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### **Sustainable tourism: basic income for poor communities**

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### **Abstract**

When examining the proposal of an unconditional basic income (UBI) - a cash grant universally distributed to individual members of a political community irrespective of conditions – a question arises whether it is as attractive for poor communities as it may be for rich ones. Poor communities are poor in resources and this should block UBI proposals. However, literature and practices on sustainable tourism suggest that this may not be so, i.e., neither wealth is an amount of fixed and well defined values nor is its production doomed to be organized through socially exclusive processes. In this paper, we explore the potential for collaboration between the two fields, of sustainable tourism and basic income, and identify the challenges ahead.

**JEL code:** I38

**Key words:** basic income; sustainable tourism; development; redistribution.

## Introduction<sup>1</sup>

A question that naturally comes to mind when examining the proposal of an unconditional basic income (UBI) - a cash grant universally distributed to individual members of a political community irrespective of conditions -- is whether it is as attractive for poor communities as it may be for richer ones. To begin with, poor communities are poor in resources and this should pose a limit to UBI proposals which might block imagination and discourage the basic-incomer. However, literature on sustainable tourism and related policy experiments, especially in less developed countries, suggest that this may not be so, i.e., neither wealth appears as an amount of fixed and well defined values nor is its production doomed to be organized through socially exclusive processes. An unexpected collaboration then emerges: sustainable tourism's body of knowledge and practices may assist basic-incomers to find out more contexts of application of the policy while basic income literature and proposals may help to sort out fair compensation issues in sustainable tourism experiences. The potential cooperation between the two fields also raises questions related to development and redistribution which though not at the core of the basic-income mainline research program should be seriously addressed by its proponents.

So the paper starts out situating basic income in the context of development and redistribution issues, in Section 1. Section 2 addresses the general question of tourism as a valuable asset, while section 3 explores the issue of why touristic resources can be considered common property and how basic income might come in to generate a notion of fair compensation for the economic use of communities' resources. Section 4 introduces two models of tourism exploitation and presents a couple of cases of touristic sustainable development. Section 5 concludes with a brief assessment of likely benefits of the cooperation between sustainable tourism and basic income.

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<sup>1</sup> This paper has been prepared for the 12th BIEN (Basic Income Earth Network) Congress, University College, Dublin, Ireland, June 2008.

## 1. Basic income, development and redistribution

Basic income is a quite popular public policy, even when it does not carry its own name.

In fact, nowadays, myriad forms of “social wage” do exist, ranging from traditional income and social services provided by consolidated welfare states in developed countries, to ‘new age’ redistribution policies tailored to compensate for market reforms in less developed countries. The increasing importance of this source of families’ income testify to the decreasing capacity of markets, let alone traditional family strategies, to respond to the well-being needs of people over their entire lifetime.

Under the guise of welfare state and social protection policies, basic income seems more palatable than when it is framed as a universal and unconditional policy, though. Often the objection comes from partisans of two different fields: development and redistribution.

For the developmentalist, basic income is considered to be feasible only when development has already reached a certain mark and is in any case considered detrimental for countries that are still struggling to develop, in that its opportunity costs are sizable: why not invest instead in infrastructure and job creation (demand-side developmentalists) or public education (supply-side developmentalists), investments whose multiplying effects would be considerably greater? For the redistributivist, a universal and unconditional basic income would mean a poor choice; a much more efficient inequality-reducing policy would have the income redistributed to the poor only. Thus, the redistributivist supports targeted and conditional policies when it comes to income, however in favour of universal provision of social services he might also be.

The focus of both objections is on basic income as a source of *income* (and fulfilment of needs), which it *only incidentally* is: provision of jobs/skills would do better according to developmentalists; targeting the poor would do better according to redistributivists. However, basic income is primarily based on *rights* over commons (Van Parijs 1995), not needs; thus, it is only secondarily that a needs perspective should be added.

The focus on rights over commons, instead of fulfillment of needs, has two implications. At the level of redistribution, it implies that those who currently own and use common property should pay a rental for everybody else for its use, corresponding to their share in the commons. The second implication is that this redistribution - from those who benefit from the control of common assets to those who are deprived of such control - is not driven by the purpose of eliminating poverty or “levelling the playing field”. It is not, *prima facie*, a question of poor and rich, but of membership in a political community which confers rights over the community’s common riches.

As we engage in the exercise of extending rights over common riches to the citizenry, however, secondary considerations are expected to jump into the policy design process.

These considerations reflect the fact that policy makers should take note of the likely practical consequences of policies. Incidentally, this is the sort of mix of positive and normative arguments that is often neglected, i.e., that factual statements about the world may affect our normative judgments in that they awaken concerns that were not taken into account when abstract ideals were articulated in an idealized setting (Kerstenetzky 2002; 2006). It seems that we are better prepared to accept that our normative ideas prompt us to look for and understand the way the world works in some particular area, than we are to recognize the equally important impact of factual truths about the world in the shaping of our normative ideals.

The consequences that we are interested in anticipating when considering a BI policy are the problems that worry both the developmentalist and the redistributivist, problems that are especially compelling in the context of less developed countries. That is, we are concerned with development and distributive consequences.

How to pursue a policy like basic income for all in a way that is also helpful to development or to the reduction of poverty and inequality?

To cope with the new problems, we could then consider desirable that the state provides a basic income for all its citizens and yet charges some citizens more than others, on the basis of their contingent affluence, in order to finance social services and the provision of basic income itself, as the redistributivist would like it – thus, considering that redistribution is the net balance of benefits provided *and* taxes paid. Or, alternatively, taking the perspective of the developmentalist, we could use the taxes

collected partially to provide the BI, partially to fund the provision of jobs, either directly (public jobs) or indirectly (public investment in infrastructure or education, generating demand or else externalities for the private sector that would then create the jobs).

So, in principle, and taking into consideration a whole lot of concerns – with rights, inequality/redistribution and poverty/development – there is no incompatibility between the basic-income proposal and developmentalist and redistributivist policies.

However, it remains trivially true that the *level* of development is important when it comes to define the *size* of the basic income. Richer communities could provide a more significant basic income than poor communities might do. So the question arises whether the BI policy is relevant or even feasible in poor communities. The other natural question is, considering that these communities are far behind in terms of economic development, whether a BI policy would be *detrimental* to development itself.

Let us take up, briefly, the latter issue, on desirability, first.

Is basic income compatible with development? To the extent that BI gives access to markets of consumer goods for people who otherwise would not have it, BI is constitutive of development and, as a potential multiplier of income and jobs, also instrumental to development.

A recent assessment of the impact of the Bolsa Familia in poor regions in Brazil has shown that the grant has enabled poor people to buy more food supplies and other basic goods, and, in virtue of being a stable source of income, it has also enabled them to obtain credit to acquire undreamt of durable consumer goods such as refrigerators, and TV sets (IBGE 2008). Other documented effects of guaranteed income in poor regions are positive impacts on labor market participation (the money is important for people to look for and get to the jobs) and work motivation of grant recipients (the money has enabled people to look for more gratifying jobs). Of course, an undesirable feature of the program remains the fact that a large amount of poor people is still excluded from it, which may in part be attributed to the fact that the grant is targeted, not universal (usually, the poorest are the hardest to reach), and that it is a social program not a guaranteed right (its provision being budget-constrained, not guaranteed at the Constitutional level) (see Kerstenetzky 2008).

We may similarly be concerned with distribution. Is BI likely to sustain low levels of inequality? Through its impact on development and poverty, as discussed above, BI is at least pro-equality in the short run in that it increases the access of poor people to goods they otherwise would not have. However, as BI boosts economic activity, it is difficult to discern its overall distributive impact in the long run.

Concerning the issue of feasibility, our main argument in this paper is that even if a community is not particularly rich in terms of conventionally valuable assets, say, the array of existing and already exploited natural and social capitals, it may potentially have, and might accordingly exploit, riches that to a certain extent come into existence in virtue of a combination of market processes and accurately designed policies. We elaborate on this point below.

## **2. Tourism attractiveness as an asset**

A potential source of riches is tourism. To see why, it suffices to have in mind that the tourist is someone who moves about in order to have different experiences than the ones he routinely has. He wants to travel to different lands and “worlds” to break off with his routine which of course he is prepared to resume, when the time is over.

So, potentially any place might be a destination for the ideal tourist, because what he seems to be looking for is to be to some degree alien to himself for a while, away from the usual references, experimenting the freedom of the incognito. The varying extent to which the tourist really takes this plan seriously, and is able to make his initial wish come true, is immaterial to the point here. We are merely remarking that tourism creates important opportunities for otherwise “poor” places. For even these places are to some people “other”, unfamiliar, places where the experience of otherness can be lived.

Markets for tourism are filled with institutions (Kerstenetzky 2007). Not only in the trivial sense that these markets are permeated and regulated by non-market institutions but also, and more significantly, in the sense that, while dealing with an intangible and to a certain extent ineffable good, they need to ascertain the intrinsic “goodness” of the goods transacted. In the process both the supply of services and the preferences and wants of prospective consumers are institutionally refined and even shaped.

For example, an economically poor destination, away from the origin of the potential tourist, may have a rich history, unique cultural experiences and landscapes, desirable for contemplation or fruition -- all potential goods to be exploited to the benefit of the community and to the enjoyment of the tourist. But these goods have to “come to life” to be contemplated by potential buyers. Also, the potential buyers should be made aware that what they are wishing for, the object of their desire, is under the guise of these community-specific qualities.

This is a window of opportunity for the policy maker to intervene and help provide the conditions for this market to exist when it does not. Once the economic activity is in place, it creates the opportunity for funding a basic income policy. The legitimacy of taking rent away from the activity to distribute to the whole community is warranted by the fact that the historical, cultural and natural riches – which of course are converted into riches in the market sense of the word only when economically exploited – arguably constitute a property of the community (we argue in those lines below).

This would make the whole story, at least at an abstract level, were it not for development and distributive concerns<sup>2</sup>.

The inclusion of these concerns imposes on the policy a number of additional qualifications. The policy maker has to undertake at least two additional research lines. To begin with, she should have to check on the touristic activity to be sure that it is an unambiguous source of development promotion and inequality reduction. A common experience in stunningly beautiful places, located in poor countries and poor regions in middle-income countries, is the co-existence of luxurious resorts and fancy touristic facilities and services, and poverty and inequality among local people related to the touristic activities themselves.

Relatedly, it would also be relevant to check on whether the existing governance structure (markets and state) is the appropriate structure for the definition, implementation, and monitoring of development and redistribution standards: many of these touristic private investments are stimulated and even subsidized by governments on the pragmatic basis that they bring foreign currency and stimulate economic growth,

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<sup>2</sup> They apply also to situations of rich local communities, where tourism always tend to bring about a wealth distribution shift, see for instance the discussion of Tuscany (Italy) in Punzo (2004).



which are automatically equated with development promotion and poverty and inequality diminution.

So, the inclusion of a notion of sustainable development, socially and environmentally responsive, in association with the promotion of tourism as an instrument for the implementation of basic income, as well as the expansion of the governance structure so as to include “community”, seem in order. We now turn to these possibilities.

### **3. Tourism: common pool, property rights, fair compensation<sup>3</sup>**

If BI policy orientations are founded in rights over commons, rather than on needs, this cannot be truer in the case of tourism.

Tourism is always transformation for the onsite consumption of foreigners of unmovable local resources that were used, up to the opening to tourism, only by the communities. The range of such resources is large enough: from beaches and mountain sides, that become swimming and skiing places, to historic cities, to cultural entities encapsulated in lonesome villages. Even in the case of the most artificial of tourism offers - such instant resorts as they grow from one day to another in many less developed countries, increasingly and intentionally anonymous but for the climate and the public, or artificial attractions Disneyland type - still imply the use of territory, hence the diversion of its use from alternative, traditional uses.

There is nothing as intrinsically territorial as tourism: production and consumption take place and can only take place on the same place, *physically* even before than culturally or economically. And you cannot be a tourist but away from your home, in somebody else’s home. Finally, you can only be a tourist for some time, you cannot be one for your lifetime. Both place and time, both different from your everyday existence, are part of your temporary existence as a tourist.

In any case, you must not be in your typical everyday milieu. This brings in the notion that in producing so called tourist products, one is always bound to bundle up local resources that can only be conceptualized as common pools for the resident communities.

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<sup>3</sup> Themes discussed e.g. in Bimonte and Punzo (2006).

Accepting the key anthropological view that tourism is about the encounter of hosts and guests (more than about touring, as the name originally suggested and still reminds to mind, erroneously), we economists have to represent the activity of producing tourism as a conversion of such locally owned resources into flows of services for the tourist, in exchange for (monetary and/or non) benefices for the historical owners. The latter have a claim on the territory where they receive tourists as they tilled the land, cared for the ecological equilibrium, created the landscape, built churches and monuments, and created the local culture. Such territory/general container is in other words, the mirror reflection of the local community's historic presence and activity, its development decisions, its historic accidents and even tragedies. Like modern Siena. It is the result of the industriosity of the Sienese and their jealousy to preserve their cultural identity, but also of the black plague that killed half of its population in 1348, blocked the construction of its cathedral planned to be the grandest in Europe, and initialised that industrial decline of the city that preserved it as the gem we know now. A similar history can be recounted of many places that are touristic attractions, often on top of the heads of those who created them. It can be told of the isolated or even lost communities we are going to talk about in a minute.

It is because the tourist is a guest that in a sense we have to recognise a right to property of the resident, in comparison not in absolute (as many cultural sites are mankind' property, really). It is because of the encounter between an indigenous and an invading populations that we have to recognise the right of the former one to some benefices from the sharing of its own resources, the territory as a basic space, to begin with, if not for anything else.

Tourism implies sharing resource services, preserving resource capacity to issue those services that they were molded to produce in the century, and finally about fair compensation for sharing. How do we define fairness in this context? Here come in the issues of the functioning of markets and institutions.

We have over the years, if not centuries, developed ways, ideologies, schemes and institutions to take care of fairness in compensating for private goods, mostly material goods. Tourism is about public goods, mostly if not totally public goods. The services the tourist uses, e.g. The night in the hotel, the meal at the restaurant, the horse she rides, are basically instruments as compared to the objective of her desires, which

drives her decisions to buy and to go here in preference to there: the experience of having been there, having done this or that but there, not elsewhere.

A fair compensation scheme is complicated also because in a sense it has to be fair in conditions very similar to those of a natural monopoly: Venice or Rio de Janeiro, or Amazonas, or ... are always unique, and in principle they should command a price reflecting this position, and the revenue should accrue to the owners of the resource. The Sienese, the Venetian, the Cariocas: How? Who of all of them?

This un-clear state in the definition of the distribution of the benefits from local resources is so chronic that no property right argument can really deal with it<sup>4</sup>. It descends from the fact that collective (but only of the residents) property rights have to be recognised the moment there is an invader, the tourist, and one sees the opposition between the interests of two culturally distinct populations. They are not necessarily recognised before, if they are (with the enclosures, for example) this came about for different reasons and had distinct consequences that we know of. For this reason, it is a peculiar situation; in fact, it represents the challenge of tourism. It calls for “superior intervention” or for a different approach, BI being a candidate to be one of them.

#### **4. Tourism in Less-developed countries: two models of supply organization<sup>5</sup>**

Here come in the themes of tourism development, its sustainability and its alternative ways. Certain stylised facts can be sketched out thus, to help (they apply particularly to less developed countries<sup>6</sup>):

- i) Rapid concentration of tourism production in a few industrial-type of enterprises;
- ii) Relocation of major production activities, especially of the more traditional type, in low-cost less developed countries;
- iii) Support of less developed countries governments, at various levels, for massive FDIs from the handful of those major firms;

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<sup>4</sup> Some consequences of this view as to tourism development planning are worked out in a specific case in the case study reported in Punzo (2007b).

<sup>5</sup> See Punzo (2006).

<sup>6</sup> These countries are being the target of massive tourism developments in recent years, as a result of a variety of factors, some cultural, some purely economic like the saturation of certain first world destinations for traditional tourism and the increasing costs of producing it.

iv) Creation of local developments that have a fast growth history (they are called instant resorts), have low or lowest impact on the local community economies, finally being linked to low investment cost (often artificially low for partially borne out by local governments), have short term profitability horizon.

In synthesis, for the purposes of our argument here, the most frequent approach to cash the economic value of the opportunities of local resources, is expropriate the local communities and entrust a fast development plan in the hands of some distant, and basically non territorially based, firm.

However, producing for tourism is such an activity that tends to escape from the logic of industrial production, notwithstanding the fact that a majority of big operators in the tourism sphere still adheres to such a philosophy. (At times, one has the feeling that they are trying to promote an industrial dream constructed on production models that are often felt to be obsolete even where they were born). So, we can describe two models of production arrangements, and what is interesting is that they seem to be able to coexist, often side by side, so that economically they must be doing just as well, though we do not know how exactly to measure such relative performance.<sup>7</sup> One such model is the *vertically integrated (VI) firm*, its extreme alternative is the *territorially diffused supply structure* (often, improperly referred to, as local tourist systems or districts<sup>8</sup>).

As said, the former one is the one that seems to prevail in the less developed countries: its advantages are:

- i) Rapid realization;
- ii) Short term high profitability, which makes them attractive for foreign investors;
- iii) Self-containedness, which makes them efficient, disposing automatically of various local bottle necks in factor and intermediate good supplies;
- iv) Control of the whole pipeline of the tourist production, which permits internalizing the communication/marketing stage as part of the production scheme.

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<sup>7</sup> As it involves measuring society wide effects that are difficult to monetize, for example.

<sup>8</sup> Punzo (2004).

On the other hand, there are costs, often hardly accounted for, and generally not borne by the firms themselves, but instead by local communities:

1. Expropriation of public places and/or productive or leisure local resources;
2. Pressure on allocation of local productive resources, which leads to short term investment plans, from space to human capital;
3. Little or nil impact upon the local production structure, the consequence being that development within tourism goes along with underdevelopment, lagging behind or even negative development of other productive activities;
4. The homogenization of the tourist product, which produces tourists who are indifferent to the place they visit, hence generating a lower rent extraction, hence profitability.

This last effect implies a cost borne by the local community which is in fact unable to or prevented from cashing the benefits virtually flowing from the resources it is making available to the tourists. It is the local community that loses a potential source of income that could be distributed according to principles of fairness and equity to the legitimate stakeholders. In other words, the relative lower costs of vacations to a visitor in a less developed country resort is often, if not always, the result of not compensating legitimate stakeholders for resources' services they have a claim to.

On the other hand, typically, the VI production has further un-accounted for consequences, with related costs, in terms of lower capital accumulation (in terms of private but also infra-structural capital which if at all is accumulated functionally and locally around the tourism facility and does not benefit others), distortions induced in the local production specializations, abandonment of traditional activities that can have a longer term intrinsic and/or option value.

To illustrate the relatively superior merit of a local development model (adhering to the entitlement view of BI), constructed upon diffused production, valorisation of local resources (including human capital in its variety of forms), and a scheme of

returns distribution to the *natural* stakeholders from tourism relevant resources (the *tourism attractions*) – we present hereafter a project to be realized in Piauí, Brazil.<sup>9</sup>

### 5. The economic value of local assets : *National Parks may become engines of social development*

This case<sup>10</sup> focuses on putting forward some guidelines and economic arguments supporting an approach to planning and development of a certain type tourism, referred to as heritage or cultural heritage tourism<sup>11</sup>. As we have seen, the VI approach focuses on point-wise, intensive development projects, with very limited fall-out of benefits for the surrounding and nearby communities. It can be seen to prevail in many LDCs and in Brazil, where it goes together with the increasingly intensive, continuing exploitation of coastal resources and the promotion of traditional types of tourism, thus perpetrating the history-long dualistic un-balance of territorial development of that country. It is now perceived to be the time to look for alternatives that try and hit a manifold objective: spreading geographically development towards the interior of the country, spread its benefits across the population, realizing a superior equilibrium in terms of distribution of income and wealth so as to generate the social conditions for long term, sustainable development. This alternative approach whose guidelines we are going to exemplify with a project in Brazil, is in principle applicable also elsewhere, and therefore such guidelines have to be taken as a tentative model.<sup>12</sup>

We are in presence of two distinct situations – two sister areas around two national parks at the south of the state of Piauí -- whereby for the one of the parks, Serra

<sup>9</sup> The project involves the Osservatorio per il Turismo Sostenibile at the University of Siena, [www.econ-pol.unisi.it/opts](http://www.econ-pol.unisi.it/opts). Of course, this is not the only illustration: other two come to our minds, one of the *encampement rurales* in Guichinchor (Senegal) and another in Jordania, but by now there are plenty of good practices of this kind.

<sup>10</sup> From Guidelines and Report after the visit to Brasilia and to Serra da Capivara and Serra das Confusões , October 3<sup>rd</sup> to 11th, 2005. Preliminary draft. 28 October, 2005

<sup>11</sup> Here, by cultural heritage we mean the whole set of material and immaterial resources (part natural, part man-made or -cultivated) that form the stock of wealth of a community, where often material goods are instruments to immaterial services and they are valued for this relationship. Therefore, the adjective cultural has to be taken in its broadest sense, including next to artefacts and the like, also culture and landscape; while heritage is to be understood as a living stock of knowledge and active capacity of producing material goods and useful services for the current and future generations. Cultural heritage economics and tourism are meant to offer technical values to mobilise such resources for sustainable development.

<sup>12</sup> Such approach makes the most of the point of view embedded into the Joint Initiative of the Regional Governments of Centre Italy and the Federal Government of Brazil (henceforth, the Initiative for short) , where promotion of economic development is conjugated with deep concern for social measures aimed at general welfare, and the two are to be the result of a vastly decentralised decision making process.

da Capivara Park, there is a wealth of touristic and related initiatives, both ongoing and planned, and a declared interest and support on the side of the various Federal and State Ministries, to invest and develop the area. This reflects the fact that, due to the historic presence of international initiatives, it is easier and it represents a surer or less risky investment in the short and medium run, to concentrate available resources into a single pole.

At the other extreme, the area embedding the Park of Serra das Confusões has no development to talk of. Even the park can be said to have been created only by law but not implemented. Similar observations can be made about the territory and its general and tourist-specific service industry and production social structures. Thus, it is riskier, more difficult, demanding a greater cooperation of various bodies both at the governmental as well as international levels, to undertake action in this area. Of course, resource needs for investment will be proportionately far greater. Finally, returns will take a much longer period to accrue. This largely explains the resistance one perceives from the part of the Federal Ministry (and perhaps even State Secretary) of Tourism in undertaking even mere discussions of the possibilities of Serra das Confusões' development.

It seems clear that in the latter we are still far from being ready to launch tourism development on the scale one can promote in the nearby sister area. On the other hand, it also seems clear that concentrating resources upon Serra da Capivara alone, as seems to be the governmental view at the moment, will

i) if successful, generate a concentration of tourism flows upon a relatively small area, raising therefore concerns about the environmental and cultural impact upon an already fragile natural and poverty-stricken cultural situation;

ii) easily run the risk of degenerating tourism development into the resort-model of punctual, mono-cultural economy, in the middle of a desert, part original, part product of that development itself;

iii) bring about an aggravation (in terms of all economic indicators of employment and income, for example) of the unbalanced economic development that already can be perceived to be on the way, between two contiguous areas, with consequences that can be easily foreseen;

iv) fail to rip the fuller benefits of setting up and pursuing a two-stage model of economic and social development that, using tourism as a sort of ignitor and fly-wheel, will make the best of a strong governance coordination between the two areas, assigning to the now more advanced one the role of pull factor until the less developed will be able to catch up.

In such two-stage model, the Serra da Capivara area would set the path and be the experimental laboratory for various social and economic initiatives (promotion of SMEs, microcredit, creation of forums of stakeholders, high level training in tourism related education, setting up of producers' networks, establishing standards and trademarks, etc.), while in Serra das Confusões various pre-tourism development activities would be taking place. A transfer of resources (of a variety of types) from one to the other area will ensure to bridge the deficit gap of the lesser developed one.

Sheer economic reasons, before marketing considerations, suggest that tourism planning has to be coordinated and both horizontally (geographically) and vertically (production structure) integrated to attain the full, long run benefits of sustainability in development.

Given the general basic conditions of the territory (taken to comprise both Serra das Confusões and Serra da Capivara), it is clear that whatever we will try and can do within the Initiative, will have to integrate tourism onto a hard bed of improved social policies, as to health and hygienic conditions, garbage collection, water and electricity steady supply, of course family conditions, and in all the improvement in the provision of basic services which, meant for the population, will benefit also the tourist. And, vice-versa, of course.

Actually, as in many other similar situations of the LD Countries, seizing the opportunity of a tourist led development can generate side benefits for the general quality of the resident communities' lives if such development is carefully planned with this as its real medium-long term objective. Mobilizing resources over which the local communities have a claim, generates flows of real incomes that are the actual benefits of tourism.



### The project<sup>13</sup>

The project sites are the environments of two national parks, located at the border between the States of Piauí and Bahia, some 700 kms South East of the state capital of Piauí, Teresina, where an international airport is situated. The two parks are geographically close to each other, an ecological corridor being created to connect them. A new connecting road is under construction, at the moment it is a dirt road requiring some 2 hours of travel to go from the capital of the Capivara's area, São Raimundo Nonato, to the next city gravitating towards Serra das Confusões, Anísio Abreu.

An international airport is planned to be constructed at São Raimundo Nonato, the money is said to be already available, though construction has come to a halt, apparently due to arguments between the construction company and the government. The airport is meant to serve the parks, and in particular the Capivara, but also the whole area: i.e. the southern part of the state of Piauí, where no other proper airport is available, the south-western part of the state of Bahia (the nearest airport being Petrolina, estimated time to get there between three and seven hours), and some of the state of Tocantins.

Sizes of the two parks are quite different: Capivara being one fifth of the Serra das Confusões, which is some 500,000 hectares. At the moment, only the Capivara is equipped as a park, at international standards (it was created in 1978), while Serra das Confusões, is a general management plan which is waiting to be implemented, two access points having being created, one Ibama site in the nearest city Caracol, some three to four guides, but the park is still officially closed and only illegally used by nearby residents. The access road we have seen (with special car) is in very bad conditions.

Resources of the territory:

Serra da Capivara:

i) Archaeological sites are fully equipped, excavation going on with both Brazilian and foreign professional teams. Various universities are involved in the excavations;

ii) The park is being (well) managed jointly by Ibama and the Fundação do Homen Americano, FUNDHAM;

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<sup>13</sup> It was part of the INTAP initiative presented e.g. in Punzo (2006).

- iii) Natural sites are in good order, and themselves a tourist attractor;
- iv) In the park once a year there is a music festival.

Serra das Confusões:

Differently from Capivara's (that was created to preserve archaeological sites of worldwide importance), the motivation for creating the Serra das Confusões is preservation of a large section of indigenous forest and landscape, called *caatinga*. (The size of the park shows it.) Virtually no community lives inside the park, 98% of the owners having being already expropriated, the nearest settlements being in a corner of the park territory. As for resources,

- i) landscape and vegetation that are amenable to various uses, from contemplation to scientific research (the *caatinga* is a quite special type of vegetation) and ecological education;

- ii) some 40 archaeological sites have been already discovered, though only less than twenty registered by IPHAN. This shows that obviously early human presence was not limited to the Capivara site, and in fact we are told that the whole area, including outside the park(s) is literally populated by graphites.

- iii) There is an important animal attraction, with birds and mammals of various sizes.

Thus, Serra das Confusões can be characterised as a unique combination of a natural park with archaeological sites, while the Serra da Capivara is an archaeological site in a similarly splendid natural landscape. This does not imply that the Serra das Confusões has no archaeological interest, on the contrary: this latter is however inserted in a much more varied portfolio of reasons of attraction.

Therefore, as the two parks complement each other, for this and related reasons it seems correct to treat them jointly in the light of local economic development.

The pressure of local *traditional* uses for and in the two parks comes basically from their *surrounding settled environment*, and it materializes in hunting, deforestation to bee breeding. Hunting together with the practice of clearing by fire are the two endemic plagues, threatening the park. The situation is rather worse in Serra das

Confusões due to the absence of any efficacious control by an insufficient number of guides and due to the size of the territory. In both cases, local communities resent the expropriation related with the creation of the parks, and puts in place various resistance actions.

The mere existence of the parks is therefore in serious jeopardy for lack of social sustainability. The only way to solve this problem is through political, social and economic involvement, (re)distribution of benefits and general education, e.g.,

- i) education of the public (in particular at scholar level);
- ii) a local communication campaign with the general public, already demanding information, and possibly with the establishment of permanent local info points;
- iii) a campaign and measures ensuring the active involvement of the nearby communities in both the establishment and subsequent management of the park itself.

In particular as for iii) it is advisable to convert illegal users of the park into collaborators, e.g. hunters into part time touristic guides and in creators of paths into the caatinga. Income from guiding and similar activities has to replace real income from hunting.

The message to the communities has to go beyond the mere prohibition of certain activities, showing how to convert animals, forest etc., from exhaustible to renewable resources. The park gives them this chance. In fact, from the point of view of traditional stakeholders, parks have to be conceived also as economic enterprises. Their return or profitability in a strict sense may be small if calculated in the conventional management sense, so that we should think of them as worth less for their function of preservation (which is instead a constraint) than for the role of promoting economic development they can perform. We have to make the most of the latter, to socially and economically justify the sacrifices involved in their establishment. Economic valorisation of activities and products of the parks, because they are realized or originated in them, is to be viewed as the compensation for those activities and/or goods that we have to refrain to undertake in setting up a park. This valorisation redresses the economic balance between costs and benefits. This can be done in a variety of ways, but basically there are two guidelines:

i) think of a park, with nearby areas, as a whole productive structure, with its variety, delivering goods (fundamentally agro-food products, from food properly to medical plants and herbs) and preserving time honoured abilities, say in handicrafts. A park is created where either or both of them have managed to survive economic development.

ii) They are therefore part of the *cultural* (as complementary to the *naturalistic*) existence of the park. Therefore, we have to put in place a number of activities to cultivate those special natural and man-made goods, and to communicate the value added that lies in their being associated with the existence and preservation of the park.

More specifically in the areas of the Serras, there are some unique-quality agricultural products (honey and cashew) and special handicrafts that need to have specific actions directed to them, in order to ensure quality standards and improvement (education, producers' assistance, marketing techniques) as well as communication devices (say a park brand name and similar, as they have been experimented with successfully in the Italian parks).

- Resources outside the park(s):

The parks being regions where human presence has to be controlled, for purposes of planning economic activities, it is the territory containing them that has to be considered. This territory is the basin of both of them, containing some 9 municipalities plus a number of settlements, with a very difficult geographic hence communication structure, and virtually no paved road. Hence,

i) Important paved roads pass by and in fact delimit the borders of the relevant territory.

ii) There is a limited number of hotels, pousadas, and other forms of hospitality. Quality seems very poor in general, except for three cases we have observed, still the star system of classification is absent this showing that none qualifies.

iii) There is a limited number of restaurants and eating places, obs about quality are the same.

iv) There is an important culinary tradition, based on local unique ingredients.

v) There is some *artesanato*, lace work (which however has moved to the Delta), ceramics (valorised in São Raimundo Nonato with the production of small items in the colours of the archaeological sites), and other forms of using *caatinga* materials (seeds, timber) for semi-artistic uses.

vi) The general infrastructure is however poor, from roads to transport, to telephone services, both fixed and cellular, to shops etc.; this reflects the general state of poverty of the territory.

vii) Schools are unevenly distributed but they seem to exist, catering for a reasonable number of youths. Their quality levels are unknown, we know of the small or nil number of computers, very rare access to internet, which is however being promised through a satellite access (a project is being considered).

viii) There is a limited presence of a Federal University.

On the whole, the territory has potentialities for developing tourist attractions, but these potentialities can be unleashed only if and in parallel with its general social development. One can characterise the situation as *a pre-touristic phase*, demanding a variety of measures to be put in place. Of the two, of course, the piece of territory gravitating around Capivara seems to be in a way further developed, due essentially to the better resources *within* the park.

There are *two scenarios for tourist development* at the moment:

i) tourism is concentrated where it is, in the São Raimundo Nonato area (next to the Serra da Capivara). This flow will arrive at the airport and spend about one to two days in the park, being hosted in large size resort type of hotels. This is the easier scenario to implement and it is being considered by international investors. This is an extension of the existent flow. The tourist is motivated by interest in archaeology and history, she is an educated person ready to undertake a long journey for such interests. She has on the other hand little or no interest for the territory surrounding the park, and therefore will have very little impact on it, even economically.

As the income multiplier effect onto the local economy will be very small, the only way to produce sufficient income to motivate the large investment needed to develop the site touristically, is by generating large flows of short stay tourists. While the economic impact will be small or nil, the environmental impact will be large, also converting a sophisticated touristic attraction into a baracoon-like site.

ii) the alternative scenario develops the two parks together, exploiting the above complementary characterisation, and focuses upon the various resources of the large territory embedding them. This scenario uses the foreseen airport as the gate to the territory, develops a circuit through the 9 municipalities, which is motivated by the presence of the two parks and the ecological territory but results into the acquaintance with its culture and traditions, with the people living there and their communities.

This scenario has a high multiplier effect upon the local economy, and therefore comparatively needs a smaller number of tourists to generate adequate income, which moreover will be spread around the territories and among economic activities, from hostelling to eating places to producers of local typical product and *artesanato*. The *bonus* from this sort of development is the enhancement of the general quality of services and products, thus also benefiting the local communities.

While scenario one demands a large private investor, and materialises in a single or few large self contained resorts, scenario two needs a number of local hostels and eating places, able to coordinate with each other, and various outlets for local produce. Its impact upon employment will comparatively be greater, too.

It is difficult to assess the financial viability of a project to develop the Serra das Confusões park as a tourist attractor; one may also wonder if it is good to do so. To find motivation sufficient to undertake to do something, one has to look for profitability elsewhere, in a *broader accounting sheet*, rather than in the accounts of the tourist operation alone. In other words, we may find that the worth in development of the area is more in economic and social side-effects indicated above. Adopting this wider perspective is precondition to considering the feasibility and the interest of the whole operation, and it has to have us plan and implement a number of actions. It points in particular to the fact that institutions in the broad sense, including not only political bodies but also citizens' associations, forums of various stakeholders and communities,

etc, will have to be empowered as the recognition to their right of disposing of the resources they have a claim on.

It is however *also* as a way of minimising the risk of failure associated with the development project at the same time as representing a mechanism for risk sharing via an embedded system of incentives towards efficiency.

Only such middle institutions have to support any intervention, and all other means we can envisage are only supplementary risk reducing measures. Some ideas as to what sort of tourism types to target:

- i) We need not target one single type of tourism, but we can make of cultural variety of territorial attractions, a principal instrument of tourism sustainability, spreading across activities and seasons a comparatively greater number of tourists;
- ii) On the other hand, segmenting and differentiating tourism offer will allow for relatively lower capital intensive operations, hence giving a key role to locally born micro and small firms, and therefore it will permit a comparatively broader project within a tightly binding resource constraint. On the other hand, this operation will set in motion great human and immaterial capitals, thus tilting the balance of the tourist offer towards the valorisation of resources with long run positive effects on the communities of residents.
- iii) All this would result, on one hand, in positive externalities among different types of tourism services (example: accommodation, guiding, capability creation), the possibility of relevant cost savings through the mobilisation of existing expertises and other types of resources (once again, homes transformed into B&B at a market marginal cost much smaller than that of additional hotel rooms; refurbished village pousadas); finally, the implicit selection of tourists with tastes and interests compatible with the existing supply. The list of tourism niches, integrating the obvious archeologically interested ones, includes: special interest tourists, adventure tourism, cultural exchange programmes, in particular involving youths, farm and village tourism, which are all based upon the idea of offering the visitor a value-based experience, and gather for visitors relatively less demanding in terms

of comfort and other features of internationally owned operations, provided basic requirement be met as hygiene and sanitation, and this be compensated by the exceptionality of the experience.

- iv) the development of such niches will have to be supported by equally inventive additions to the local landscapes, from museums diffused across communities, to village centres for crafts and performing arts, and culinary schools, to courses and practice in botanical expertises and alternative indigenous medicine, etc.
- v) all this on its side demands a great human and social investment in capacity building in a socially diffused form, where new capacities are being formed from the time old ones.

## **6. Concluding remarks: sustainable tourism and basic income**

Clearly the research and policy agendas of sustainable tourism and basic income do not perfectly overlap. Sustainable tourism is about sustainable *development* - in the economic, social, cultural and environmental senses of it - whereas basic income is primarily about *rights*. However the two agendas may be congruent and complement each other in interesting ways. While basic income, as a entitlement view of compensation for the exclusive use of common resources, provides one solution to the hard problem of how to define fair compensation in the context of sustainable tourism, sustainable tourism in turn provides basic income agenda with a possible solution to the hard problem of how to have a basis for entitlement in the first place when it comes to really poor communities. So the prospects for more dialogue seem promising.

The contact with problems pertaining to sustainable tourism in our search for sources of riches to fund an unconditional basic income in poor communities has also disclosed other connections, which we have initially tried to work out as an intersection between a rights, a development and a redistributive views. While we already anticipated that development and redistributive concerns were not necessarily neglected by a UBI policy, the expectation that even underdeveloped communities were able to generate funds for the implementation of the UBI drawing on tourism had to be



importantly qualified by the documented fact that sustainable tourism itself needs a previous level of development without which it either fails as a sustainable experience (and ends up by depleting the resources the services of which it exploits) or shall never come to life.

So, the sustainable tourism experiences/project reported here patently show that without an array of public policies – ranging from social services provision and income transfer to poor families, to provision of basic services and urban infrastructure, to activating policies (training, assistance), and much market making (coordination design of various kinds, proactive preference formation), and design and implementation of coordinating forums involving the whole array of stakeholders – no such experiences will ever rip the fruits promised by their local resources.

(To illustrate, let us just pick up three of the many needed policies, not yet mentioned. On the basis of recent research showing that extreme poverty and inequality in Brazil have not shrunk as a result of an increase in either domestic or international demand for touristic services in the country (Tagasako and Mollo, 2008; Blake et al. 2008), cash transfers to the poor are being advocated not only as a poverty relief policy but also as an “activation” tourism policy, i.e., as a sine qua non for the very poor to acquire the minimum requisites to get to engage in touristic production (Tagasako and Mollo 2008).<sup>14</sup> Another public policy, related to market making, is public involvement in proactive preference formation, whereby with community participation and under public coordination an effort may be made to retrieve the community’s traditions, to enrich the cultural pool that may match the desire for otherness of the tourist. A third kind of policy that we may mention, one which seems crucial to internalizing the benefits of tourism, is the meta-policy of designing a governance structure that includes the active participation in the planning, implementation and monitoring of tourism initiatives, of all of the stakeholders, notably the usually absent community residents.)

The sustainable tourism experiences/projects have also shown that tourism opportunities can be and have been exploited quite often in a vertical-industrial scale, especially in less developed countries and with the active support of their governments,

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<sup>14</sup> In fact, Blake and co-authors conclude from their simulations that: “The lowest-income households are not... the main beneficiaries [of the increase in international demand for tourism], as households with low (but not the lowest) income benefit more from the earnings and price channel effects of tourism expansion. High- and medium-income households, followed by the low-income group, benefit most from the government channel effects, with the exception of the case when government directs the revenue from tourism expansion specifically towards the lowest income group”(124).

to the detriment of socially and environmentally sustainable development, and also to the detriment of sheer (long term) economic development, as the logic has been to seize the short term returns via intensive exploitation of local resources with scarcely any positive fallout. Typically the latter, more abundant experiences have been de-capacitating and de-empowering of the local communities, while very likely generating less wealth than would otherwise be generated were the capabilities of the local communities to be activated and enriched. So, in the context of a tourism-funded basic income in poor communities, *previous development initiatives* are important to make tourism possible, but also the *style of development* matters to render what in principle might look like a bunch of exhaustible resources into really renewable ones, *thus preserving the basic income pool on a long term basis*. This question seems relevant as even an (extremist) exclusive concern with the feasibility of the basic income would thus recommend a concern with sustainability – in the context of tourism, we hope to have shown that our view of what the resources are is not naturalistic, as it includes natural resources as they have been culturally incorporated, and other cultural traditions.

Thus, development is important in order to create the riches where barely any exists, and public policies, as they tilt the balance from predatory to sustainable ways of exploiting the common pool, are then also central.

Basic income, in turn, may contribute to the reflection on tourism policies with its entitlement view of compensation, which may not be irrelevant when expropriation processes involving poor families occur, as seems to be the case of the construction of the national parks in Piau . Expropriation may be quite a touchy subject in areas where families have had lifelong experiences of land deprivation. The ways out, considered in the project of the Serras in Piau , to conflicts with communities previously established in the area of the parks are basically of the ‘involvement and activating’ type but perhaps from a real freedom perspective these people should also be given the option out of the development project.

Actually, this is a distinctive trait of BI policies: they intend to maximize individual real freedom (for example, they offer an opportunity for people who are not willing to participate in the project, e.g. the option of using their entitlement rights in some other way non related to production). They also intend to maximize moral or cultural pluralism, in the sense that they allow for collective choices as odd as the one of living at the outskirts of a productivist society, as for example does the (extremely poor)

religious community of Rebelados in Cape Verde, which attracts the oblique nonetheless nostalgic eyes of passing byers, eventual tourists not allowed to get in.

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<b>TD 117</b>	Deflação, depressão e recuperação econômica: uma abordagem keynesiana. <i>João Sicsú &amp; Helder Ferreira de Mendonça</i>
<b>TD 118</b>	Possibilidades de análise da conjuntura mundial <i>Theotônio dos Santos</i>
<b>TD 119</b>	Globalização e mundialização do capital: o estágio atual do capitalismo contemporâneo nas visões de Chesnais e Minsky <i>Victor Hugo Klagsbrunn</i>
<b>TD 120</b>	O Mercado como Teoria da Sociedade: o radicalismo filosófico de Adam Smith <i>Angela Ganem</i>
<b>TD 121</b>	Hayek's Social Philosophy: the evolutionary versus the evolutionist <i>célia de Andrade Lessa Kertenetzky</i>
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<b>TD 123</b>	Déficit Fiscal no Brasil: uma análise do seu comportamento no período Pós-Real <i>Helder Ferreira de Mendonça</i>
<b>TD 124</b>	A Defesa do mercado no Brasil: o pensamento apologético de Roberto Campos <i>Angela Ganem</i>
<b>TD 125</b>	Eficiência, objetivo e coordenação da política macroeconômica no período 1974-79 <i>João Sicsú</i>
<b>TD 126</b>	A Utilização de mercados de licenças de emissão para o controle do efeito estufa e os custos de transação <i>Maria Bernadete Sarmiento Gutierrez &amp; Mário Jorge Cardoso de Mendonça</i>
<b>TD 127</b>	Reforma agrária e globalização da economia: o caso do Brasil <i>Carlos E. Guanzioli</i>
<b>TD 128</b>	Matemática e aplicações <i>Renata R.Del-Vecchio &amp; Rosa Maria Nader D. Rodrigues</i>
<b>TD 129</b>	O Conceito de normalidade econômica Marshalliano e o discricionarismo monetário de Keynes <i>João Sicsú</i>
<b>TD 130</b>	Qual o valor do Auto-Interesse? <i>Célia de Andrade Lessa Kertenetzky</i>
<b>TD 131</b>	A Teoria da Independência do Banco Central: uma interpretação crítica <i>Helder Ferreira de Mendonça</i>
<b>TD 132</b>	Dilema da Sociedade Salarial: realismo ou ceticismo instrumental <i>Mário Duayer</i>
<b>TD 133</b>	O Desemprego no Feminino <i>Hildete Pereira de Melo</i>
<b>TD 134</b>	A Teoria e o Método do Espelho da História <i>Angela Ganem</i>
<b>TD 135</b>	A Mensuração da Independência do Banco do Brasil <i>Helder Ferreira de Mendonça</i>
<b>TD 136</b>	Economia e Filosofia: tensão e solução na obra de Adam Smith <i>Angela Ganem</i>
<b>TD 137</b>	Inveja Iguatária <i>Célia de Andrade Lessa Kerstenetzky</i>
<b>TD 138</b>	Dedutivismo e "Teoria Econômica" <i>André Guimarães Augusto</i>

<b>TD 139</b>	A Economia Política da Privatização <i>Ruth Helena Dweck</i>
<b>TD 140</b>	O Trabalho Feminino no Mundo Rural <i>Hildete Pereira de Melo</i>
<b>TD 141</b>	Marx, Sraffa e a "Nova" Solução para o problema da Transformação <i>Marcelo José Braga Nonnenberg</i>
<b>TD 142</b>	Credible Monetary Policy: A Post Keynesian Approach <i>João Sicsú</i>
<b>TD 143</b>	Série de Pagamentos Lineares Convergentes: uma abordagem didática <i>Antônio da Costa Dantas Neto</i>
<b>TD 144</b>	Metas de Inflação: Uma análise preliminar para o caso brasileiro <i>Helder Ferreira de Mendonça</i>
<b>TD 145</b>	Teoria e Evidências do Regime de Metas Inflacionárias: Algumas observações críticas preliminares <i>João Sicsú</i>
<b>TD 146</b>	Regimes Monetários e a Busca da Estabilidade de Preços: O uso de metas para a taxa de câmbio, agrgados monetários e inflação <i>Helder Ferreira de Mendonça</i>
<b>TD 147</b>	As Atividades de P&D e o Sistema Financeiro: o papel de uma Agência Especial de Seguros de empréstimos no Brasil <i>João Sicsú &amp; Eduardo da Motta Albuquerque</i>
<b>TD 148</b>	Equilíbrio em Contratos Indexados: uma abordagem didática <i>Antônio da Costa Dantas Neto</i>
<b>TD 149</b>	Adam Smith e a Questão Distributiva: Uma breve resenha da literatura <i>Rodrigo Mendes Gandra</i>
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<b>TD 151</b>	Do Choque Heterodoxo à Moeda Indexada: concepções teóricas para se eliminar alta inflação crônica brasileira. <i>Rodrigo Mendes Gandra</i>
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<b>TD 154</b>	O Dinheiro e as Formas Monetárias <i>André Guimarães Augusto</i>
<b>TD 155</b>	A Teoria da credibilidade da política monetária: desdobramento do debate regras versus discricção <i>Helder Ferreira de Mendonça</i>
<b>TD 156</b>	Accumulation Regimes, Macroeconomic Structure and Capacity Utilization: a reconsideration of the relation between income distribution and economic growth in post keynesian models <i>José Luís Oreiro</i>
<b>TD 157</b>	O Seguro Desemprego é ainda uma Boa Idéia: o caso brasileiro <i>Hildete Pereira de Melo &amp; Lena Lavinas</i>
<b>TD 158</b>	A teoria do Capital Humano, as Teorias da Segmentação e a Literatura Institucionalista: proposições de políticas públicas e implicações sobre a distribuição de renda <i>Leonardo M. Muls</i>
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<b>TD 165</b>	Acumulação de Capital, Utilização da Capacidade Produtiva e Inflação: Uma análise a partir de um modelo pós-keynesiano não-linear <i>José Luís Oreiro &amp; Victor Leonardo de Araújo</i>
<b>TD 166</b>	Testing for Adverse Selection in the Brazilian Health Plan Market <i>Alexey T.S. Wanick &amp; Marcelo Resende</i>
<b>TD 167</b>	Teoria fiscal da determinação do nível de preços: uma resenha <i>Helder Ferreira de Mendonça</i>
<b>TD 168</b>	Faculdade da Economia da UFF – 60 anos de história <i>Hildete Pereira de Melo</i>
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<b>TD 173</b>	Metodologia para a recuperação do PIB trimestral utilizando modelos univariados e multivariados em espaço de estado com valores omissos, benchmarking, variáveis explicativas e heterocedasticidade <i>Luiz Fernando Cerqueira</i>
<b>TD 174</b>	Estoque e Produtividade de Capital Fixo - Brasil, 1940-2004 <i>Lucilene Morandi</i>
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<b>TD 176</b>	Intra-industry trade with emergent countries: What we can learn from Spanish data? <i>Juliette M. Baleix e Ana I. Moro-Egido</i>
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<b>TD 178</b>	Uma breve história da defesa da concorrência <i>Claudio Monteiro Considera</i>
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<b>TD 180</b>	Políticas Sociais: focalização ou universalização? <i>Celia Lessa Kerstenetzky</i>
<b>TD 181</b>	A Importância de Evidências Econômicas para a Investigação de Cartéis - A Experiência Brasileira <i>Claudio Monteiro Considera e Gustavo F. de Seixas Duarte</i>
<b>TD 182</b>	Federalismo Fiscal – Experiências Distintas: Estados Unidos e Brasil <i>Ruth Helena Dweck</i>
<b>TD 183</b>	Uma avaliação dos custos e benefícios da educação pré-escolar no Brasil <i>Ricardo Barros e Rosane Mendonça</i>

<b>TD 184</b>	Progresso e pobreza na Economia Política Clássica <i>Celia Lessa Kerstenetzky</i>
<b>TD 185</b>	Padrões de consumo, energia e meio ambiente <i>Claude Cohen</i>
<b>TD 186</b>	Agronegócio no Brasil: perspectivas e limitações <i>Carlos Enrique Guanzioli</i>
<b>TD 187</b>	The Monetary Transmission Mechanism in Brazil: Evidence from a VAR Analysis <i>Viviane Luporini</i>
<b>TD 188</b>	Experiências de desenvolvimento territorial rural no Brasil <i>Carlos Enrique Guanzioli</i>
<b>TD 189</b>	Conceitos de sustentabilidade fiscal <i>Viviane Luporini</i>
<b>TD 190</b>	Regulation school and contemporary heterodoxies <i>André Guimarães Augusto</i>
<b>TD 191</b>	Micro and macro relations in a monetary production economy <i>Carmem Feijó</i>
<b>TD 192</b>	Education and equality: a post-Rawlsian note <i>Celia Lessa Kesrtenetsky</i>
<b>TD 193</b>	Potential growth and structural changes: An analysis of the European case <i>Mario Amendola, Bernhard Böhm, Jean-Luc Gaffard, Lionel Nesta, Lionello F. Punzo, Francesco Saraceno</i>
<b>TD 194</b>	Uma análise das principais causas da queda recente na desigualdade de renda brasileira <i>Ricardo Barros, Mirela de Carvalho, Samuel Franco e Rosane Mendonça</i>
<b>TD 195</b>	Fiscal federalism as a political instrument – distinct experiences: United States of America and Brazil <i>Ruth Helena Dweck</i>
<b>TD 196</b>	Atividade Monetária entre 1964 e o Início de 1986 <i>Luiz Fernando Cerqueira</i>
<b>TD 197</b>	Expectativas, Déficit, Senhoriagem e Inflação <i>Luiz Fernando Cerqueira</i>
<b>TD 198</b>	La inversión directa de España en Brasil y América Latina <i>Ángeles Sánchez Díez</i>
<b>TD 199</b>	Exogeneity of Money Supply in Brazil from 1966 to 1985: Full Version <i>Luiz Fernando Cerqueira</i>
<b>TD 200</b>	Dinâmica da Inflação no Brasil, 1960-2005. <i>Luiz Fernando Cerqueira</i>
<b>TD 201</b>	Demanda por Moeda, Senhoriagem e Megainflação. <i>Luiz Fernando Cerqueira</i>
<b>TD 202</b>	Metodologia para a periodização endógena da taxa de inflação no Brasil e aproximação de seus modelos ARIMA, 1960 a 2005. <i>Luiz Fernando Cerqueira</i>
<b>TD 203</b>	La libertà di scelta nella sfera produttiva: l'impresa capitalistica e l'impresa autogestita. <i>Ernesto Screpanti</i>
<b>TD 204</b>	Notas Sobre a Produtividade Industrial <i>Carmem Aparecida Feijó e Paulo Gonzaga M. de Carvalho</i>
<b>TD 205</b>	Influência dos Processos Interativos no Desempenho Inovativo de Empresas Inseridas em Aglomerações Produtivas Intensivas em Conhecimento <i>Fabio Stallivieri, Marcelo Matos e Gustavo José Guimarães e Souza</i>
<b>TD 206</b>	Da Estruturação ao Equilíbrio Fiscal: uma análise das finanças públicas estaduais no governo FHC <i>Ana Paula Mawad e Viviane Luporini</i>
<b>TD 207</b>	Desenvolvimento Financeiro e Desigualdade de Renda: evidências para o caso brasileiro <i>Camille Bendahan Bemerguy e Viviane Luporini</i>

<b>TD 208</b>	Instabilidade Internacional e Hegemonia: notas sobre a evolução do Sistema Monetário Internacional <i>Mario Rubens de Mello Neto e Victor Leonardo de Araújo</i>
<b>TD 209</b>	Apontamentos para uma Teoria da Corrupção: uma visão a partir da Sociologia Econômica <i>Ralph Miguel Zerkowski</i>
<b>TD 210</b>	Filosofia da ciência e metodologia econômica: do positivismo lógico ao realismo crítico <i>Carolina Miranda Cavalcante</i>
<b>TD 211</b>	Imigrantes portugueses no Brasil a partir dos recenseamentos populacionais do século XX: um estudo exploratório <i>Hildete Pereira de Melo e Teresa Cristina Novaes Marques</i>
<b>TD 212</b>	Conteúdo de trabalho feminino no comércio exterior brasileiro <i>Marta dos Reis Castilho</i>
<b>TD 213</b>	Regulação ou Cooptação? A Ação do Ministério da Agricultura e Pecuária (MAPA) através das Câmaras Setoriais e Temáticas da Agricultura entre 2002 e 2006 <i>Carlos E. Guanzioli, Marco B. Ortega e Carlos Américo Basco</i>
<b>TD 214</b>	Reputação e Transparência da Autoridade Monetária e Comportamento da Firma Bancária <i>Gabriel Caldas Montes</i>
<b>TD 215</b>	Trabalho reprodutivo no Brasil: quem faz? <i>Hildete Pereira de Melo e Marta dos Reis Castilho</i>
<b>TD 216</b>	Metodologia de estimação do PIB trimestral utilizando procedimentos de cointegração e filtros de Kalman <i>Luis Fernando Cerqueira</i>
<b>TD 217</b>	An Approach for Testing Money Supply Exogeneity in Brazil Mixing Kalman Filter and Cointegration Procedures <i>Luis Fernando Cerqueira</i>
<b>TD 218</b>	Avaliação do Impacto da Alfabetização de Adultos sobre o Desenvolvimento Humano: Uma análise com dados secundários <i>João Pedro Azevedo, Gabriel Ulyssea, Rosane Mendonça e Samuel Franco</i>
<b>TD 219</b>	Impacto da Discriminação e segmentação do mercado de trabalho e desigualdade de renda no Brasil <i>Ricardo Barros, Samuel Franco e Rosane Mendonça</i>
<b>TD 220</b>	A recente queda na desigualdade de renda e o acelerado progresso educacional brasileiro na última década <i>Ricardo Barros, Samuel Franco e Rosane Mendonça</i>
<b>TD 221</b>	Efeitos da saúde na idade de entrada à escola <i>Danielle Carusi Machado</i>
<b>TD 222</b>	O papel do instituto da patente no desempenho da indústria farmacêutica <i>Samuel de Abreu Pessôa, Claudio Monteiro Considera e Mário Ramos Ribeiro</i>
<b>TD 223</b>	Pobreza como privação de liberdade: o caso da favela do Vidigal no Rio de Janeiro <i>Larissa Santos e Celia Lessa Kerstenetzky</i>
<b>TD 224</b>	Confusões em torno da noção de público: o caso da educação superior (provida por quem, para quem?) <i>Ricardo Barros et al.</i>
<b>TD 225</b>	Gastos públicos: investimentos em infra-estrutura no período pós-privatização <i>Artur Faria dos Reis</i>
<b>TD 226</b>	Legislação trabalhista agrícola e pobreza no Brasil: uma abordagem de custos de transação <i>Gervásio Castro de Rezende e Ana Cecília Kreter</i>
<b>TD 227</b>	Estimation of Brazilian Quartely GDP with cointegration methods and benchmarking processes by state space model <i>Luis Fernando Cerqueira</i>



<b>TD 228</b>	Dinâmica da Inflação no Brasil, 1960-2005 - uma sinopse <i>Luiz Fernando Cerqueira</i>
<b>TD 229</b>	Moeda, Inércia, Conflito, o Fisco e a Inflação: Teoria e Retórica dos Economistas da PUC-RJ <i>Carlos Pinkusfeld Bastos e Mario Rubens de Mello Neto</i>
<b>TD 230</b>	Economia Popular, Desenvolvimento Local e Cooperação: o caso da ENDA Brasil. <i>Hildete Pereira de Melo e Sônia Maria de Carvalho</i>
<b>TD 231</b>	A economia informal metropolitana: um estudo baseado na ECINF/IBGE. <i>Hildete Pereira de Melo e Leonardo Siqueira Vasconcelos</i>
<b>TD 232</b>	A industrialização brasileira nos anos 1950: uma análise da Instrução 113 da SUMOC <i>Ana Claudia Caputo e Hildete Pereira de Melo</i>
<b>TD 233</b>	Desenvolvimento Territorial rural no Brasil: uma polêmica <i>Carlos Enrique Guanzioli</i>
<b>TD 234</b>	Parametric Bootstrap for Unit Root Testing - Brazilian Evidence <i>Luiz Fernando Cerqueira</i>
<b>TD 235</b>	Um Aspecto da Subocupação por Insuficiência de Horas Trabalhadas: a análise do desejo de trabalhar horas adicionais <i>Danielle Carusi Machado e Ana Flávia Machado</i>
<b>TD 236</b>	Atributos escolares e o desempenho dos estudantes: uma análise em painel dos dados do SAEB <i>Roberta Loboda Biondi e Fabiana de Felício</i>
<b>TD 237</b>	Comportamento do mark up na indústria brasileira nos anos 1990: evidências empíricas <i>Carmem Aparecida Feijó e Luiz Fernando Cerqueira</i>
<b>TD 238</b>	A importância das cotas para a focalização do Programa Bolsa Família. <i>Ricardo Paes de Barros, Mirela de Carvalho, Samuel Franco e Rosane Mendonça</i>
<b>TD 239</b>	Sustainable tourism: basic income for poor communities. <i>Celia Lessa Kerstenetzky e Lionello F. Punzo</i>

