DOI: http://dx.doi.org/10.22185/24487147.2018.98.39

What do marginal communities that generate structural poverty look like?

¿Cómo son las comunidades marginales que generan pobreza estructural?

Susana Herrero-Olarte

Universidad de Las Américas (UDLA) en Quito, Ecuador

Abstract

The aim of this research was to determine whether marginal comunities could be defined as such in the rural areas of low- and medium-income countries with highly scattered populations. A comparative analysis of poverty indicators between such communities and national averages made it possible to conclude that the proposed definite was indeed appropriate. The poverty levels recorded call for specific, immediate interventions by those responsible, in order to modify the conditions that have led to what is now structural poverty. Given the similarities in living conditions and other indicators for these communities, the response strategy could rely on a proposal of either regional or global intervention geared to addressing the main needs detected.

Keywords: Rural development, marginalization, marginalized communities, eradication of poverty, quantitative and qualitative poverty.

Resumen

En esta investigación se pretende comprobar si las comunidades marginales se definen como aquéllas en el ámbito rural de países de ingreso medio y bajo localizadas en zonas poco aptas para la agricultura con elevadas tasas de dispersión poblacional. El análisis comparativo de los indicadores de pobreza entre las comunidades y los promedios nacionales permite concluir que la definición propuesta es la adecuada. Los niveles de pobreza registrados ameritan intervenciones específicas e inminentes por parte de los titulares de obligaciones capaces de modificar las condiciones que llevan enquistando una pobreza que es ya estructural. La estrategia podría apoyarse en una propuesta de intervención regional o global por la similitud entre los indicadores de las comunidades, con condiciones de vidas similares, capaz de atender las principales necesidades detectadas.

Palabras clave: Desarrollo rural, marginación, comunidades marginadas, erradicación de pobreza, pobreza cuantitativa y cualitativa.

Introduction

The analysis of poverty has historically focused on the lack of economic resources, which prevents the purchase of necessary goods to satisfy basic individual and family needs. This notion is a general definition of quantitative poverty. Individuals whose incomes were lower than a previously defined parameter were defined as poor. Subsequent analysis led to the notion of qualitative poverty, which alludes to unmet needs. Individuals facing suboptimal conditions regarding health, education, and so on were defined as poor.

Thus, when considering quantitative and qualitative poverty, the challenge is to try to reduce poverty in the short term and eliminate it in the long term through policies designed and developed by bond holders. These policies must be adapted to the different contexts that generate poverty so that they are effective, can generate the required impact, and are viable and sustainable over time.

From the study of inequality and unmet human needs arises the concepts of marginalization and exclusion, which draw attention to the living conditions prevalent in certain places and that irretrievably produce poverty.

This research aims both to identify the characteristics of marginalized communities to locate and understand them and to invite the relevant bond holders to design and implement policies to eradicate the poverty that these communities generate.

Marginalized communities are located in the rural areas of low- and middle-income countries, which, in general, have the worst indicators in terms of quantitative and qualitative poverty at the national, regional, and global levels. Given that agriculture is one of the fundamental sources of income, if climatic and environmental conditions limit agricultural productivity, generating income and, thus, overcoming quantitative poverty becomes difficult. In addition, communities with high dispersion indexes receive less investment from authorities and have less access to public services, which translates to lower qualitative poverty indicators. This lower investment is a response to its low profitability for the political class because the results of the investment translate to a minimal number of votes for the few people who can benefit from dispersion conditions.

According to the above discussion, marginalized communities are those in low- and middle-income countries in rural areas located in regions that are unfit for agriculture and that face dispersed conditions.

To understand the quantitative and qualitative poverty data of marginalized communities based on this definition, we have utilized primary information obtained from 53 marginalized communities of 11 low- and middle-income countries given the little secondary information available. The results of interviews and surveys of the families living in these communities and of managers and technicians at the non-governmental organizations (NGOs) working in these types of communities were compared with national averages.

In all cases, the data measured in these communities were worse than the national averages. The difference in the case of quantitative poverty indicators was 56%, and that in the case of qualitative poverty indicators was 35%. According to the interviews conducted, past generations exhibited very similar indicators. The data were very similar across communities, with a 5% difference, on average, between the best and worst indicators recorded.

Poverty and marginalization: concepts and characterization

Classical economists, such as Smith (Heilbroner, 1976), Ricardo (ed. Sraffa, 1986), and Malthus (Malthus, 1846), partly focused on the study of poverty, which was generally understood as a consumption level that does not ensure livelihood. Booth (1889) performed the first quantitative analysis with comparisons over time. Merton (1938), Stouffer et al. (1949), Merton et al. (1950), and Davis (1959) delved into the idea of variations in the perceived deprivation of an individual with respect to the group from a sociological perspective. Runciman (1996) transferred developments in the theory of deprivation, understood as the impossibility of providing "something" to some or all of the group to which an individual belongs, to the economic sphere. The definition of this "something" generated two schools of thought, leading to the study of quantitative poverty, as was previously understood, and that of qualitative poverty, which had been outlined before but gained strength moving forward. In addition, the definition of the needs that individuals had to satisfy to determine this "something" that should cover these needs was set.

In what would later be known as the dominant economic approach to poverty, or quantitative poverty, some authors chose to consider money as the "something" that an individual in poverty did not have. The needs to be covered were, in general, the most basic needs related to livelihood and, especially, to food. Their analysis resulted in several systems to establish the limits that define poverty, although the most known and used are absolute and relative poverty. Absolute poverty is the minimum daily income needed to survive, whereas relative poverty establishes a minimum daily income to buy a market basket of national or regional goods and services. Traditionally, organizations such as the World Bank (Banco Mundial, 2016) and the European Union have relied on the study of absolute poverty, whereas the United Nations Economic Commission for Latin America and the Caribbean (ECLAC or, in Spanish, CEPAL), the Central Intelligence Agency (CIA), and the United Nations Development Program (UNDP) use more data on relative poverty. However, different agencies are increasingly referring to both methodologies to achieve a more comprehensive and realistic global overview regarding poverty.

In contrast, other analysts laid the foundations for understanding qualitative poverty by considering that the "something" that poor individuals needed was not necessarily money given that empirical studies showed an inverse relationship between income and quality of life (Streeten et al., 1981). The study of the different types of needs and priorities of individuals was reinforced after studies questioned the existence of a rational, maximizing, knowledgeable human with perfect foresight (Thaler, 1988, Henrich et al., 2001), putting in doubt the prioritization of people's need to always seek economic and individual benefits. The study of human needs continued to develop from the social sciences (Maslow, 1943, Fromm, 1956, Wiggins et al., 2002), recovering somewhat from the economic work on the subject of Karl Marx (Márkus, 1974, Heller, 1978) and highlighting the contributions of Townsend (1979), who underpinned the generation of a new theory by equating human needs to participate in ordinary life patterns, such as a diet or way of dressing. Glaser and Strauss (1967) systematized the first models in this regard.

The work of Sen, an economist also recognized for oscillating between sociology and philosophy, which were fundamental disciplines for the development of thought around qualitative poverty, deepened the concept of qualitative poverty and served as a definitive reference on the subject. The author considered that the existence of goods and services was necessary but that access to them, that is, ownership and the right to consume them, store them, and so on, was important. Once an individual has ownership, he must be able to use a good or service. The operations are the states in which an individual is found to have ownership, indicating his level of welfare

(Sen, 1982a, 1984, 1985). Thus, for Sen (1990), poverty is the state in which options are denied to an individual, meaning that it limits an individual's ability to have and do whatever he wants. It reduces functioning and the means to achieve goals and, thus, equates freedom with capacity (Sen, 1999).

Undertaking the evaluation of an individual's different options generates endless combinations of indicators to consider poverty from a qualitative or multidimensional point of view. In fact, it becomes a subjective concept that is conditioned by the individual's own perception and that also depends on his environment (Wiggins, 2002). Poverty is therefore a dynamic issue, with indicators that are difficult to choose and, especially, to measure. Among the reference indicators, the Human Poverty Index (HPI), created by the UNDP in 1997, values life expectancy, literacy, access to water, and nutrition, and the Multidimensional Poverty Index (MPI), presented in 2010 by the UNDP and the Oxford Poverty & Human Development Initiative, includes parameters of education, health, and possession of material goods (Kovacevic and Calderon, 2014).

Increasingly, the study of qualitative or multidimensional poverty has been complemented by quantitative work to generate measurement systems capable of using the tools of both systems, offering data that reflect reality to a greater extent. In their evolutions, quantitative and qualitative poverty have converged on indicators such as the HPI-2, an evolution of the HPI that includes per capita income per family and intimately related concepts, such as social exclusion and marginalization.

When considering the variables that lead an individual to quantitative or qualitative poverty, it is necessary to consider the concepts of marginalization and exclusion.

In sociology, marginalization was linked to migration and viewed as a lack of adaptation or cultural belonging (Thomas and Znanieckian, 1918, Park, 1928). Attention was then also directed towards nationals and their possible conditions for marginalization (Green, 1947-48, Golovensky, 1951-52). In their relationship with the economy, the marginalized were those that did not actively generate networks that produce wealth and social recognition (Massé, 1965, Lenoir, 1974), that were never part of these networks (Geremek, 1991), or that ceased to be part of these networks (Castel, 1998). Other considerations of marginalization positioned an individual as a passive entity who did not participate in the social evolution of the group (DESAL, 1969), did not address his problems, did not change his reality, and had no political organ to represent him (Giusti, 1973).

This individual was then discriminated against because he was not treated equally to other citizens (UNESCO, 1960), had no access to universally recognized rights (Minujin, 1998), or was used as a reserve to put downward pressure on wages (Cardoso, 1970).

An assessment arose in parallel that did not consider marginalization as a characteristic of an individual but rather was directly related to where he lived. A marginal zone is one that has not achieved the structures, norms, or values of modernity. It is a place where the benefits of development have not yet arrived, limiting an individual's opportunities (Barros et al., 2008). This notion is considered by the National Population Council (CONAPO) and the Education, Health, and Food Program (PROGRESA), which seek to measure the benefits of development, opportunities, and freedoms, such as access to basic goods and services. For their analyses, these organizations start from local indicators of education, housing, and income and state dispersion to determine which communities face marginalization, and they invite public authorities to concentrate their work there.

The definition of social exclusion disseminated by the European Union also addresses an individual's location and can generate a multifactorial and subjective structure that describes an individual's status.

Exclusion, whose definition shares fundamental features with that of marginalization, is concentrated in the urban sphere, whereas marginalization, an issue that this study addresses, is particularly relevant to rural areas.

To identify marginalized communities, it is necessary to define the parameters that define a community as marginalized, an issue on which this study aims to shed light. Bond holders can identify the groups that have structural difficulties getting out of poverty because of the places where they live and can observe the worst indicators in rural areas.

In this research, it is assumed that marginalized communities are population groups located in rural areas of low- and middle-income countries, which is generally accepted, and that fulfill two characteristics: it is very difficult for people to generate income in these communities and public investment is very limited or non-existent.

For these two characteristics to define marginalized communities, three conditions must be met. The indicators of quantitative and qualitative poverty in these communities should be substantially worse than national averages and must have been similar or worse for previous generations, which characterizes a structural issue. In addition, the indicators should be similar among such communities worldwide, suggesting that marginality generates similar results regardless of where it is considered. Finally, in this study, the needs that are identified as priorities by families in the communities are identified to begin the process of designing the strategies to be developed.

The difficulty of generating income has been considered a characteristic of marginalized communities because it limits the capacity to improve indicators of qualitative poverty. Given that the primary source of income is primary production, it is necessary to focus on the conditions that generate the lowest income from agricultural production. Olarte (2017) brought attention to the lack of ownership of land and small lots and the lack of machinery and workers and pointed out the difficulty of commercializing agricultural production. All three issues can be addressed with sufficient economic and technical resources.

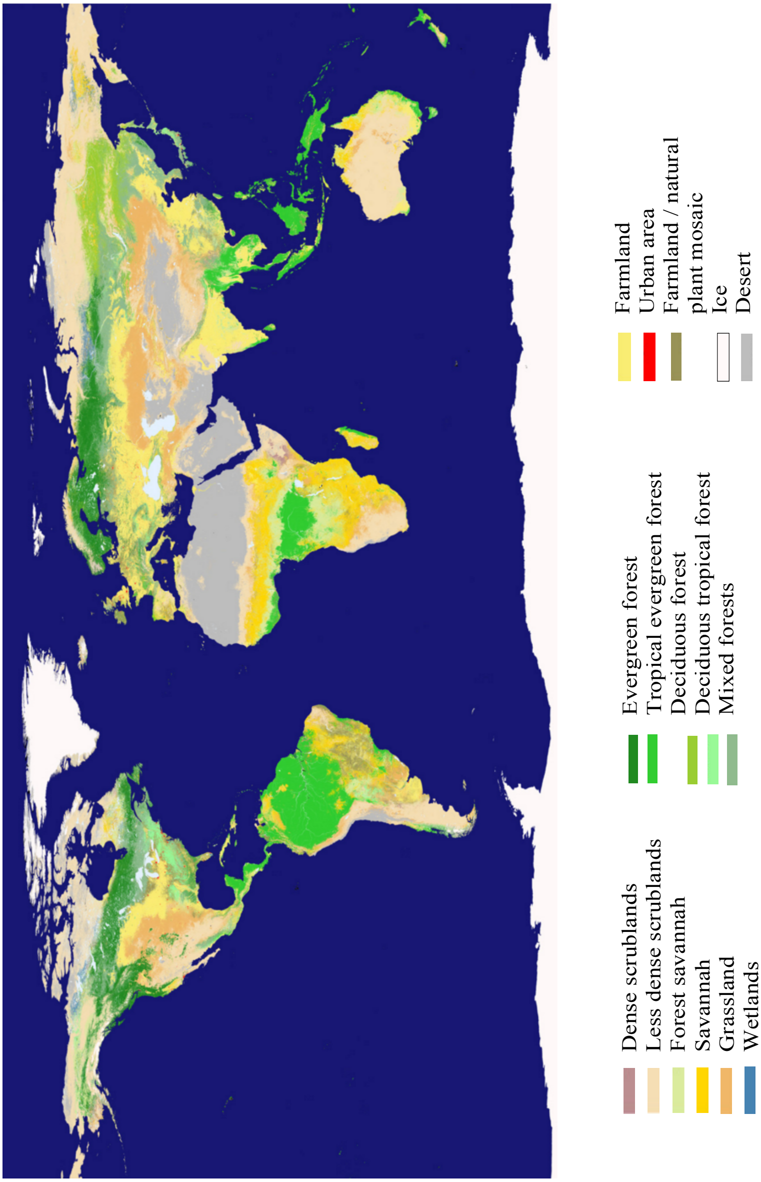
Adverse environmental and climatological conditions limit income from agricultural production and are difficult to overcome, preventing communities from reaching optimal levels of productivity. It can be considered that such conditions arise in the jungle, forests, deserts, and frozen areas, which, as shown in Figure 1, cover a substantial part of the globe. Morphological land issues, such as steep slopes and altitude plains, should also be considered.

Sebastian (2009) found that 770 million people, representing 30% of the rural population, lived in areas unsuitable for agricultural production. Of these, 65% were located in Asia, and 20% were located in sub-Saharan Africa.

In addition to their locations in rural territories and low levels of agricultural productivity, marginalized communities are also characterized by low population densities, which can be equated to limited public investment. When the population is low, public investments do not offer the performance level that public authorities seek to the extent that such investments do not translate to the expected number of future votes. The lack of public investment, which leads to poor public health and education systems, implies limited opportunities to overcome qualitative poverty indicators.

Sebastian (2009) equated the state of population scarcity to the condition of isolation, which, in turn, was equated to the distance from the nearest market. Specifically, an area was defined as isolated if it was more than two hours from the nearest market, as very highly isolated if it was four to eight hours from the nearest market, and as extremely isolated if it was more than eight hours from the nearest market.

Figure 1. Uses of the Earth's soil



Source: NASA, 2016

Sebastian (2009) found that two-thirds of agricultural producers in low- and middle-income countries, that is, 1.7 billion people, faced marginalization and isolation. Smale and Alpert (2009), using the same criteria, defined an individual as neglected by nature when he was located in an area of low agricultural productivity and as neglected by man when he was far from the nearest market. According to their estimates, 20% of the agricultural population of low- and middle-income countries, that is, an estimated 542 million people, was neglected by nature and man in 2008.

Defining a lack of public investment as the distance to the nearest market means that each case must be measured individually to check if it meets the criteria. This study instead considers population dispersion as a measure of the lack of public investment owing to a government's reduced interest in investing in public services in less densely populated regions given the few votes expected in exchange. It is then necessary to define the condition of dispersion and its measurement.

The condition of dispersion can be defined as fewer than 14 inhabitants per square kilometer, the global average population density.

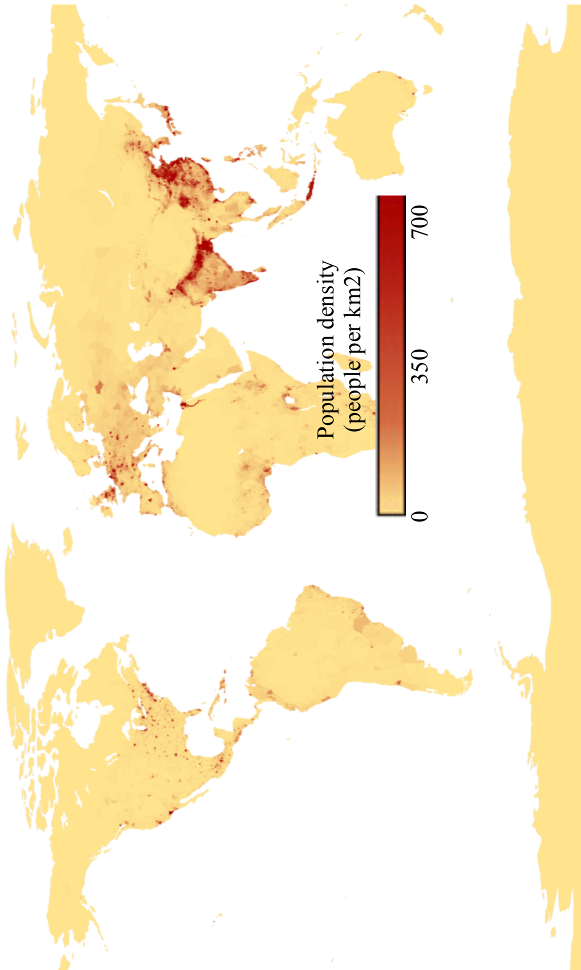
Figure 2, offered by the National Aeronautics and Space Administration (NASA), presents a map of world population density.

To validate that the characteristics of marginalized communities have been properly selected, it is necessary to verify that the indicators of quantitative and qualitative poverty are worse in these communities, that they feature structural poverty that is inherited generation after generation, and that the data are similar across these communities. Such findings would allow us to conclude that, in rural areas, population groups in regions that are unfit for agriculture and are dispersed have little or no opportunity to overcome poverty.

Methodology for the analysis

To compare quantitative and qualitative poverty indicators to the national averages, primary information obtained from 2009 to 2014 was used in the frame of the work developed together with the Foundation CIDEAL of Investigation and Cooperation, which yields the use of the primary information to be treated in the present work. Data from the communities were obtained from Mexico, Guatemala, Dominican Republic, Haiti, Ecuador, Peru, Colombia, Mali, Niger, Senegal, and Vietnam, all of which are low- and middle-income countries. Across these countries, 53 rural communities were visited. The average population of each community was 56 people.

Figure 2:. Global population density



Source: NASA, 2016

All communities were in areas unfit for agricultural production, including savannahs, evergreen tropical forests, high plains, steep slopes, and areas with quarterly floods. In all cases, the dispersion was below 12 inhabitants per square kilometer, with an average of 10 inhabitants per square kilometer. Table 1 shows the details of the data used.

In the selected communities, 37 interviews were conducted, 10 of which were in depth, and 256 people were surveyed. The surveys were used to obtain poverty data for the communities and compare these data with the national indicators and across similar communities in the different countries studied. The interviews were used to obtain qualitative data about the living conditions of previous generations to assess the structural conditions and perpetuity of the data obtained. More than half of respondents were women. The average age was 39 years. We conducted 23 interviews with the directors or coordinators of 13 organizations working in marginalized communities, and we distributed 51 surveys to technicians. Details are provided in Table 2.

Several indicators of quantitative and qualitative poverty were identified and compared with the national averages of each country and the global average. The parameter selected to assess quantitative poverty was income. To analyze qualitative poverty, indicators of education, health, and the possession of goods were observed, following the characteristics used for the aforementioned MPI.

Although we analyzed a range of widely available literature, we preferred to have a common and homogeneous source, such as the World Bank database, to obtain national and global data for the selected countries (Banco Mundial, 2016).

The next section provides comparative data from the communities and at the national and global levels for the selected quantitative and qualitative poverty parameters as well as data on the persistence of poverty.

Quantitative and qualitative poverty indicator comparisons for marginalized communities

Figure 3 shows the differences in the data on quantitative poverty. In all cases, poverty was lower at the national level when compared to that found in the marginalized communities in each country. In terms of the number of people below the poverty line, the levels were very similar across the marginalized communities.

Table 1. Characteristics of the marginalized communities selected for analysis

Country	Country income level	Communities	Community population (average per community)	Children (average per family)	Reason for limited agricultural capabilities	Dispersion
México	Medium-high	3	75	4	Savannah	12
Guatemala	Medium-low	4	103	5	Forest	14
Dominican Republic	Medium-high	8	23	3	Savannah	11
		6	86	5	Forest savannah	10
Haiti	Low	4	36	4	Savannah	13
Colombia	Medium-high	3	53	5	Tropical evergreen forest	15
Ecuador	Medium-high	5	56	6	High elevation plain	10
		4	25	4	Slope	11
		3	106	3	Tropical evergreen forest	12
Perú	Medium-high	2	59	5	Savannah	10
Mali	Low	2	49	6	Savannah	11
Niger	Low	2	55	4	Savannah	15
Senegal	Medium-low	2	29	4	Savannah	16
Vietnam	Medium-high	5	35	3	Floods	12
		53 (total)	56 (average)	4.3 (average)		

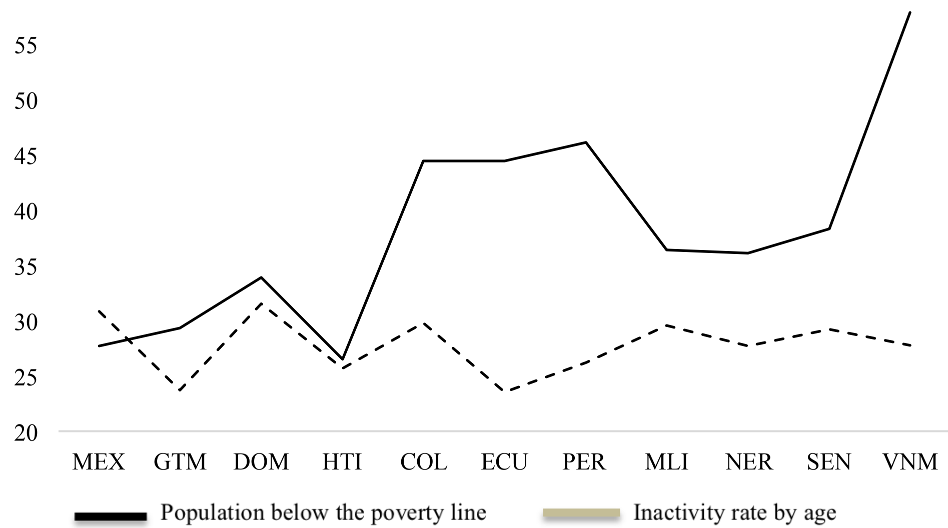
Source: Created by the author

Table 2: Details of interviews and surveys of marginalized communities and NGO teams

Country	Interviews in marginalized communities	Surveys in marginalized communities	Women (%)	Average age	NGO managers interviewed	NGO technicians surveyed
México (MEX)	4	28	60	35	2	3
Guatemala (GTM)	4	32	55	32	2	3
Dominican Republic (DOM)	2	30	48	39	1	4
	2	15	60	38	2	3
Haiti (HTI)	3	15	70	33	1	4
Ecuador (ECU)	5	55	63	42	3	5
	3	17	61	53	2	2
	3	5	59	49	1	3
	2	15	48	48	1	4
Perú (PER)	2	10	46	35	2	3
Colombia (COL)	1	4	60	49	1	4
Mali (MLI)	1	7	85	32	1	3
Niger (NER)	1	3	61	39	1	2
Senegal (SEN)	1	5	75	29	1	4
Vietnam (VNM)	3	15	60	38	2	4
	37 (total)	256 (average)	61 (average)	39 (average)	23 (total)	51(total)

Source: Created by the author

Figure 3: Population below the poverty line and inactivity rate (difference in the absolute value of marginalized communities and the national average, 2013)



Source: Surveys and interviews conducted in marginalized communities and the World Bank database (2016)
NOTE: The available national data of the population below the poverty line in the World Bank database (2016) are from 2012 for Mexico, Haiti, and Vietnam; from 2011 for Guatemala and Niger 2011; from 2010 for Senegal; and from 2009 for Mali.

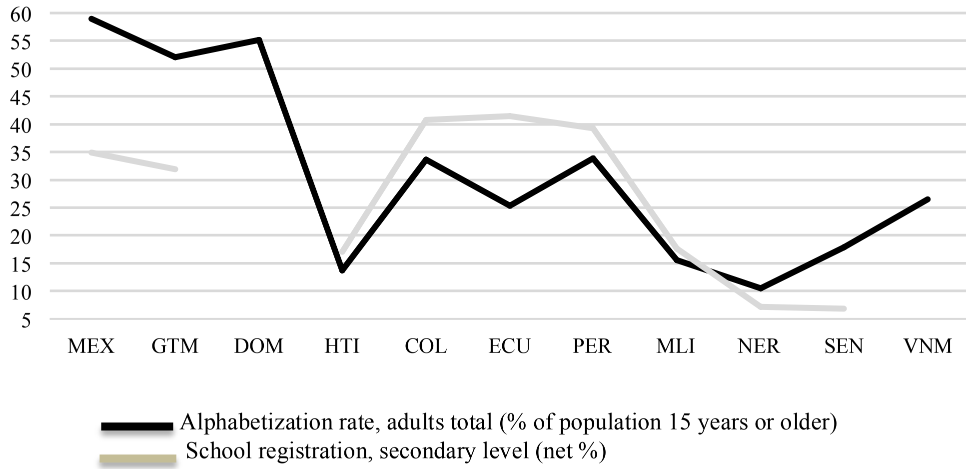
The differences from the national averages therefore depended on the country averages, which indicates that the countries that reduced their poverty rates did not see similar results for their marginalized rural groups. In the case of the inactivity rate, the difference was similar across all countries. In low-income countries, such as Haiti, Mali, Niger, and Senegal, the percentages of active people were especially low due to the low productivity of the land and the limited job opportunities, but the national averages were also lower accordingly. In the case of middle-income countries, the data from marginalized communities were better than those of communities in low-income countries because of the employment opportunities offered by the closest urban or rural cores with the greatest densities. As national data are also better for middle-income countries, we find similar differences to those observed for low-income countries.

To carry out the qualitative analysis, data on education, health, and available goods were collected. In all cases, as in the previous examples, the indicators imply that poverty is lower at the national level when compared with the averages in the marginalized communities.

Figure 4 shows the differences in the field of education. When considering adult literacy, the greatest differences between the national averages and the data for marginalized communities are observed in countries with the best performance at the country level, such as Mexico, Guatemala, Dominican Republic, Colombia, Ecuador, Peru, and Vietnam. The remaining countries, Haiti, Mali, Niger, and Senegal, which have the lowest performance at the country level, do not exhibit substantial differences between the national averages and the indicators observed in the marginalized communities. When assessing the difference between the national average enrollment in secondary school and that observed in the marginalized communities, greater differences are again seen in the countries with the best performances. Again, the difference is greater in Haiti and the African countries. The data observed are similar across the marginalized communities, with an average difference of 5% between the highest indicators, observed in Ecuador, and the lowest ones, observed in Niger.

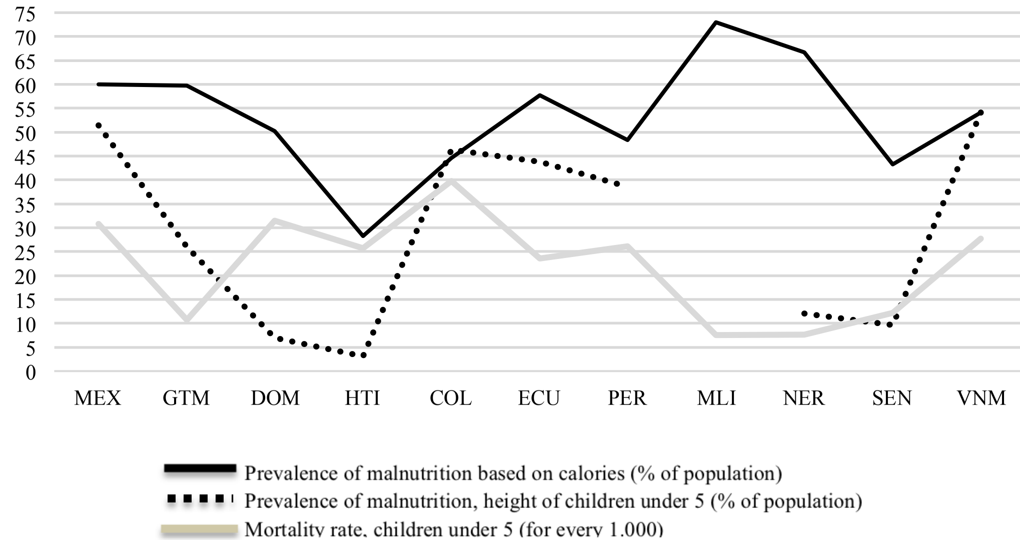
Figure 5 analyzes the comparison of health conditions by assessing three reference indicators: the prevalence of malnutrition based on calorie intake, the prevalence of malnutrition based on children's height, and children's mortality rate.

Figure 4: Adult literacy rate and enrollment in secondary school (difference in the absolute value of marginalized communities and national averages, 2013)



NOTE: The available national data on the total adult literacy rate in the World Bank (2016) database are from 2012 for Mexico and Haiti, from 2011 for Niger, from 2010 for Senegal, and from 2006 for Senegal.
The available national data on the enrollment rate in secondary school (%) in the World Bank (2016) database are from 2012 for Peru and Niger, from 2011 for Colombia and Mali, from 2010 for Senegal, from 2009 for Vietnam, and from 2006 for Dominican Republic. Data are not available for Dominican Republic and Vietnam.
Source: Surveys and interviews conducted in marginalized communities and the World Bank database (2016)

Figure 5: Prevalence of malnutrition based on calories and height and infant mortality rate (difference in the absolute value of marginalized communities and national averages, 2013)



NOTE: The available national data on the prevalence of malnutrition considering the height of children under five years of age in the World Bank (2016) database are from 2012 for Mexico, Haiti, Ecuador, Peru; from 2010 for Colombia; and from 2009 for Guatemala. Data are not available for Mali.

Source: Surveys and interviews conducted in marginalized communities and the World Bank database (2016).

For malnutrition based on calorie intake, similar patterns are not detected across of countries. For the prevalence of malnutrition, the height of children under five years of age is considered. We find that countries with a black ethnic majority, such as Dominican Republic, Haiti, Niger, and Senegal, have higher averages in general relative to the other countries. In these other countries, the difference between the national average and that of the marginalized communities is greater. Indigenous groups tend to reside in marginalized communities, although these groups are smaller when compared to other ethnic groups. It is then necessary to consider if anthropometric indicators are adequate to assess the differences in the nutritional conditions of the marginalized communities. When analyzing the under-five mortality rate, the differences in the countries that have better starting indicators, such as Mexico, the Dominican Republic, and the three Andean countries, which exhibit greater distances from the community averages, stand out.

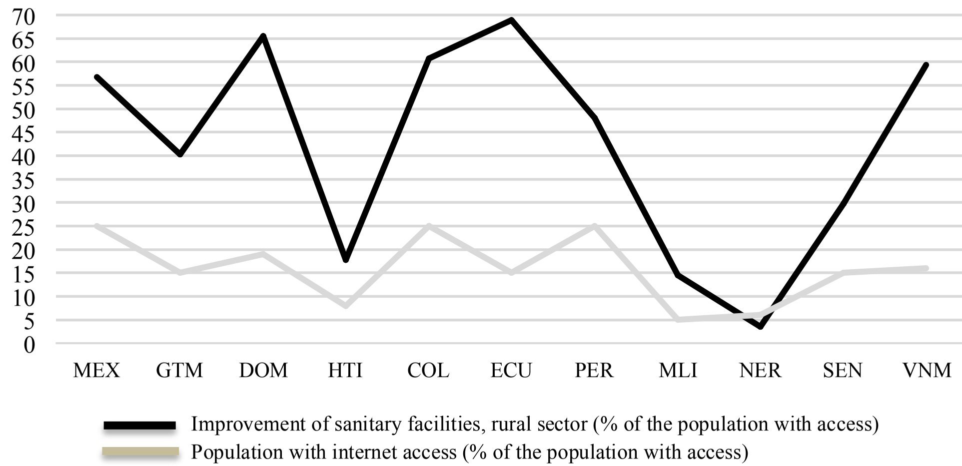
In Figure 6, to carry out the analysis of available goods, we consider data on sanitary facilities and access to the internet. In terms of sanitary facilities, the difference between national averages and data from marginalized communities is greater in countries with better national indicators, such as Mexico, Dominican Republic, Colombia, Ecuador, and Peru. Countries with worse indicators, such as Haiti and the African countries, have almost no internet access in marginalized communities.

In the analysis of poverty, considering its temporal dimension, it is necessary to analyze the extent to which it is inherited, which leads us to consider how these indicators are perpetuated, generation after generation, as structural conditions that are still not overcome. To carry out this analysis, interviews were carried out in the communities with families, managers, and NGO technicians. In 92% of cases, the individuals interviewed believed that their overall living conditions had improved slightly when compared to those of the past generations, although the advances were insufficient.

Given that this study tries to focus on the need to generate specific development policies in marginalized communities to change the structural indicators of quantitative and qualitative poverty, we present an analysis that can be useful to bond holders.

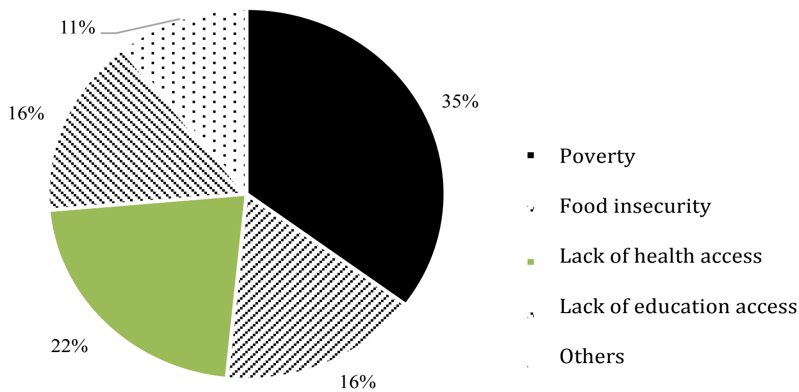
The visits to the communities were used to analyze the needs that families and NGOs prioritize for the responsible parties to handle. As shown in Figure 7, the main problem for 35% of the population was poverty, followed food insecurity for 16% of the population.

Figure 6. Population access to sanitary facilities and the internet (difference in the absolute value of marginalized communities and national averages, 2013)



Source: Surveys and interviews conducted in marginalized communities and the World Bank database (2016)

Figure 7: Needs identified in the sample communities



Source: Surveys and interviews conducted in marginalized communities

For the remaining 36% of the population, the main problems were the lack of access to health and education systems.

Conclusions

Quantitative poverty indicates the number of people living with less money than necessary to purchase the required expenses to live a decent life. Qualitative poverty considers a person who is unable to enjoy certain goods and services as being in poverty. The latest trends in the analysis of poverty show that these terms are not mutually exclusive but rather are complementary, and they suggest including other indicators along with the assessment of income to establish a global vision of the problem.

The issue is that the same poverty indicators can be observed in the periphery of a city or in a remote rural community, and, thus, the definition itself does not allow for the development of the most adequate policies to eradicate poverty. The definitions of exclusion and marginalization do, however, make it possible to locate the physical spaces in which the greatest percentage of people living in quantitative and qualitative poverty reside and to devise more viable and effective strategies to eradicate poverty. Exclusion and marginalization refer to the lack of access to channels for generating income, which perpetuates quantitative poverty, and the lack of access to basic services, which is related to qualitative poverty. The challenge is defining the state of exclusion, a concept related to urban areas, and that of marginalization, a concept related to rural areas.

This study focuses on marginalization and suggests that exclusion be considered in other research, defining the study context as rural areas of low- and middle-income countries. If individuals do not have access to the means to increase their resources, then a fundamental source of income, such as agriculture, does not offer the necessary elements to reach the optimum level of productivity. This situation occurs when a community is located an area that is unfit for agricultural production, such as a desert, a steeply sloping area, a jungle, and so on. Limited public investment coincides with rural communities with high degrees of dispersion because the number of votes that is received later in exchange for such investment is insufficient.

Thus, the definition of a marginal community is a community that is located in a rural area of a low- or medium-income country in an area that is not suitable for agricultural production and that has a high level of population dispersion.

It is necessary to assess quantitative and qualitative poverty indicators in communities with these characteristics to conclude if, as expected, these indicators are especially unfavorable. It is also necessary to verify that the living conditions have been similar for previous generations, which would lead us to conclude that poverty is a structural issue. It is also necessary to consider whether the data are similar across the communities to assess whether similar living conditions generate similar results regarding quantitative and qualitative poverty. To carry out the analysis, the quantitative and qualitative poverty indicators of marginalized communities in eleven countries, which were identified according to the proposed definition, were compared with the national averages of each country.

The results show that, in all cases, the levels of the indicators observed in the marginalized communities were substantially worse than those observed at the country level. The national average indicators of quantitative poverty were 56% higher, whereas those for qualitative poverty were 35% higher. The results were slightly worse for previous generations, allowing us to consider that the marginalized communities experience structural poverty that is especially difficult to change. Based on the data obtained, action in marginalized communities should be prioritized among the holders of related obligations.

The analysis shows that the data are generally similar across communities, regardless of the country and the context and especially for quantitative poverty. It is then possible to consider defining a framework strategy to generate income in these communities that can be used to promote the national and regional development policies of marginalized communities. The framework strategy can be used, adapted, or discarded for country-level analyses of the treatment of poverty in marginalized communities, but it can serve as a basis to address an issue that even bond holders do not know how to address. Based on the needs that the families and NGOs in marginalized communities have prioritized, the strategy to be defined should address the lack of income, food insecurity, and the lack of access to quality health and education systems.

Deepening the data, when considering the indicators of qualitative poverty, the middle-income countries exhibit better performances as a result of the policies developed to provide access to basic health and education services. To a certain, although still small, extent, these communities have been able to benefit from these policies. The absolute data are coherent with the comparison data. In fact, the difference between the registered indicators of qualitative poverty in the marginalized communities and those at the national level is greater for middle-income countries, leading us to believe that marginalized communities have not been part of the development processes followed, although this finding is still inconclusive. It is then possible to consider whether strategies to eradicate qualitative poverty in marginalized communities should aim for development focused in certain centers that attract some of the citizens of these communities or if it is better to take the services to the communities themselves.

Referencias bibliográficas

Abrahamson, Peter, 1997, *Exclusión social en Europa: ¿vino viejo en odres nuevos?*, Madrid. CSIC.

Altimir, Oscar, 1979, La dimension de la pobreza en America Latina, Cuadernos de CEPAL, 27, CEPAL, Santiago de Chile.

Arriba, Ana, 2002, *El concepto de exclusión en política social*. Unidad de Políticas Comparadas. España. CSIC: Documento de Trabajo 02-01. Recuperado de http://www.iesam.csic. es/doctrab2/dt-0201.pdf.

Bamberger, Michael, 2000, *Integrating quantitative and qualitative research in development projects*. Washington D.C.World Bank Publications.

Banco Mundial, 2016, *Base de datos*, Washington: BM. Disponible en http://datos.bancomundial.org/ (Consultado el 15/06/2012).

Bárcena, Martin, 2001, *Privación relativa, bienestar e imposición sobre la renta*. Tesis Doctoral. Málaga. Universidad de Málaga.

Berrebi, Joseph y Silber, Jacques, 1985, "Income inequality indices and deprivation: A generalization", en *Quarterly Journal of Economics*, Oxford.

Bowen, Glenn, 2009, "Document analysis as a qualitative research method. Carolina Del Norte", en *Qualitative research journal*, 9(2), 27-40.

Booth, Charles, 1889, *Life and labor of the people,* vol. 1, Williams and Norgate.

Cardoso, Fernando, 1970, "Comentario sobre los conceptos de sobrepoblación relativa y marginalidad", en *Revista Latinoamericana de Ciencias Sociales*, núms. 1 y 2. Santiago de Chile.

Castel, Robert, 1998, "La lógica de la exclusión" Bustelo, Eduardo y Minujin, Alberto, *Propuesta para sociedades incluyentes*. Colombia. Unicef/Cuadernos Santillana.

Chakravarty, Satya y Mukherjee, D., 1998, "Lorenz domination, utilitarian deprivation rule and equal sacrifice principle", en *The Manchester School Journal* 66, 5, 521-531.

Chakravarty, Satya y Moyes, Patrick, 2002, *Individual welfare, social deprivation and income taxation*. India. Economic Theory.

Charles Booth, 1889, *Labour and life of the people in London*, vol. 1. East London. London: Williams and Norgate.

Davis, James, 1959, "A formal interpretation of the Theory of the relative Deprivation", en *Sociometry*. 20. 280-296.

Desal, 1969, "La marginalidad en América Latina: un ensayo de diagnóstico", en *Cuadernos de Relaciones Laborales*. 23-2. 247-267, Barcelona. Herder.

Ebert, Udo y Moyes, Patrick, 2000, "An axiomatic characterization of Yitzhaki's index of individual deprivation", en *Economics Letters* 68, 263-270

Fromm, Erich, 1956, *Psicoanálisis de la sociedad contemporánea*. México. Fondo de Cultura Económica.

Geremek, Bronislaw, 1991, *Les fils de Caïn*. París. Flammarion.

Giusti, Jorge, 1973, *Organización y participación popular en Chile: el mito del hombre marginal*. Buenos Aires. Ediciones Flacso.

Glaser, Barney y Strauss, Anselm, 1967, *The discovery of grounded theory: strategies for qualitative research*. New York. Aldine Publishing Company.

Golovensky, Vstore, 1951-1952, "The marginal man concept", en *Analysis and Critique*. vol. 30.

Green, A. W., 1947-1948, "A Re-examination of the Marginal Man Concept", en *Social Forces*, vol. 26, 1947-1948.

Heilbroner, Robert, 1976, "Business Civilization", en *Decline by Robert*. New York. W. W. Norton y Company.

Heller, Agnes, 1978, *Teoría de las necesidades en Marx*. Barcelona. Península.

Henrich, Joe *et al*., 2005, *"Economic man" in cross-cultural perspective: Behavioral experiments in 15 small-scale societies*. Atlanta, USA. Department of Anthropology, Emory University, Atlanta.

Hey, Jhon y Lambert, Peter, 1980, "Relative deprivation and the Gini coefficient: Comment", en *Quarterly Journal of Economics* 95, 567-573. Cambridge.

Imedio, Luis y Barcena, Elena, 2002, *Privación status e imposición sobre la renta. Estudios de Economía Aplicada*. España. Asociación internacional de Economía aplicada.

Kovacevic, Milorad y Calderon, Cecilia, 2014, *UNDP's Multidimensional Poverty Index. Specifications*. UNDP.

Lenoir, Rene, 1974, *Les exclus*. París. Le Seuil.

Malthus, Thomas, 1846, *Ensayo sobre el principio de la población*. Madrid. Est. Lit. y Tip. de Lucas Gonzalez y Compañía. Universidad Complutense de Madrid

Márkus, Gyorgy, 1974, *Marxismo y Antropología*. Barcelona. Grijalbo.

Maslow, Abraham, 1943, "A theory og Human Motivtion", en *Psychological Review*, vol. 50. Toronto. York University.

Massé, Pierre, 1965, *L'exclusion sociale*. París. Klenfer.

Merton, Robert, 1938, "Social Structure and Anomie", en *American Sociological Review* 3. United States. vol 3, Issue 5. 672-682

Merton, Robert y Kitt, A.S., 1950, *Contributions to the Theory of Reference Group Behavior*. New York. Glencoe, Ill.: Free Press. Pages 40-105.

Minujin, Alberto, 1998, "Vulnerabilidad y exclusión social en América Latina", en Bustelo, Eduardo y Minujin, Alberto, *Todos entran: propuesta para sociedades incluyentes*. Colombia. Unicef/Cuadernos Santillana.

Moreno, Luis, 2000, *Ciudadanos precarios, la última red de protección social*. Barcelona. Ariel.

Mukherjee, D., 1997, "Deprivation reducing income tax functions", en *Research on economic inequality*, vol. 7, 153-163.

NASA, 2016, *Densidad poblacional*. Disponible en http://visibleearth.nasa.gov/view.php?id=53005, (Consultado el 29/087/2013).

Olarte, Susana Herrero, 2017, "El rol de la sociedad civil en el reconocimiento de la seguridad alimentaria como bien público regional en Latinoamérica", en Revista *Aportes para la Integración Latinoamericana*, (36).

Park, R., 1928, "La migración humana y el hombre marginal" vol. 33 of *American Journal of Sociology*.

Podder, Nripesh, 1996, "Relative deprivation, envy and economic inequality", en *Kyklos* 49, 353-376.

Pradhan, Menno y Ravallion, Martin, 2000, "Measuring poverty using qualitative perceptions of consumption adequacy", en *Review of Economics and Statistics*, Washington. 82(3), 462-471.

Raya, Esther, 2005, *Categorías sociales y personas en situación de exclusión. Una aproximación*. Madrid. Universidad Complutense de Madrid. Recuperado de http://www.redalyc.org/pdf/112/11204704.pdf

Renes, Victor, 1993, *Luchar contra la pobreza hoy*. Madrid. HOAC.

Ravallion, Martin, 1998, *Poverty Lines in theory and practice*. Living Standards Measurentent Study. Working paper núm. 133. Washington. Banco Mundial.

Ricardo, David, 1986, *On the Principles of Political Economy and Taxation*. Editado por Piero Sraffa. Cambridge. Cambridge University Press.

Runciman, W., 1966, *Relative deprivation and social justice*. Londres. Routledge and Kegan Paul.

Sebastian, Kate, 2009, *Mapping favorability for agriculture in low and middle income countries: technical report, maps and statistical tables*. Washington. Oxfam América.

Sen, Amartya, 1982, *Utilitarianism and beyond*. Cambridge. Cambridge University Press.

Sen, Amartya and Dreze, J., 1990, *The political economy of hunger*. Oxford. Oxford: Clarendon Press.

Sen, Amartya, 1985, *Commodities and Capabilities*. Amsterdam. North-Holland. Oxford University Press.

Sen, Amartya, 1984, *Resources, values and development*. Oxford. Basil Blackwell.

Sen, Amartya, 1999, *Development as Freedom*. Oxford. Oxford University Press.

Smael, M., y Alpert, E., 2009, *Making investments in poor farmers pay: A review of evidence and sample of options for marginal areas*. Washington. Oxfam América.

Stouffer S.A.; Suchman, E.A.; Devinney, L.C.; Star, S.A.; y Williams, R.M., 1949, *The American soldier: Adjustment during army life 1*. New Jersey. Princeton University Press. Princeton NJ.

Streeten, Paul; Javed, Burki; Mahbub ul Haq; Hicks, Norman y Stewart, Frances, 1981, *First things first: meeting basic human needs in developing countries*. New York and Oxford. Oxford University Press.

Tezanos, Jose Felix, 1999, *Tendencias en desigualdad y exclusión social*. Tercer foro sobre tendencias sociales. Madrid. Sistema.

Thaler, Richard, 1988, "Anomalies: The Winner's Curse", en *Journal of Economic Perspectives*, 2(1): 191-202. DOI: 10.1257/jep.2.1.191.

Thomas, Willian y Znaniecki, Florian, 1918, *El campesino polaco en Europa y en América*. Boston. Bagder.

Townsend, Peter, 1979, *Poverty in the United Kingdom*. Reino Unido. Prenguin, Harmondsworth.

UNESCO, 1960, *Convención relativa a la Lucha contra las Discriminaciones en la Esfera de la Enseñanza de 1960*. Recuperado de http://www.unesco.org/fileadmin/MULTIMEDIA/HQ/ED/GMR/pdf/gmr2010/gmr2010-ch3-es.pdf

Wiggins, David, 2002, *Needs, Values, Truth. Essays in the Philosophy of Value*. Oxford, Reino Unido. Clarendon Press.

Yitzhaki, Shlomo, 1982, "Relative deprivation and economic welfare", *European Economic Review* 17, 99-113.

Yitzhaki, Shlomo, 1979, "Relative deprivation and the Gini coefficient", en *Quarterly Journal of Economics* 93, 321-324. Cambridge.

Curricular information of the author

Doctora en Economía Aplicada. Coordinadora del Centro de Investigaciones Económicas y catedrática de economía en Universidad de Las Américas (UDLA) en Quito, Ecuador. Consultora para organismos nacionales e internacionales en Latinoamérica, África y Asia.
ORCIDID: https://orcid.org/0000-0003-3509-6316
Dirección electrónica: olartesusana@hotmail.com

Article received on 15 april 2016 and accepted on 4 april 2018.