Change and social policy in Mexico: insights from ideational institutionalism

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Resumen

Abstract

En México, el gobierno federal ha implementado un modelo anti-pobreza de corte neoliberal en las últimas décadas. El mantra de este paradigma es orientar la ayuda a los extremadamente pobres; instituciones federales se han creado para lograr este objetivo. Según el modelo de path dependency, una vez establecidas ciertas políticas públicas, la inercia institucional puede generar una dinámica propia que tiende a descartar alternativas. Sin embargo, una reforma significativa en la forma en la que pobreza se define y mide se llevó a cabo a nivel federal. En el centro de esta reforma, hubo una lucha entre distintos actores políticos clave por definir el curso adecuado para combatir la pobreza. Al observar el papel de las ideas en el proceso de cambio de políticas sociales, este documento propone que esto constituye un factor clave para entender dicho proceso en México.

In Mexico, the federal government has implemented a neoliberal paradigm for tackling poverty over the last decades. The mantra of this paradigm is targeting aid to the extremely poor, and federal institutions were created to accomplish this aim. According to path dependency model, once institutions are set to implement policies, bureaucratic inertia can generate a dynamic of their own that may eventually rule out alternatives. Nonetheless, an important reform in the way poverty is defined and measured was just implemented at federal level. At the centre of this reform, there was a struggle over the appropriate course of action to tackle poverty among key policy actors. By looking at the role of policy ideas in the process of social policy change, this paper proposes that this constitutes a key factor to understand such process in Mexico.

llabras clave	
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Pa

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Introduction

The 1980s was a decade of profound policy change. The arrival of a new political elite was a driving force behind the implementation of neoliberal paradigm in Mexico. The Mexican federal government has followed this paradigm to tackle poverty since then. One of the main ontological beliefs at the core of this paradigm is to provide social assistance only to the extreme poor. Accordingly, the main anti-poverty programme is a conditional cash transfer programme (CCT) focused on extreme poor families with school-age children. Targeting mechanisms are thus essential to implement this programme, which requires identifying and counting the poor. In 2002, the federal government established an official definition and measurement of poverty, which marked the consolidation of the neo-liberal paradigm in the social policy realm.

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The choice of a definition and measure of poverty has huge normative and political implications. This implication is very clear in Mexico, where the access to social assistance depends on being classed as poor according to a given criteria. Moreover, these decisions determine the extent and severity of poverty that is taken as the evidence to justify a given course of public action. "Definitions thus have to be understood as political as well as social scientific and as such has often been the source of controversy" (Lister, 2004: 13). This has definitely been the case in Mexico. Furthermore, implemented policy programmes reflect a dominant concept, definition, and measurement of poverty (Lister, 2004). In other words, "concepts of poverty have practical effects: They carry implicit explanations which, in turn, underpin policy proscriptions" (Lister, 2004: 3). In other words, the definition and measurement of poverty practically define the nature of the policy to tackle it.

Drawing on ideational literature (Hassenteufel *et al.*, 2010; Belánd 2009; Genyes and Smyrl, 2008a; 2008b; Campbell, 2004; Schmidt, 2008), this paper looks at the existence of conflicting policy ideas held by key policy actors to understand policy change (and continuity) in Mexico. To do so, the evolution of the neoliberal paradigm to tackle poverty is analysed. In particular, this analysis is focused on the main antipoverty policy in Mexico (Oportunidades programme). This analysis shows that although the neoliberal paradigm is dominant at federal level, there are dissident policy actors who have advocated for alternative policy ideas. The hypothesis that guides this preliminary study is that the apparent conflict over how poverty is defined and, above all, the adequate policies to tackle this problem, among different state actors is an important factor of social policy change in Mexico.

The remainder of the paper is organized as follows. In the first part, the role of policy ideas in policy change is briefly discussed. The second part comprises a succinct analysis of the evolution of the poverty paradigm implemented in Mexico, particular attention is given to the definition of poverty embedded in it. In the third part, the conflict over the definition of poverty held by key policy actor during the last decade is analysed. In the fourth part, the role of struggle among key policy actor to explain change (and continuity) in the social policy realm in Mexico is discussed. The final part includes some conclusive remarks.

I. The role of ideas in social policy change

Social policy analysis has been enriched by a new institutionalism tradition centred on ideas as a factor of institutional or policy change in modern welfare states (Béland, 2009; Béland, 2007a; Genieys & Smyrl, 2008a; 2008b; Béland, 2007; Taylor-Gooby. 2005; Béland, 2005; Campbell, 2004; Hay, 2006; Schmidt & Radaelli, 2004; Hudson, Hwang, & Kühner, 2008; Schmidt, 2002; Blyth, 2002;). While acknowledging the role of formal institutions, ideational literature includes different approaches that use the notion of ideas as a factor of policy change (Béland, 2005). Overall, ideational literature tries to elucidate other causes of policy change (or steadiness) apart from those related to external factors, such as massive crises, or those that favour status quo or institutional "stickiness" (see Schmidt, 2008). In particular, ideational literature has placed the emphasis on endogenous factors of policy change.

Some ideational approaches centred on actors help us to better understand the content of policy reform (Hassenteufel *et al*, 2010). They pay particular attention to the actors' views or "interpretations of their interests" and of "the material context and the institutional framework in which actors operate" (Stolfi, 2010: 109). Accordingly, these approaches look at the policy choices that occur within the institutional frameworks, as well as the content and origin of the actors' preferences and goals or "what issues they deem as important" (Béland, 2009: 703). Moreover, by pointing at endogenous factors, ideational approaches have also shed light on the politics of change, in particular, the struggle featured by the bone and flesh actors involved in policymaking in democratic societies (Genieys and Smyrl, 2008a; 2008b). In other words, these ideational approaches allow us to explain the concrete form of particular changes in a given policy sector (Knill & Lenschow, 2007:44).

In this line of though, Hassenteufel *et al.* (2010) propose that the action of "collective actors who share policy ideas and compete for legitimate authority over sectoral policy making" is the main driver of policy change in particular contexts (Hassenteufel, *et al.*, 2010:518). According to proposition, these particular actors "are important drivers of policy change and, in particular, are the principal determinants of policy content" (*ibid*: 519). Hence, the existence of conflicting policy ideas held by key policy actors (*e.g.* programatic elites) provided us key insights to understand policy change (Hassenteufel *et al.*, 2010; Genieys and Smyrl, 2008a; 2008b). This approach is used in this study in order to analyse recent changes in the social policy realm in Mexico.

In order to operationalise this approach, the notions of policy ideas, policy paradigms and programmes are defined as follows. Policy ideas are, as herein defined, constructions that inform the particular definitions of a given issue or social condition as a policy problem and their related policy prescriptions, which policy actors circulate in the policy and political arenas.¹ Accordingly, particular

¹ This definition is based on Kingdon's (2003) insightful approach to looking at ideas in policymaking. According to this author, ideas are the matter that is worked with in policymaking: policy actors "work through" them in various ways, by evaluating and discussing them, or by lobbying or mobilising a number of people (Kingdon, 2003: 125).

conceptualizations of poverty are related to specific policy ideas (see Medrano, 2009). Consequently, actors' interpretations entail their views about what they consider to be appropriate or legitimate in terms of policy action. Furthermore, definitions imbued into policy ideas have an imminent "political" nature: "problem definition can never be purely a technical exercise" (Rochefort & Cobb, 1994: 8), nor a simple mechanical reaction to indicators, events or feedback from the overall public or other policy actors. Overall, this is related to what Stone (1997) identified as actors' competition over problem definitions and legitimation.

In the case of poverty, the concepts of this social problem are mediated by definitions and measures (Lister, 2004). Concepts are about the meanings of poverty, which are essentially shaped by social actors' perceptions. Definitions often "provide a more precise statement of what distinguishes the state of poverty and of being poor from that of not being in poverty/poor" (Lister, 2004: 4). Governments depart from a given poverty definition to identify and count the poor, as well as to determine the characteristics and size of this phenomenon in a given country. Consequently, measures constitute the technical operationalisation of a particular definition of poverty (Noble, Wright & Cluver, 2005; Lister, 2004). Furthermore, definition of povertys are at the centre of the programmes implemented to tackle this problem, which in turn are linked to a given policy paradigm.

Policy paradigms involve three aspects.² First, they a policy paradigm comprises a relatively coherent set of scientific, technical and normative assumptions which provide guidelines to define a policy problem, as well as to delineate the corresponding prescriptive elements to tackle it, such as "principles of action" and "methodological prescriptions and practices" (Surel, 2000). Second, policy paradigms are shared by a group of policy actors, which limit the range of alternatives "likely to perceive as useful and worth considering" (Campbell 2004: 385). They constitute key policymakers' frames of references or "road maps" (Béland 2005: 8). Additionally, the establishment a given policy paradigm reflects the triumph of particular actors' policy ideas, which "retain it for some time through an institutional position" (see Geneys and Smyrl, 2008b: 24-25). In this sense, policy paradigms are not only "road" maps but a source and consequence of power (*Ibid*.).

Surel (2000: 497-98) identify four constitutive elements of paradigms, which are: (1) basic principles or "ontological beliefs" that define the core of policy programme (for instance, market is the best mechanism to allocate resources); (2) specific principles that imply a general choice of action (for example, to assist the extreme poor in participating in the labour market); (3) mechanisms, techniques and methods (for instance, the measurement of extreme poverty to focalised aid to the extreme

² This term and others similar have been widely used, for instance, référentiels" (Genieys & Smyrl, 2008b), "cognitive and normative frames" (Surel, 2000).

poor); and (4) specific instruments or detailed decisions concerning the application of mechanisms (for instance, the specific value of a poverty line, such as 50 percent of a median income in a given country). Policy paradigms thus enclose the structured intellectual background prevalent in a given policy regime (Campbell, 2004).

Finally, policy programmes constitute the materialisation of policy ideas; they are implemented or institutionalised "policy prescriptions" or "strategies" (Campbell, 2004: 98). Since policy programmes synthesise the goals and main policy prescriptions in a given policy regime, they are often "the key dependent variable for institutionalists" that analyse the role of policy ideas in policy change (Campbell, 2004: 98). Indeed, in order to spot the dominant ideas that prevail in a given policy regimen, the main source to look at is policy programmes, as they are infused by its policy goals, objective and forms of actions prevailing in it.

2.1 Competition over authority as factor of policy change

Power struggles are always present and latent in policymaking. The participation of multiple and different actors in any policy and political process leads to the existence of conflicting policy ideas among them. Rochefort and Cobb (1994) observed that policymaking is essentially "a struggle over alternative realities" (*Ibid*: 9). Actor-based ideational approaches allow us to better understand the role of this struggle in policy change. Genieys and Smyrl (2008a; 2008b) depart from the notion that "policy change as an evolutionary process", which is product of the conflict among state elites. Overall, they "suggested that neither functionalist imperatives nor objective interests provide a sufficient explanation for the behaviour of policy relevant actors", who may eventually wish to alter the institutional and policy system in which they are in (Genieys and Smyrl, 2008b: 9-10).

In this line of thought, the actor-based approach proposed by Hassenteufel et al (2010) is based on three dimensions, which are the following. Firstly, "actors need resources to influence public policies. Institutional position, legitimacy, strategic capacity, and expert knowledge are among the most relevant resources for policy-making capacity" (Haseenteufel *et al*, 2010: 528). The second dimension refers to new policy ideas themselves. Authors refer to this dimension as a particular reform program. The third dimension is motivation, or purpose. As mentioned before, policy actors pursue more than material gains or the reassertion their identities: "They are also engaged in the competition for legitimate authority, which is a permanent incentive for policy innovation largely because of the perceived prestige that comes from being the ones that shape policy" (Hassenteufel *et al*, 2010: 528). Accordingly, the central claim of this approach is that "the struggle among a relatively small

number of elite actors for legitimate authority" provides "a key dynamic element that explains policy change" (Genieys and Smyrl, 2008b: 9-10). The agent of change is thus a group of key policy actors who manage to prevail in the struggle for authority against other competing actors. In other words, the competition for authority constitutes an endogenous factor of change.

This explanation relies in the actions of specific policy elites or influential actors, which are linked to concrete policy regimes or sectors. These groups can be cast as "programmatic elites", which are defined as a "group of actors with direct access to policy-making positions that is self-consciously structured around a common commitment to a concrete and coherent programmatic model for a given policy sector" (Genieys and Smyrl, 2008b: 9-10). Overall, relevant policy actors must fulfil three conditions in order to become "agents of change": to have the resources (mainly access to power, but also coordination), to be integrated around specific policy ideas, and to pursue vying to impose their ideas.

According to this argument, key groups of policy actors (for instance, programmatic elites) promote change as they fight for making their policy model a reality. In other words, "as a direct result of their competition for authority over policy with other elite groups within the state, programmatic elites can be the agents of endogenous policy change in "the absence either of radical institutional change or of a significant alteration in social "demand" for policy" (Genieys & Smyrl 2008a: 76). Consequently, the explanation of policy change rest on the choices of "identifiable actors" within the policy area (Genieys & Smyrl 2008a: 78).

The competition for authority as a factor of change can be also seen as a struggle over legitimation. Some policy ideas (problem definitions and solutions) are embedded in the already established institutions (for instance, enacted laws or policy programmes) that structure actors' interactions in the present. But, at the same time, alternative policy ideas are backed by contending policy actors, who may challenge the status quo. Policy ideas mobilised in the public arena could become (if their supporters succeed) new laws or policy programmes. This means that potential conflict among competing policy ideas is at the heart of policy change. Furthermore, this conflict demands the building of policy legitimation among other actors and the general public. The final result of such a struggle is the materialisation of a policy idea into a policy programmes or a piece of legislation. One way to observe such conflict is looking at the evolution of given programme over the time. In the next section, the evolution of the main anti-poverty programme in Mexico is briefly analysed.

3. The evolution of the neoliberal poverty paradigm in Mexico

At the beginning of the 1980s, the Mexican economy faced adverse internal and external factors, which led to a severe economic crisis. In the middle of these

adverse circumstances, former President Miguel de la Madrid, accompanied by young elite, started a new presidential term in 1982. This new policy elite has often label as politicians technocrats, characterised for having a graduate degree from a foreign university, especially from famous American universities, and with important old-school ties with foreign banks and multilateral institutions (Babb, 2002). This "technocracy" can be also seen as a programmatic elite that implemented a comprehensive policy plan. Indeed, the arrival of technocratic group into power marked the beginning of huge economic reforms and a shift in the provision of social protection for the population (Camp, 2003).

These structural changes were part of the introduction of a neoliberal paradigm in Mexico. Neo-liberalism is commonly "understood to rest on five values: the individual; freedom of choice; market security; laissez faire, and minimal government" (Lerner, 2000: 7). Overall, the policy prescriptions emanated from this paradigm focused on expanding role of the free market, enhancing economic efficiency and international competitiveness, which have been promoted by the Washington Consensus.³ In accordance with the new economic paradigm, the social policy approach was redefined. This change implied that this government started leaving behind the apparent attempts of previous governments to provide a minimum social base for all Mexican citizens (although this aim was unfulfilled), based on universal education, compensatory policies and some universal subsidies (Brachet-Márquez, 2004; 1994). The Mexican state thus retreated from its role of welfare provider to its citizens, as it happened in other Latin American countries (Haagh, 2002).

In this context of dramatic change and economic difficulties, people from the same political elite managed to keep power in the 1988 federal election. In fact, the ruling technocracy, in particular U.S.-trained economists, "whose views emerged during the De la Madrid administration", "were promoted to top policy positions during the subsequent administrations of Carlos Salinas (1988-94) and Ernesto Zedillo (1994-2000). Thus, in the ensuing years, Mexico's free-market policy path was consolidated" (Fourcade-Gourinchas & Babb, 2002: 561). In the case of social policy, the following government introduced a new anti-poverty programme, which marked the beginning of a new paradigm to address poverty. In the next sub-section, the evolution of this programme is briefly discussed.

3.1 The CCT strategy

In 1988, President Carlos Salinas de Gortari was elected in a highly controversial election, which casted serious doubts about the legitimacy of his electoral victory.

³ Nonetheless, neo-liberalism has several conceptualisations, and the implementation of its principles varies across different countries or institutional settings (Albo, 2002; Lerner, 2000).

The new government was thus eager to gain legitimacy among Mexicans. Under these circumstances, a new anti-poverty programme was born in 1989, which was called Pronasol, an acronym from Programa Nacional de Solidaridad (National Solidarity Programme, in English), which was also known as Solidaridad (solidarity, in English). This anti-poverty initiative focused on alleviating extreme poverty, that is, those who due to their truly adverse circumstances were unable to work. This aim became the main explicit objective of this programme. Apart from the idea that the state should only focus on help to the poorest, this new anti-poverty programme included another basic idea: the poor must be involved in participating in the "solution of social problems" (Piester, 1997: 469). Implicitly, this idea stresses the responsibility of the poor in solving their own condition. Thus, Pronasol marked the beginning of a new social policy paradigm to tackle poverty.

This paradigm was in harmony with the neoliberal conception of the role of the state in the provision of social protection. This poverty paradigm was in tune with traditional anti-poverty strategy developed by international organisations, such as the World Bank and International Monetary Fund, which basically consists in three elements: economic growth, investing in human capital, especially education, and safety nets for the poor (Gordon, 2004;Addison & Cornia, 2001). Accordingly, social policy thus took a residual character and was directed at alleviating poverty only when markets and family networks fail (Boltvinik, 2004; Laurell, 2003). Moreover, inequality was virtually eliminated from the policy agenda.

As for the mechanisms to achieve its main objective, Solidaridad covered a wide range of activities, such as food support programmes, credits to farmers, grants scholarships for children, and infrastructure programmes (for instance, building rural schools, roads, and so on). But despite the official objective (targeting the poorest), government did not implement clear and systematic methods to achieve such a goal. In fact, focalisation was made mainly by identifying poor neighbourhoods and communities rather than individuals (Boltvinik & Damián, 2004). For this reason, Solidaridad was often regarded more as a political strategy with electoral purposes than an effective anti-poverty programme (Molinar & Weldon, 1994; Cornelius, Craig & Fox, 1994; Dresser, 1994; 1997). These critiques caused a bad image of this antipoverty programme. In this context, the following administration launched a new and improved anti-poverty programme.

At the end of 1994 and during 1995, a dark panorama prevailed in Mexico. President Ernesto Zedillo Ponce de León (1994-2000) faced two crises that hit the country at the beginning of his presidential term: the political crisis originated by the Zapatista guerrillas, and the currency crisis. President Zedillo and top members of his administration had basically the same technocratic profile as the political elite that took power in 1982. Unsurprisingly, economic policy continued, as well as the main policy principles of the previously implemented poverty policy: to target aid only to the extreme poor. However, in 1997, this new administration introduced a new programme which included different mechanisms and methods to achieve such aim. These changes signified a qualitative move towards the consolidation of the neoliberal paradigm in Mexico. The new anti-poverty initiative was called "Progresa", the Spanish acronym for the Education, Health and Nutrition Programme, and embodied the ultimate neoliberal poverty paradigm.

A relatively small number of experts participated in the formulation of the Progresa programme. The key governmental actors were Santiago Levy, a top official of the finance ministry in Zedillo's administration, who was very close related to the Inter-American Development Bank (IADB), and José Gómez de León, a close personal friend of the president, and head of CONAPO (National Population Council). In addition, external actors, in particular, people from the IADB, and the International Food Policy Research Institute (IFPRI) participated in the development of the Progresa programme (Teichman, 2007; Uña *et al*, 2010). In fact, these domestic and international actors constituted "a tightly knit and highly integrated transnationalized network, involving a high degree of trust and personal friendships", which "had an important impact on the continuity and nature of the program" (Teichman, 2007;661).

However, the adoption of a Progresa did not exclude controversy within the Mexican federal government. There President himself and Santiago Levy supported the capital human theory embedded in the conditioned cash transfer strategy, which was finally implemented (seeValencia & Aguirre, 1998). On the other hand, top officials of the Ministry of Social Development of Zedillo's administration had doubts about the effectiveness of this strategy (Valencia & Aguirre, 1998). Subsequently, before the beginning of the subsequent administration in 2000, this programme "received an onslaught of criticism from the Mexican congress, from the left, from civil society organizations, among other actors (Teichman, 2007: 562). Critics denounced "the absence of community participation at all stages (program design, the selection of beneficiaries, monitoring), the exclusion of many deserving poor, and the potential divisive impact on poor communities" (Teichman, 2007: 562).

Despite those critiques made at different stages of the implementation of Progresa programme, the technocratic elite succeed imposed its approach. In fact, during the subsequent administration (2000-2006) this paradigm was consolidated. (This point is further developed in the next section.) The main characteristics of this paradigm are briefly described as follows:

Key principles, goals and the concept of poverty. Progresa was in line with the human capital theory supported by international organisation such as the Inter-American Development Bank. Overall, this theory places the root of poverty in the lack of human capital, which essentially refers to individuals' education, experience and abilities, which allow them to participate in the labour market and generate income. Furthermore, this international agency also emphasized the role of economic growth as the main factor in reducing poverty in developing countries (BID, 1998).

According to this perspective, the main cause of poverty is placed at individual level: lack of human capital (see Levy, 1991; 1994). Therefore, it was claimed that targeted programmes, such as Progresa, attack "the causes of poverty (lack of education) and not just its consequences (low incomes)" (Székely & Fuentes, 2002). Hence, the ultimate goal of this programme was to break the intergenerational transmission of poverty. The underlying hypothesis was that by assisting children in acquiring human capital (essentially basic education), they increased their chances to increase their well-being in the future. In other words, deprivation is essentially seen as a result of lack of education. Furthermore, low education or training was mainly associated to precarious nutrition and health. This means that Progresa had a strong emphasis on individuals' agency to overcome poverty, that is, the extremely poor themselves should "get on their feet and work their way out of poverty" (Levy, 1991).

Main mechanisms and methods. The main mechanism to accomplish this official objective was a conditioned cash transfer programme (CCT) to aid the extreme poor. Overall, this strategy involved a means-tested cash transfer delivered every two months to mothers of poor children conditional upon the school attendance of their children and health checks for the family, especially for children, pregnant and nursing women. In other words, the main targeted population is poor households with school-age children.⁴ Additionally, the cash transfers were capped in order to avoid welfare dependency.

The methods to accomplish this strategy consisted in the establishment of technical criteria to achieve the target population. The introduction of a targeting methodology implied an important difference from the previous anti-poverty programme (Solidaridad). Overall, this methodology involved the identification of poor localities based on a geographical marginality index, which was provided by a governmental agency (the National Council of Population) and other indicators available for the specific area.⁵ In addition, the availability of education and health

⁴ Nonetheless, the programme excluded many poor households with children (see Medrano, 2011).

⁵ This method remained the same until 2002, when some modifications were introduced in order to target the extremely-poor in urban areas.

centres is also confirmed as prerequisites to operate the programme. Then, households were "assessed" to determine whether a household is poor or non-poor based on the information from a survey (Orozco & Hubert, 2005).

3.2 Consolidation: better methods, same recipe

The beginning of the new millennium was also the start of a new political era in Mexico. In that year, PresidentVicente Fox took office (2000-2006), and his presidency brought into power the main right-wing political party in Mexico, Partido Acción Nacional (PAN or National Action Party, in English), for the first time in over seven decades. From the late twenties and until 2000, only one single party ruled in Mexico at federal level: Partido Revolucionario Institucional, PRI (Institutional Revolutionary Party, in English). The arrival of this right-wing government, thus, ended more than seventy years of hegemony of the previous ruling party. Furthermore, unlike previous political transitions, Mexico enjoyed economic stability. Undoubtedly, the new administration signified a massive political change in this country. Nonetheless, the economic and poverty paradigm remained essentially the same. An important factor behind this policy continuity was the permanence of key members of the policy elite in charge of designing the economic and social policy during the former administration.

The close relations between the Levy and Gómez de León and the IADB and IFPRI people had also a crucial role in the permanence of Progresa (Teichman, 2007, and Uña *et al*, 2010). "To ensure the continuity of the program, its technocratic originators sought, as early as 1997, the involvement" of these international actors (Teichman, 2007: 562). IFPRI conducted an evaluation of Progresa in 2000, which provided local and international legitimation. "An IADB official not only recommended IFPRI as the organization with people who could carry out such an evaluation, but the bank also lent Mexico the money to hire the consulting agency" (Teichman, 2007: 569). The overall conclusion of this evaluation was positive and generated a very good impression within the new administration. Additionally, in 1999, Levy approached the IADB for a loan for Progresa. Once President Fox took office, this government obtained the largest loan ever approved by IADB to Mexico (1 billion dollar). Thanks to this loan, the Mexican government expanded Progresa's coverage to urban areas and guaranteed the consolidation of this programme.

Progresa remained the most important anti-poverty programme during Fox's administration. However, some changes took place, including new discursive elements and name. Firstly, in 2002, Progresa was renamed "Oportunidades" (opportunities in English) and the human development concept was included into the government's

anti-poverty discourse. This discourse combined the human capital idea introduced by Progresa and Sen's human development approach. The adoption of this later approach was actually done in rather vague and ambiguous way (see Flores-Crespo and de la Torre, 2007). Accordingly, the long term objective of this programme was to expand the capabilities and opportunities enjoyed by the poor. This discourse was perfectly in line with the development agenda proposed by the World Bank, which proposed an increase in human capital and capabilities as the best way to alleviate poverty (World Bank, 2000). Indeed, these ideas and those included into Fox's National Plan of Development were "almost identical" (Charnock, 2006: 82).

The methods for measuring poverty were another change introduced by this administration. This method involved the establishment of an official definition of poverty. In 2001, the Mexican federal government adopted a specific methodology to measure poverty, following the recommendations of the Technical Committee for the Measurement of Poverty (the Committee, from now onwards), which was purposely established by the federal government to do so. The Committee was made of a group of academic researchers, who were appointed and sponsored by the Ministry of Social Development (SEDESOL). The Committee adopted an absolute definition of poverty related to the impossibility of individuals to reach biological efficiency (SEDESOL, 2002). Absolute poverty was defined as "not being adequately nourished and reasonably healthy", while relative (or moderated) poverty is "associated with the fact that persons in a household can have experiences that they consider significant" in their social context (SEDESOL, 2002: 19). In short, the official definition of poverty is focused on the characterization of poverty (lack of basic needs) from a narrow perspective. This definition was essentially in line with the concept of poverty embedded in the Oportunidades programme.

In order to operationalise the official definition of absolute poverty, the Committee decided to adopt the one-dimensional method based on the individual's income to identify poverty lines, based on the Foster-Greer-Thorbecke (1984) poverty measure (SEDESOL, 2002). This method was argued to be the easiest and most transparent manner to measure poverty because it only requires the determination of the amount of current income that individuals need to satisfy their fundamental necessities. Yet, the Committee recognised that since poverty is a multidimensional phenomenon, multidimensional measures would represent an ideal objective, in particular "mixed measures that integrated monetary and non-monetary indicators" (SEDESOL, 2002). However, the Committee did not adopt such measures. Thus, the federal government institutionalised the Foster-Greer-Thorbecke (1984) poverty measure, using non-equalised income and the expenditure survey (ENIGH) as the main data source.

In order to determine a poverty line, the Committee adapted the Basic Food Basket (BFB) developed by INEGI-CEPAL⁶ for Mexico (INEGI-CEPAL, 1993). The BFB is a normative basket that a priori establishes the minimum number of units of energy (calories) and proteins that one individual needs per day in rural and urban areas, and includes basic food products, following actual consumption patterns, that fulfil those minimum nutrition requirements. It is important to note that the characteristics of the basket, that is, the number, quality, quantity of goods and services classed as essential or basic, determines the establishment of a broader or narrower poverty threshold. Accordingly, the technical decisions made to choose a given basket of good has huge policy implications.

Based on this methodology, official poverty data were made widely available in Mexico from 2002. In this year, the federal government started to publish official poverty rates for the overall population (without identifying specific groups, such as children) in official documents and on government web pages. The Mexican federal government thus tried to show that the decision about who deserves to receive social assistance was based on a technical procedure and not on the whimsical decisions of public servants. However, this definition and measurement of poverty has had its critics. In fact, the debate around the poverty definition and measurement has reflected an intense debate among different actors in Mexico. In the following section, this point is further discussed.

4. The battle over the definition of poverty

During 1980 decade, the arrival of a new political elite was a driving force behind the change of the social policy paradigm in Mexico. As mentioned before, a neoliberal paradigm was well established in the following decade. Fox's administration openly embraced Oportunidades programme, which also enjoyed international recognition, especially by the World Bank and the IADB. In other words, this paradigm was institutionalised at federal level. However, important changes registered in the last decade. These changes were not stimulated by a "radical institutional change nor of a significant alteration in social demand for policy" (Genieys and Smyrl, 2008a: 76). The main impulse came from a different source.

Changes in the social policy realm occurred in particular political context. In 1990s, electoral competition notably increased in Mexico, especially at local level. In 1997, the main Mexican leftist party (PRD, Democratic Revolution Party in English) took power in Mexico City, the capital of the country and one of the most populated

⁶ INEGI (the acronym is Spanish for Instituto Nacional de Estadística y Geografía) is the institution responsible for collection of the national statistical data. CEPAL is the Economic Commission for the Latin American and Caribbean region of the United Nations.

of the world. The new local government promoted a different social policy paradigm to that implemented by the federal government.⁷ Additionally, electoral competition translated into pluralism within the Mexican federal congress. In particular, between 2000 and 2006, the congress had a very plural composition. During this period, this main leftist party had an important representation in the federal congress. More importantly, these political changes involved the arrival of political and policy actors who formulate or support new policy ideas. Eventually, these ideas translated into changes. In particular, there was a reform in the official measurement of poverty. Undoubtedly, this change had important implications.

As proposed by Lister (2004), poverty definitions are common source of controversy, since they imply both political and social scientific struggles (Lister, 2004: 13). This has definitely been the case in Mexico. The official definition and measurement of poverty established in 2002 received important criticisms. One of these critiques is that the poverty threshold is very narrow, which almost equals poverty to starvation (Boltvinik & Damián, 2003; Boltvinik, 2002a; 2002b). In addition, this definition of poverty is considered to be in tune with an instrumental vision of social policy (Boltvinik & Damián, 2003; Boltvinik, 2002a; 2002b). One of them main critics of the federal government's social policies has been Julio Boltvinik, a renowned researcher, specialist in poverty and development. Overall, before 2000, academic circles were the main forum for those critiques.

In a context of political plurality, the federal congress also became a forum in which this debate took a special character. This debate reflected the existences of different paradigms of conceiving social policy in Mexico, which were backed by different groups of actors. The most prominent groups can be roughly identified with two opposite political parties. On one side was the left-wing group, which promoted a human-rights based approach of social policy, and was linked to the main Mexican left-wing political party (PRD). On the other side was the right-wing group, which was in line with the neoliberal paradigm implemented by the federal government, and was linked to the right-wing and ruling party (PAN).

At the same time, these groups within the congress had also links with people within local and federal government as well as with particular academic groups. In the case of the left-wing group, the most important connection was made with actors within Mexico City's government and academics such as Julio Boltvinik, who was also member of the federal congress between 2003 and 2006. The right-wing group was mainly identified with actors within the federal government, including the Ministry of Social Development. This ministry, in turn, had close links with the experts of the Technical Committee for the Measurement of Poverty. Therefore, this debate had an important academic character.

⁷ In 2000, Mexico City's assembly passed the local Social Development Law, which is based on human rights perspective.

In this context, the congress became scenario of the discussion of new policy ideas concerning the definition of poverty in Mexico. Between 2000 and 2003, within the Chamber of Deputies and the Senate, members of the three main political parties (PAN, the right-wing; PRD, left-wing; and PRI, the former ruler party at federal level) launched their proposals to regulate the design of social development programmes (Valverde, 2004). These proposals were the basis for the General Law of Social Development (GLSD) (Ley General de Desarrollo Social, in Spanish) which was published in 2004. One of the most important features of this law was the inclusion of new guidelines to measure poverty, which replaced the previous methodology. This replacement constituted a significant change in the way poverty was defined and measured, and which underpinned the potential inclusion of other social policies apart from focalised or CCT programmes.

This law materialised after an intense debate. There were however important coincidences between the proposals of the PRD and PRI (Valverde, 2004). One of the main advocates and author of the proposal promoted by the PRD was Julio Boltvinik, who was member of the federal congress between 2003 and 2006. In general terms, these two political parties (PRD and PRI) advocated for a law inspired in a human-rights based approach, in which government has the responsibility for guaranteeing social rights, while the right-wing party's proposal was essentially based on neoliberal approach in which focalisation was preferred as the principle to design social policies (Valverde, 2004; Boltvinik, 2006).

At the end, the GLSD acknowledged the universality of the social rights of Mexicans, which are also enshrined in the Mexican constitution. The social rights recognised in the GLSD are: education, health, nutrition, housing, the enjoyment of a healthy environment, employment, social security and non-discrimination. The law also established that one of the objectives of social policy is precisely to promote the conditions that ensure the enjoyment of social rights of individuals and groups. In addition, the GLSD established the creation of an independent organisation devoted to applying the official criteria for measuring poverty in Mexico. This organisation was created in 2005 and is called the National Counsel for the Evaluation of the Social Development Policy (Consejo Nacional de Consejo Nacional de Evaluación de la Política de Desarrollo Social, CONEVAL, in Spanish).

As far as the measurement of poverty is concern, the GLSD included a multidimensional perspective of poverty, which became the basis for a new official methodology for measuring poverty in Mexico. This methodology includes several indicators, apart from income, such as access to education and healthcare services, social security, access to food, and quality of housing, and the degree of social cohesion. According to this new methodology, a person is considered to be in poverty when his/her income is insufficient to acquire the goods and services required to meet his/her needs and the person also is lacking with respect to at least one of the following six indicators: education, access to health services, access to social security, quality of housing, basic services in housing and access to food.

The approval of the GLSD shows that policy actors who held different views from those dominant in the executive branch of the Mexican Federal government finally won an important battle in the struggle over the conceptualisation of poverty. Nonetheless, this struggle continued over the following years. Despite the regulations established by the law to measuring poverty, it took a few years to make this change a reality. CONEVAL did not publish individual poverty rates based on such indicators until December 2009. Moreover, although CONEVAL used different factors for measuring poverty apart from income, applied narrow or minimalistic criteria to define the thresholds of most of those factors, such as education and quality of housing (see Boltvinik, 2010). In other words, actors within federal government use their resources, including their institutional position and attributions, to influence the final result of the criteria established by the law. This means that the initial battle originated during the formulation of the definition of poverty was also moved to the implementation stage.

Furthermore, this battle over the establishment of official criteria was also present during the formulation of additional regulations related to the implementation of the law. In January 2006, the President Fox published a decree to regulate the General Law of Social Development. In particular, this decree included regulations related to, among other things, the definition and measurement of poverty. These regulations meant to be in accordance with the previously enacted General Law of Social Development. Nonetheless, some articles of this ordinance were highly controversial. According to some critics, such as Julio Boltvinik, the regulations contravened to the spirit of the GLSD, as implicitly favours a particular type of social policies to attend poverty: focalised programmes (Boltvinik, 2005; 2006). One of the most divisive parts of that decree was that proposed as general requirement that the rules of operation of all federal programs must identify the criteria of eligibility to select benerficieries, as well as the requirements of the potential beneficiaries and their co-responsabilities in order to be part of a given programme. These rules assume that all programmes should be focalised (Boltvinik, 2005; 2006).

Therefore, according to the critics, the regulations disregard that some social programmes can be universal and/or may not have a conditional character. By doing this, regulation implicitly tries to establish the focalisation model into a general norm (Boltvinik, 2005; 2006). For this reason, in March 2006, the Chamber of Deputies promoted a constitutional controversy asking the Mexican Supreme Court to

determine if the aforementioned decree was constitutional, or whether it violates applicable laws. This initiative was backed by the main left wing political party (PRD) and the PRI; actors within these parties manages to build a political coalition to promote this controversy.

At the end, the Supreme Court finally favoured the position of the Federal government. Therefore, the decree to regulate the GLSD was endorsed. The main argument behind the Supreme Court's decision was that although social rights are universal, actions to address them are inevitably targeted (de la Torre, 2008). Thus, the performance of this veto actor at the federal level (the Supreme Court), played a critical role in determining the final phrasing of the regulations related to the definition of poverty (and the appropriate policies to tackle it) in Mexico.

5. An ideational approach to understand social policy change in Mexico

As pointed out along this paper, the existence of conflicting policy ideas held by contending policy actors provided us key insights to understand policy change in Mexico. This brief account of the evolution of anti-poverty policy at federal level informs about the role of the conflict among different key policy actors. In particular, this study shows the existence of two contending groups; one of these wished to alter the current policy system (e.g. neoliberal paradigm), while the other supported the status quo. These two groups contending over the definition of poverty seemed to fulfil the main conditions which enable them to encourage change or continuity: resources (mainly access to power, but also coordination at given juncture), to be integrated around specific policy ideas, and the purpose to gain authority. Indeed, the struggle over authority to determine the adequate definition and measurement of policy was a key factor of policy change in Mexico.

Overall, the introduction of a multidimensional measurement of poverty shows that the actions of contestants of the dominant neoliberal paradigm successfully advanced new policy ideas. Nonetheless, this battle has developed in given institutional and political context. One of the main features of this political context is the increasing political competition at federal and local levels. In particular, since 1997, the ruling party has lost the majority in the congress. Additionally, the left wing increased it political weight within the congress during these years, in particular between 2000 and 2006. The special juncture provided a favourable scenario to pass the GLSD, as well as to promote a constitutional controversy by the PRD and PRI, which that defy the policy ideas backed by the Executive. However, other political factors intervened in this struggle during the formulation and implementation stage of the official definition and measure of poverty. For instance, after the establishment of the GLSD, the performance of another veto actor within the federal level, the Supreme Court, played a critical role in determining the final phrasing of the controversial regulations related to the definition of poverty in Mexico.

This study focused on the struggle over the definition of poverty that took place during last decade in Mexico. However, the role of the struggle among a relatively small number of elite actors for legitimate authority has previously been an important factor of policy change. As mentioned before, the introduction of the neoliberal paradigm in the social policy realm was also subject to dispute within the federal government. In the case of the introduction of the CCT strategy, the technocratic group succeed in implementing their policy ideas, overcoming their critics at different stages.

In the case of the conflict overt the definition of poverty reviewed in this study, the groups of policy actors that promote change can be roughly cast as programmatic elites (Genieys and Smyrl, 2008b: 9-10), in the sense that they constitute a group of actors with direct access to policy-making positions and which is self-consciously structured around a common commitment to a concrete policy ideas. In the case of the technocratic group that promoted a neoliberal paradigm during the nineties, the existence of a programmatic elite that effectively advance their ideas for a significant period of time was clear. These actors seemed to be self-consciously structured around a common commitment to a concrete reform programme.

Nonetheless, policy actors may not necessarily act in a coherent and compacted way as suggested by Genieys and Smyrl (2008a; 2008b), or not for long time. Further research is needed to understand the constraints on actor's ability to be effective agents of change at a given context. In the case of Mexico, further research is needed to better elucidate the extent and resources of the left-wing groups to perform as effective collective actors (e.g programmatic actors) to promote further reforms at federal level. Nonetheless, at a given juncture, they behave as programmatic elites in the sense that they fought for making their policy ideas a reality. In other words, they competed for authority over policy with other elite groups within the state, as such they become agents of endogenous policy change in "the absence either of radical institutional change or of a significant alteration in social "demand" for policy" (Genieys and Smyrl). Finally, further research is needed to know more about the specific characteristics of the groups at federal level, which may have the resources and above all the motivation to actually promote further policy changes that may involve a paradigm shift (as it was the case during the 1980s).

6. Concluding remarks

The way poverty is defined is an important indicator the nature of the policy solutions implemented to tackle this problem. Accordingly, changes in the definition of poverty have significant policy and political implications. This brief account of the evolution of the poverty paradigm in Mexico allows us to observe that some reforms have taken place during this time. The arrival of new policy actors into key positions within the federal and local governments, in particular Mexico City, who held different ideas, supported a new approach for defining and measuring poverty at federal level. This change can be considered to be rather modest in practical terms, as it does not imply a radical change of the neoliberal paradigm at federal level. Nonetheless, this is a relevant change in the way poverty is defined and measured in Mexico, and which proves that dissident voices within the government can encourage important reforms.

Furthermore, this account of the evolution of anti-poverty policy in Mexico informs about the role of the conflict among different policy actors as a key factor to explain of policy change and continuity. However, this battle has evolved in specific institutional and political contexts. At federal level, at the beginning of the nineties, two different groups disagreed over the best approach to tackle poverty. At the end, the technocratic group won the battle. In this case, this group effectively act as programmatic elite. In the following years, the neoliberal paradigm was consolidated at federal level. Nonetheless, along with the increasing political pluralism at federal and local level, new key political and policy actors emerged, particularly at local levels, who have defied the prevalence of such a paradigm.

In short, the evolution of social policy seems to be pushed in an important degree by the conflict among state elites. Further research is needed to elucidate the extent in which particular groups of actors can act collectively as programmatic actors, as proposes by Genieys and Smyrl (2008a; 2008b) in the context of Mexico. Following these authors, in Mexico, the implementation of a comprehensive social policy reform may involve not only power but the eagerness and political will to effectively fight to implement new policy ideas.

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