, promedio annual durante el lapso de estudio. A nivel regional el ritmo de motorización resulta un poco más del 5% annual en el periodo, lo cual resulta una tendencia preocupante y de un claro reflejo de su alto crecimiento económico y hacinamiento industrial y humano.

V. Gravedad y Combate a la Pandemia

El agravamiento de la pandemia en la región centro se explica primero por la concentración humana en la misma, resultado de los factores antes multicitados, pero igualmente por un factor insoslayable en este análisis como la permanencia en el poder de un gobierno omiso y corrupto quien ha soslayado su responsabilidad histórica y jurídica de generar los servicios de salud suficientes para la población nacional y la región centro en particular, haciéndolos presas fáciles cara a la pandemia. Propiciando un nivel total de contagio del COVID19 a nivel nacional de alrededor de 4 millones de personas (3,788,986) según cifras de la OMS y con un impacto específico en la CDMX y Estado de México de casi un 30% del total nacional (322 mil defunciones) para medianos del año pasado, vid, (OMS, 22 oct, 2021). Lo que representa la cuota en muertes que ha tenido que pagar esta región, afectando básicamente a sus dos entidades resaltando en dicho momento la dificultad de México de atacar a fondo este problema por la insuficiencia de servicios públicos de salud, personal médico, infraestuctura hospitalaria, rezagos todos ellos acumulados durante el largo periodo neoliberal. Impactando de esta manera, lamentablemente, al personal de salud encargado del combate del coronavirus en México, Vid, BBCnews (24 sep, 2021).

No obstante, para entender la problemática enfrentada por México y ofrecer una panorámica de situación frente a la de otros países en el plano internacional, respecto a fallecimientos ocasionados por el coronavirus, para finales de marzo del 2022 reproducimos la Tabla 4.0 construida a partir de datos publicados por la Revista Expansión, vid, Expansión(23 mar, 2022) donde se reportan las defunciones reportadas por seis de los países más afectados por el COVID19 para principios del 2022 como se aprecia en la siguiente tabla:

TABLA 4.0		
COMPARATIVO MEXICO VS MUNDO. CORONAVIRUS (MAR2022)		
PAIS	TOTAL MUERTOS	MUERTOS/MILLON
ESTADOS UNIDOS	973,000	2.951,19
BRASIL	658,000	3.095,63
INDIA	517,000	374,35
RUSIA	458,000	2.449,82
MEXICO	322,000	2.520,65
PERU	212,000	6.496,18
FUENTE: Elaboraciones propias a partir de Datos macro. Expansion.Mar2022		

De la tabla anterior destaca que México ocupa el quinto lugar mundial tocante a fallecimientos derivados de la pandemia, después de Estados Unidos, Brasil, India, Rusia. Sin embargo, para comprender esta dramática situación conviene destacar el estado deplorable en que la actual administración encuentra al sector salud mexicano de parte de gobiernos anteriores de la época neoliberal. Reproducimos enseguida en la Tabla 4.1 que muestra algunos indicadores provenientes de un análisis comparativo internacional encabezado por la Universidad de California en San Francisco vid, UCSF (24mar,2021) que muestran algunas cifras interesantes que conviene destacar en esta discusión para dimensionar la situación particular de México (en 2019) en rubro de servicios sanitarios.

TABLA 4.1			
GASTO EN SALUD: MEXICO VS OTROS PAISES(2019)(*)			
CONCEPTO	MEXICO	EEUU	OCDE
Gasto Tot. Salud(%)PIB	5.5	16.9	8.8
Gastox Habitante(US$)	1,138	10,586	3,994
Camas(c/1000 Hab)	1.4	2.8	3.3
Doctores(C/1000 Hab)	2.4	2.6	3.5
Enfermeras(C/1000 Hab)	2.9	11.7	8.8
*FUENTE: Elab.propias a partir de: "La respuesta de México al Covid-19: Estudio de caso". Op.cit.			

De las cifras antes reportadas resulta claramente lastimoso el estado que guardaba el país en materia de salud frente a su principal socio comercial Estados Unidos y el promedio de países de la OCDE, en diversos rubros críticos a nivel internacional como el gasto nacional en salud (%PIB), gasto por habitante (Usdls), número de camas, doctores y enfermeras (por c/1000 habitantes). Resultado evidente y explicable gracias a una mala administración y corrupción de parte durante los gobiernos de dicha época, particularmente Fox, Calderón y Peña, o sea los últimos tres décadas, que han dejado, entre otros males por ejemplo, una lastimosa "herencia" en el sector salud de varios centenares de hospitales médicos, algunos incluso "inaugurados oficialmente" por gobiernos anteriores en el país, vid Patiño, Lenin (18 abr, 2021). Desembocando en que el país enfrentase su peor crisis sanitaria de su historia moderna, vid MéxicoEvalua (7 abr, 2021). Crisis que se deja sentir en rubros como falta de infraestructura hospitalaria como antes destacamos, pero también en la escasez de equipo e insumos básicos para combatir la propia pandemia en hospitales vid, Badillo,Diego (14abr,2020), pero igualmente en equipo básico de protección y medicinas para el propio personal médico mexicano combatiente en primera línea del COVID19, quien sufre durante los primeros meses de combate del virus una alta mortandad entre este personal clave para combatir dicho flagelo en el país en dicho momento, vid, BBCnews (24 sep, 2021).

Bajo este status quo la actual gobierno mexicano liderado por el presidente López Obrador, en concordancia con la estrategia económica nacional vid, AMLO.PND (2019-2024) se instrumenta una estrategia específica o ad hoc para combatir el COVID19 en el país desde su surgimiento en 2020 que comprendió entre otras medidas la adquisición masiva de vacunas en el mercado mundial hasta lograr alcanzar el primer lugar de vacunación en América Latina, vid, GobCDMX (23 dic, 2020). Aunque lo más importante de esta estrategia es que no busca recurrir a endeudamiento externo para financiar el combate a la pandemia y reactuvar la economía, como casi todos los países de la región latinoamericana vid, CEPAL (11 mar, 2021).

La estrategia aplicada en México resulta inédita no solamente a nivel de la región latinoamericana sino a nivel mundial. Contrastando abiertamente con la adoptada por los gobiernos mexicanos de décadas pasadas, pero cuyo esquema lo han seguido aplicando la mayoría de los gobiernos latinoamericanos quienes han recurrrido a endeudamiento externo para financiar no solamente el combate al COVID19 sino simultáneamente su reactivación económica mediante proyectos de insfraestructura por la recesión asociada a la pandemia por recomendaciones del FMI. Pero cuya instrumentación haya puesto en riesgo su salud financiera y viabilidad de desarrollo, agudizando sus problemas estructurales vid, Becerra, Brayan X. (27ene, 2022).

Aunque esta estrategia neoliberal no ha sido privativa de países periféricos como Latinoamérica sino también aplicada por países desarrollados como la UE quienes han recurrido a endeundamiento externo para combatir y reactivar sus economías vid, Riegert, Bernd (12 sep, 2021). Sin embargo, a diferencia de las economías latinoamericanas, sus implicaciones para economías desarrolladas quizá sea menos dramáticas socialmente que para las economías latinoamericanas de por sí fuertemente endeudadas donde la recesión asociada a la pandemia ya estaba impactando en 2021 en un aumento del 13.8% de la pobreza extrema en la región como ya anotamos antes, vid, Becerra, Brayan X. (27ene, 2022).

Para fortuna de México, la estrategia anti-pandemia aplicada por la nueva administración desde 2020 ha resultado exitosa pues ha logrado alcanzar el primer lugar en vacunas en América Latina, vid, GobCDMX(23 dic, 2020) y el 7º lugar a nivel mundial Ebrad, Marcelo(14 dic, 2021). De manera muy simplista, dicha estrategia consistió en: 1) adquirir las vacunas necesarias y suficientes de diversas fuentes en el mercado mundial, gracias al buen manejo financiero del gobierno (con fondos del ahorro interno) combinada con una inteligente gestión de México frente a los principales países productores de vacunas, como Rusia, China, India y Estados Unidos México logra garantizar un suficiente stock de vacunas para cubrir la demanda nacional 2) Fortalecimiento y habilitación acelerada de la insfraestructura hospitalaria en todo el país, particularmente en áreas de alta concentración urbana como la región centro con alta densidad poblacional, 3) Contratación de personal médico externo por la insuficiencia de la oferta nacional de médicos para combatir la pandemia y operar la infraestructura hospitalaria ampliada en todo el territorio nacional, 4) en cuarto lugar y último lugar, el lanzamiento de una campaña nacional de vacunación, apoyada logísticamente por las fuerzas armadas en todo el territorio nacional para hacer llegar las vacunas y coadyuvar a su aplicación en todas las regiones del país, estimulando en paralelo la conciencia social entre los mexicanos a vacunarse: Afortunadamente la aplicación de esta estrategia ha resultado exitosa para el país pues ha logrado revertir drásticamente la tendencia hacia el agravamiento de la pandemia en el país hasta el momento.

De tal suerte que la vacunación en México para finales de marzo 2022, por ejemplo, cubría al 87% de la población nacional (casi 130 millones de personas) de todas las edades. Alcanzado una reducción del 96% de contagio de la cuarta ola de COVID hasta dicho momento. El nivel de riesgo epidemiológico a nivel nacional se ubique en "Semáforo Verde". Que implica un nivel de riesgo epidemiológico mínimo de contagio por parte de la población mexicana. Luego de al menos 7-8 semanas consecutivas a la baja en el nivel de hospitalización graves por COVID en México, y reduciendo a un 5% del total de camas ocupadas por personas graves infectadas, vid,Lopez-Gatell, H. (22 mar, 2022)

VI. Conclusiones y Recomendaciones

De los elementos antes expuestos podemos adelantar algunas conclusiones y reflexiones sobre la temática abordada:

1. El crecimiento acelerado observado en la región donde se enclava la CDMX y el Estado de México, las de mayor densidad poblacional, junto a otras cinco entidades conurbadas o vecinas de estas dos entidades. Crecimiento que abarca tanto el PIB (generación de riqueza) como un mayor percápita para los habitantes que conforman todas sus entidades de la región centro. Propiciando por esta vía una mayor generación de empleos formales pero igualmente el surgimiento de informalidad creciente en la misma región por la incapacidad de la región de generar suficientes empleos formales para absorber productivamente su fuerza laboral. Factor clave para este crecimiento resulta la inversión extranjera directa en la región durante los años de estudio.
2. Aunque desafortunadamente este crecimiento resulta desequilibrado, pues conlleva crecimiento pero sin bienestar social e insustentable por el concomitante deterioro ambiental que ha propiciado. Situación que resulta explicable por el modelo económico adoptado por México durante el periodo neoliberal que había sido rebasado por la realidad desde tiempo atrás, vid,Castelanos, A.(30 ene, 2004). Modelo consecuencia de políticas hegemónicas del exterior como el Consenso de Washington, vid, Rangel, R.et al.(2012), cuya aplicación en la economía mexicana revierte los logros alcanzados por México durante la época del "Milagro Mexicano", vid,Carmona, F.et al. (1974), que propicia el actual desequilibrio a nivel nacional y regional asociado a la mundialización económica.
3. La presión social concomitante con la alta concentración humana en la región objeto de nuestra atención, se manifiesta en los altos niveles de densidad poblacional entre las entidades como CDMX y el Estado de México, cuyas poblaciones junto a las otras cinco entidades conurbadas o vecinas han propiciado no solamente costos sociales importantes, como insuficiencia de viviendas, servicios de salud e infraestructura de servicios urbanos básicos, como agua, luz, drenaje e infraestructura transporte, pero también infraestructura hospitalaria suficiente y de calidad para cubrir la demanda regional de este servicio, para satisfacer la demanda poblacional y actividad económica en la región. Sino igualmente ha generado multiples externalidades regionales como delincuencia, pobreza y marginación social en los principales municipios conurbados de la CDMX y Estado de México, factores que representan aceleradores de contagio del COVID19 en estas localidades, como hemos señalado anteriormente vid, UCSF (24mar,2021).
4. En la parte ambiental, resaltan dos factores, primeramente la alta generación de gases de efecto invernadero (CO2), asociada a los altos niveles de motorización resultante de la propia actividad económica y humana en la región especialmente centrados alrededor de la CDMX y Estado de México, junto a otras cinco entidades circunvecinas de éstas. Propiciando, entre otras externalidades, afectaciones pulmonares a los habitantes de ambas entidades, vid León, Mariana (18 mar, 2016) como se refleja en las recurrentes "contingencias ambientales" comunes en la zona metropoliana de la CDMX desde años atrás, vid, Aristegui-Noticias (15 mar, 2016). Donde se reconoce que el Estado de México produce tradicionalmente el doble de contaminación que la CDMX, vid, Rodea, Felipe (13 Abr, 2016). Bajo este entorno macroeconómico surge la pandemia vid, Rodríguez, Darinka et al. (23 jul, 2021) y Forbes (23 ene, 2020). Agudizando así la pobreza y derioro laboral en el país, vid, Patiño, Dainzú (10 dic, 2020).
5. Bajo este marco se inscribe el interés de esta investigación de bosquejar algunas fallas estructurales y externalidades asociadas de la economía mexicana con particular referencia a la región centro, y dentro de ésta la relevancia de la CDMX y estado de México durante los últimos cuarenta años. Región donde destaca crecimiento económico desigual y anárquico de la misma. Crecimiento fuertemente concentrado básicamente en las dos entidades antes referidas que fungen como verdaderos "polos" de desarrollo industrial y de atracción de fuerza laboral de fuera y dentro de región con las consecuencias sociales y externalidades graves como insuficiencia de servicios públicos, dentro del sector salud como hemos enfatizado anteriormente, pero igualmente otras como baja escolaridad promedio en la región y el país, vid, INEE (2017) y vid, Martínez, Nurit (15 may, 2005) pero también rezago educativo nacional, vid, Martínez, Nurit (2011). Factores que conjuntamente han contribuido a afectar la estabilidad social de la región frente a problemas coyunturales inéditos como la pandemia y el costo en muertes por el bajo nivel sociocultural de la población a nivel nacional y regional para poder enfrentar con una mayor responsabilidad social la crisis sanitaria a nivel individual y comunitaria en los municipios y entidades de mayor nivel de contagio.
6. En otras palabras, el agravamiento de la pandemia en México y sus implicaciones para la región centro en particular puede explicarse primero por la adopción de un modelo de desarrollo neoliberal impuesto por hegemonías mediante políticas hegemónicas como el Consenso de Washington

pero que ha resultado rebasado por la realidad, vid, Castelanos, A. (30 ene, 2004). Lo que ha conducido al país a un esquema de desarrollo excluyente y desequilibrado generando un esquema de economía dual, sectorial y regional a su interior (región "norte" y "sur"), desde tiempo atrás, vid, Gollás, Manuel (1982). Fenómeno que se replica en un contexto global bajo el advenimiento de la mundialización económico en el desequilibrio que se percibe entre economías periféricas o emergentes (como México) frente a las desarrolladas en los últimos cuarenta años vid, Luis-Pineda, O. (sep, 2021). Donde encontramos que la mundialización económica ha propiciado crecimiento económico pero no bienestar social (con menoscabo en general al énfasis en la inversión en ciencia y tecnología) al interior de las economías periféricas mientras que en economías desarrolladas se ha propiciado crecimiento pero con bienestar social (sin soslayar la inversión en ciencia y tecnología durante los últimos cuarenta años, vid, Luis-Pineda, O. (sep(b), 2021). A nivel mundial y dentro de las economías desarrolladas, con economías de mercado el mejor balance entre crecimiento y bienestar social bajo un entorno sustentable lo representan los países escandinavos. Países donde existen economías de bienestar, vid, Luis-Pineda, O. (8 ene, 2021). Donde existe una verdadera rectoría económica del Estado con alta participación social, siendo capaz de balancear el binomio crecimiento y bienestar social bajo un entorno sustentable. O sea, economías capitalistas que han podido instrumentar una estrategia de desarrollo económico, socialmente incluyente y sustentable bajo el actual entorno global, vid, Erikson, Robert (1987).

7. Luego entonces, la problemática detectada entre los grandes municipios o áreas urbanas de México como la CDMX, Ecatepec, Cd. Juárez, Tijuana y otras urbes mexicanas vid, Luis-Pineda, O. (Sep.(a), 2021). Es que replican exactamente el mismo patrón de desequilibrio económico y social observado a nivel nacional y regiones del país (reflejo de la asimetría macroregional existente entre "norte" y "sur") y también el comportamiento existente entre las economías periféricas y desarrolladas a escala global replicando los desequilibrios y externalidades como pobreza, desempleo, hacinamiento, etc, existente entre las primeras. Pero aquí a escala o nivel "microregional" con los agravantes de un menor espacio territorial. Entonces la actual administración intenta alejarse del enfoque recomendado por el I FMI, que han llevado al desastre económico a muchas economías de la región latinoamericanas en el pasado reciente vid, Bermúdez, Ángel (2019). buscando fomentar un desarrollo incluyente y sustentable.

8. En conclusión, podemos adelantar que la estrategia anti-covid emprendida por el actual gobierno mexicano ha resultado éxitosa primeramente por haber si capaz de contener y revertir el agravamiento de la pandemia en el país pero también por haber podido capaz de reactivar la economía en medio de la pandemia mediante cuatiosas inversiones públicas en diversos proyectos de infraestructura como el megaproyecto Tren Maya de 200 mil millones de pesos, vid,Jimenez Pons,R. (27 oct, 2021) y Corredor Interoaceánico de Tehuantepec vid, AMLO (25 abr, 2022) con una inversión estimada de 20mmp. Que se espera arranque para finales de año 2022, y que implica la reactivación comercial y de pasajeros, por sistema multimodal (ferrocarril y carretera) entre Atlántico y Pacífico. Asimismo, consideramos también al megaproyecto de la Refinería de Dos Bocas, con una inversión total estimada de 12,500 mmd en el estado de Tabasco, contemplada a inaugurarse para julio 2022, vid,Bloomberg (21 ene, 2022). Sin contar con la reciente compra de la Refinería de Deer Park en Houston Texas por 596 millones de dólares por parte del gobierno mexicano. vid, Usla, Héctor (10 ene, 2022). Ambas refinerías con el compromiso de garantizar la autosuficiencia nacional en materia de gasolinas por parte del actual gobierno Pero excepción hecha de la inversión en Deer Park en Estados Unidos, el mayor flujo de estas inversiones públicas se canalizan hacia la macroregión Sur (pacífico-sur, sureste y golfo de México). Algunas inversiones se han canalizado también hacia la macroregión Norte (norte, noroeste, occidente y centro) como el caso del referido aeropuerto AIFA en el estado de Hidalgo de la región centro que aquí estudiamos. Enfatizando que todas estas megainversiones en infraestructura en suelo mexicano están siendo financiados con fondos propios y construidos sin interrupción en plena pandemia. Estrategia económica y anti-pandemica que ha resultado exitosa pues se ha traducido en un crecimiento económico espectacular por arriba del 6% para 2021, vid, FMI (2 jun, 2021), liderado por un gobierno fuerte donde existe una verdadera rectoria económica del Estado, y cuyo liderazgo resulta incuestionable pues internacional es reconocido mundialmente, pues AMLO ocupa el segundo lugar mundial evaluado como mejor presidente, vid, FinancialTimes (25 oct, 2021). Gracias en buena medida a todos los logros referidos antes mencionados resultado de la aplicación la estrategia socialmente incluyente aplicada que básicamente consiste en intentar instrumentar una ruta propia de crecimiento para México, que claramente resulta inédita entre la periferia y particular en la región latinoamericana actualmente. Situación que era inconcebible hace más de una década cuando

planteámos el imperativo de la reconversión del modelo neoliberal por otro que contemplara crecimiento y bienestar social bajo un entorno sustentable para México, vid, Luis Pineda, O. (2008).

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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.

Color charges: Authors are advised to pay the full cost for the reproduction of their color artwork. Hence, please note that if there is color artwork in your manuscript when it is accepted for publication, we would require you to complete and return a Color Work Agreement form before your paper can be published. Also, you can email your editor to remove the color fee after acceptance of the paper.

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.

Mistakes to avoid:

- Insertion of a title at the foot of a page with subsequent text on the next page.
- 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.

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.

- o You may propose future guidelines, such as how an experiment might be personalized to accomplish a new idea.
- o Give details of all of your remarks as much as possible, focusing on mechanisms.
- o 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.
- o 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?
- o 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.

The Administration Rules

Administration Rules to Be Strictly Followed before Submitting Your Research Paper to Global Journals Inc.

Please read the following rules and regulations carefully before submitting your research paper to Global Journals Inc. to avoid rejection.

Segment draft and final research paper: You have to strictly follow the template of a research paper, failing which your paper may get rejected. You are expected to write each part of the paper wholly on your own. The peer reviewers need to identify your own perspective of the concepts in your own terms. Please do not extract straight from any other source, and do not rephrase someone else's analysis. Do not allow anyone else to proofread your manuscript.

Written material: You may discuss this with your guides and key sources. Do not copy anyone else's paper, even if this is only imitation, otherwise it will be rejected on the grounds of plagiarism, which is illegal. Various methods to avoid plagiarism are strictly applied by us to every paper, and, if found guilty, you may be blacklisted, which could affect your career adversely. To guard yourself and others from possible illegal use, please do not permit anyone to use or even read your paper and file.

CRITERION FOR GRADING A RESEARCH PAPER (COMPILATION) BY GLOBAL JOURNALS

Please note that following table is only a Grading of "Paper Compilation" and not on "Performed/Stated Research" whose grading solely depends on Individual Assigned Peer Reviewer and Editorial Board Member. These can be available only on request and after decision of Paper. This report will be the property of Global Journals

Topics	Grades		
	A-B	**C-D**	**E-F**
Abstract	Clear and concise with appropriate content, Correct format. 200 words or below	Unclear summary and no specific data, Incorrect form Above 200 words	No specific data with ambiguous information Above 250 words
Introduction	Containing all background details with clear goal and appropriate details, flow specification, no grammar and spelling mistake, well organized sentence and paragraph, reference cited	Unclear and confusing data, appropriate format, grammar and spelling errors with unorganized matter	Out of place depth and content, hazy format
Methods and Procedures	Clear and to the point with well arranged paragraph, precision and accuracy of facts and figures, well organized subheads	Difficult to comprehend with embarrassed text, too much explanation but completed	Incorrect and unorganized structure with hazy meaning
Result	Well organized, Clear and specific, Correct units with precision, correct data, well structuring of paragraph, no grammar and spelling mistake	Complete and embarrassed text, difficult to comprehend	Irregular format with wrong facts and figures
Discussion	Well organized, meaningful specification, sound conclusion, logical and concise explanation, highly structured paragraph reference cited	Wordy, unclear conclusion, spurious	Conclusion is not cited, unorganized, difficult to comprehend
References	Complete and correct format, well organized	Beside the point, Incomplete	Wrong format and structuring

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