

Strategic diagnosis of rural populations

Diagnóstico estratégico de poblaciones rurales

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Abstract

The present project is part of an applied research carried out in the rural area called the southeastern micro-region of La Paz municipality in the state of Baja California Sur, which is formed by three towns: San Antonio, El Triunfo and El Rosario. The subject of study is the elaboration of a strategic diagnosis, which will emerge from an integrated study and will function as the foundation for the implementation of a future strategic plan containing proposals for alliances between the State, society, and the private sector, which allow economic, social and cultural development. The methodology used was the proposal of the Latin American and Caribbean Institute for Economic and Social Planning (ILPES) and the Economic Commission for Latin America and the Caribbean (CEPAL), presented by Silva Lira and Sandoval (2012). Additionally, Chiavenato's basic model of a Strategic Planning System was used in its first stage, competitive and operational knowledge, that is, its implementation is not included. Different tools were applied, such as interviews, questionnaires, sessions, etc., analyzing the information with the SPSS software and as a result, the Strategic Diagnosis is presented.

Development, Diagnosis, Tools

Resumen

El presente trabajo es parte de una investigación aplicada realizado en la zona rural llamada micro región sureste del municipio de La Paz en el estado de Baja California Sur, formada por tres poblados San Antonio, El Triunfo y El Rosario. El objeto de estudio es la elaboración de un diagnóstico estratégico, donde surgirá de un estudio integrado y servirá de base para la realización de un futuro plan estratégico que contenga propuestas de alianzas entre el Estado, la sociedad y sector privado que permita el desarrollo económico, social y cultural. Como metodología se utilizó la propuesta de Instituto Latinoamericano y del Caribe de Planificación Económica y Social (ILPES) y la Comisión Económica para América Latina y el Caribe (CEPAL), presentada por Silva Lira y Sandoval (2012). Así también, se recurrió al modelo básico del Sistema de Planeación Estratégica de Chiavenato, en su primera etapa, el conocimiento competitivo y operacional, es decir, no se incluye la implementación de este. Se aplicaron diferentes herramientas, como entrevistas, cuestionarios, sesiones, etc., analizando la información con el software SPSS y como resultado se presenta el Diagnóstico Estratégico.

Desarrollo, Diagnóstico, Herramientas

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Introduction

In several regions of the United Mexican States, the social, economic, and cultural development has been heterogeneous throughout its history. Similarly, the welfare indicators, particularly in terms of education, health, infrastructure and industrialization show ancient and profound imbalances.

The problem of the inequitable progress of the regions constituting the Republic covers two dimensions: the first one is the pronounced inequality (demographics, employment, and productivity, among others) in the northern, central and southern macro-regions, and the Gulf and Pacific coastlines. The second one corresponds to the micro- regions, which present conditions of economic and social disadvantage in every State. Undoubtedly, as stated in the National Development Plan 2013-2018 (PND), any strategy capable of boosting the regional economy must take a stand against both challenges.

Although rural areas exist, “rural” does not necessarily imply poverty, since even between adjacent regions there are remarkable contrasts in the quality of life of its inhabitants. Provided that a segment of the rural economy is strongly linked to agriculture, fishing and forestry, other rural areas have diversified their economy towards the manufacturing and service sectors. On the other hand, there are tourism-oriented rural areas, and many others containing untapped natural and cultural resources.

The described situation evidences that Mexico must conduct transcendental transformations and face several challenges with regards to rural policy in order to abolish the manifested social gaps; these include: 1) reduction of rural poverty, 2) provision of basic utilities, 3) reinforcing and diversification of rural economy, and 4) better exploitation and preservation of underused cultural, natural and energy resources (OCDE, 2018).

Baja California Sur (BCS) is located in the northwest of Mexico with a territorial extension of 73,909 km² which represents 3.8% of the national area with a population of 637,026 inhabitants distributed into its five municipalities, and it has a privileged geographic and oceanographic area concentrating 23.3% of the country's coastlines.

Moreover, it possesses a wide marine biodiversity and exceptional natural resources. The geographical position and its natural resources are factors that influence the opportunities to increase competitiveness and productivity through development strategies that promote the regional strategic sectors.

According to the Official Gazette of the Federation (DOF), the state of BCS possesses a relative marginalization index due essentially to the effect exerted by the county seats over the rural areas; in that sense, the state manifests a different behavior from the rest of the country, which shows a higher degree of marginalization. The predominant economic sector in the state is the tertiary sector, which constitutes 7.2% of the state's Gross Domestic Product (PIB) (INEGI, 2019), and the working population is grouped in this economic sector.

The communities of El Rosario, El Triunfo and San Antonio form the Southeastern Micro-region of La Paz Municipality; these are structured into groups of families creating support networks in order to solve their own problems, usually related to jobs and services. Such communities tend to settle primarily through grassroots organizations (clubs, community groups, common land, etc.).

The local government must design and execute collaborative programs between social activities and participatory activities that benefit an appropriate organization and distribution of the available resources; thus, better economic conditions will be generated for the manufacturers, entrepreneurs and the inhabitants of these communities.

The local government also prioritizes the innovation in the public policies to incorporate research, science and technology in the design of specific business support programs, in such way that the applied research contributes to the development of technologies and innovation aimed to create new products, processes or services.

Unquestionably, one of the options for growth and generation of capital gains in any public or private organization is the sustainable growth, which constitutes a very important challenge for being the support that allows citizens to have a dignified life.

Nowadays, the local governments demand a vigorous economic system, productive and reliable, which considers the equitable and sustainable use of resources to fully satisfy the needs of the population. Therefrom, if a micro-region wishes to be competitive it must execute actions that boost its economic growth.

By reviewing the state of the art carried out for this research, it is deduced that the organizations drawing up plans are those registering the highest performances, thereby they have a greater chance of success than such others that do not draw up projects. Therefore, the integration of a strategic diagnosis for the micro-region will emerge from an integrated study and will be used as a foundation for the implementation of a future strategic plan containing proposals for alliances between the State, society and the private sector to promote or enhance the socio-economic development and the efficient use of the region's natural resources.

The three rural communities to the southeast of La Paz municipality in the State of Baja California Sur has alternately experienced periods of prosperity and decay. Nowadays, the sustainable regional development is a concern within the state and municipal contexts. The lack of a long established mining activity has completely stopped the economic development given that mining was the region's natural labor.

The localities present a medium low degree of marginalization, and as a result of not having intended objectives for a strategic planning, which promotes the economic and social development, the micro-region is experiencing the collateral effects of this omission, such as poverty, population dispersion and even a technological gap.

As an alternative solution for their development, those three communities may have the foundation for a future strategic planning that guides and organizes the efficient use of their natural and economic human resources through a strategic diagnosis that allows the assessment of internal and external factors, in order to establish strategic objectives that contribute to the physical, social, productive and cultural integration.

Research methodology

The methodological design that was used results from the research of different strategic planning theories, all of them focused on business organizations. For this reason, it was necessary to find a methodological combination, in which all factors that influence its economic development were considered, in order to apply it to the micro-region. Therefore, the proposal of the Latin American and Caribbean Institute for Economic and Social Planning (ILPES) and the Economic Commission for Latin America and the Caribbean (CEPAL), presented by Silva Lira and Sandoval (2012) is of utmost importance. Similarly, Chiavenato's basic model of Strategic Planning System was used, which was the result of comparing the revised theories and their suitability for the region to study the qualities, characteristics and important patterns of the micro-region. Subsequently, a strategic diagnosis will be developed, adapted to the needs of the selected region object of this research.

Phases	Content	Tools/ Techniques	Results
First phase	Profile of the micro-region	Documentary research	Importance of the micro-regional planning Historical background Definition of the micro-region
Second phase	Micro-regional diagnosis (Internal and external analysis of the environment)	Interviews, Observations, Questionnaires Potential matrix, limitations and problems. SWOT Analysis	Demographic structure Review of expectations of internal and external interests Current situation Productive labor
Third phase	Definition of strategic objectives		Micro-regional strategic objectives boosting the development

Table 1 Methodological design for the strategic diagnosis
Source: Own elaboration, based on Silva Lira and Sandoval (2012)

Due to the homogenous population type, the sample will be small and stratified. To determine the size of the sample, the statistic formula for finite population was used (less than 500,000 elements). To estimate the sample, a confidence level of 95% was considered, with a standard error of 5%. The population being considered are those inhabitants over 18 and under 65 years old; which is 469 people; giving a total of 211 people.

Sample	Percentage of population	Sampling per area
El Rosario	1%	3
El Triunfo	42%	88
San Antonio	57%	120
Totals	100%	211

Table 2 Distribution of sample
Source: Own elaboration

The Operationalization of variables is as follows:

Strategic diagnosis. The external environment is considered (it studies the factors and external forces, its relationships, effects and potentials) and the internal (considers the organization's resources) where its limitations are detected (Chiavenato 2011). As an operational definition, it determines the Strengths and Weaknesses of the organization's fundamental resources. It allows estimating the importance of such Strengths and Weaknesses through Threats and Opportunities derived from the environment.

They are measured through interviews and questionnaires. Methodology (Silva Lira & Sandoval, 2012).

The dimensions considered are Political Aspects (regulations and common land stability, common land organization, projects on the state), Economic Aspects (main economic activities, resource access, level of development); Social Aspects (lifestyles, consumption habits, cultural level) and Technology and Infrastructure Aspects (integration of technology, services offered).

Three data collection instruments were developed: the interview, observation guide and a questionnaire.

The unstructured interview was designed to be applied to each one of the town's regional representatives and deputy regional representatives. As referred by Ríos and Ramirez (2017), these type of interviews are not guided by a rigid model, since they accept a certain degree of freedom to pose questions and answers, but by basic guidelines to not deviate from the objective, and what is important is to obtain a broad picture of the data.

The verification and observation list has as a foundation the document developed by Silva Lira and Sandoval (2012); for purposes of this research, the previously mentioned document was adapted or localized to be used in the localities of the micro-region.

Similarly, a questionnaire was developed, which was subjected to a validation process before a panel of experts in the different areas related to the research. The questionnaire consists of 22 affirmations with the Likert scale regarding five dimensions: a) The first one refers to the political aspects and consists of 6 items measuring the regulations, common land stability and the localities' projects; b) The second one is the economic aspect and consists of 5 items measuring the resource access and main economic activities; c) The third one is the social aspect measuring consumption habits and lifestyles; d) The fourth one is the technological aspect and it consists of one item measuring the integration of technology; and e) The infrastructure, consists of 4 items measuring the localities' infrastructure. Both are merged in the previous table.

To obtain the reliability from the previous measurement instrument, a pilot test was performed to 5% of the population (a small sample), in other words, to 10 people. Hernández, Fernández and Baptista (2010) mention that pilot tests are applied to people with similar characteristics to those of the sample or target population. Taking the pilot test as a reference, it was found that the instructions are clear and understandable, such being the reason why the 22 questions were not modified, since the items worked correctly.

In addition, with the SPSS program, the document's level of reliability was estimated, which got a Cronbach's Alpha scale score of .808, indicating that results will be consistent and coherent.

The information analysis for the applied questionnaire was performed through the data matrix from the IBM SPSS Statistic (SPSS, 2011). The statistical data of frequency was analyzed for each one of the variables and a display thereof was presented through graphics and tables exported to Excel, as well as their respective definition and interpretation.

Results

Hereunder, a matrix of potentials, limitations and problems is presented, which arises from the applied instruments in the localities, such as the semi-structured interviews performed to the regional representative and deputy regional representative, the questionnaires and the verification list, in which the aptitude or capacities of the micro-region will emerge from each variable to achieve its development. Understanding that potentials are all of those human, technological, economic, financial, sociocultural and other factors that can be used more effectively to encourage the local development, limitations represent those factors and situations that hinder development of potentials.

Technological and Infrastructure	Remodeling and restoration of old buildings with foreign investment Strategic location for commercial and tourist traffic New technologies for the development of local products and domestic use.	Lack of transportation, medical services, potable water Few municipal support for local development High cost of properties Access roads	Some accesses are impassable roads in rainy season
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Table 3 Matrix of potentials, limitations and problems
Source: Own elaboration

This SWOT analysis is part of a comprehensive study of the state of the art of three rural localities in the Southeast of the State of Baja California Sur and their current situation. Said analysis results from the applications of the measurement instruments as well as from the Matrix of potentials, limitations and problems; in such way, all situations that positively influence the achievement of objectives and that can be controlled are the strengths; on the other hand, everything that has a negative influence but that somehow can be controlled are the weaknesses; all positive and uncontrolled situations are understood as opportunities; and the threats are all of those external factors that have a negative influence, considering the information contained in the municipal plans and the characteristics of the local and regional context.

All these factors have been taken into account, and as argued by Chiavenato (2011), in addition to the external and internal diagnosis, it is necessary to define the premises and weigh the events in order to visualize the possible future consequences with the purpose to minimize the inherent risks of decision-making.

Aspects	Potentials	Limitations	Problems
Political	Proper functioning of the local authority Support from educational institutions for the development of sustainable plans and programs Support from non-profit organizations	Lack of incentives for project development Lack of development goals	Low-level coordination
Economic	Entrepreneurs with vision Network of artisan producers Encourage social innovation programs Development of regional and foreign tourism Use of natural and historical resources; rural tourism, ecotourism.	Shortage of some services (infrastructure) Indifference of some inhabitants Lack of financial support Poor training Lack of entrepreneurial spirit Low-skilled jobs and low pay.	Informal employment The services offered are very scarce and of poor quality.
Social	Population willing to receive orientation and training Population with cultural identity Improve the population's standard of living.	Lack of training options and orientation Little diffusion of the population's cultural identity Little support for jobs and entrepreneurship	Low educational level

		Internal Analysis of the Micro-region	
		Strengths	Weaknesses
SWOT MATRIX OF THE SOUTHEAST MICRO-REGION OF BAJA CALIFORNIA SUR		Cultural identity Interaction between its inhabitants and leaders to create economic development. Towns with Historical Heritage Natural and historical attractions as a tourist destination Attractive craft production processes (product demand) Regional Cuisine Flora and fauna	Shortage of services (transportation, ICT; telephone, emergency, lodging, food) (quality and quantity) Youth migration Poor development in production Lack of interest of some inhabitants. Low-skilled jobs and low pay. Water pollution Not accesible high school education
	EO	Opportunities Network of services between populations Entrepreneurs for an increased production and distribution of products Increased environmental awareness in economic activities and in everyday life. New technologies for the development of local products and domestic use. Support from non-profit organizations and educational institutions for the development of sustainable plans and programs.	WO (overcome weaknesses and seize opportunities) Encourage the connection with the three communities of the micro-region for the formation of a Network of cultural tourism services. Encourage the use of ICTs, as well as the training of residents.

Threats	ST (Use strengths to deal with threats)	WT (Seek support for entrepreneurs from the Ministry of Economy Conduct training and create constant interest in the inhabitants. Conduct better services for the micro-region.)
Consequences of the country's economic crisis. Policy discontinuity in local development Other towns with the Magical Town category/ competition in artisan products and easy access through the 4-lane road Water pollution Product quality requirement Lag of the microregion	Encourage the interest of the historical heritage and natural resources of the localities as tourist attractions. Conduct municipal and government support for the growth of the micro-region.	

Table 4 Matrix of Strengths, Opportunities, Weaknesses and Threats

Source: Own elaboration

As mentioned above, the rural communities are located on the border of a protected natural area and their natural resources represent a great opportunity to try to diversify their rural economic activities towards a green economy. They are distinguished by their historical heritage and biodiversity. Culture and heritage constitute an axis of cooperation between the localities, which may form a very active service network that allows them to redirect a new course for their economy, mainly through tourism and the sale of local artisan products.

Regarding transportation, the transpeninsular highway is the only access that connects them; this allows strengthening the interconnection between such localities, as well as with the state capital and other southern towns without this having consolidated an economic development in the micro-region.

Transportation remains a pending task; well- maintained rural roads are known to favor commercial transactions. However, there are rural roads between the communities that are difficult to access by car, and the only way to get there is by foot or with pack animals.

The isolation, derived from the limited access to communication routes, as in the case of El Rosario, aggravates the negative effects of the population's dispersion.

Geographically speaking, the communities, in particular El Rosario which is the least populated, is deficient in all services and also the most remote compared to San Antonio and El Triunfo, which foster the elderly population and the economically active population without employment and limited resources. One of the challenges of the micro-region is to guarantee the maintenance of the population and economic activity in those localities implementing actions in terms of service, constitution of companies and employment creation to overcome social inequalities and poverty.

Although of poor quality, possibilities to access phone lines and internet are more notorious at El Triunfo and San Antonio since the service exists, but at El Rosario, this is completely unavailable. The applications are much more developed in micro or small companies. It should not be forgotten that application domains are increasingly numerous and common and they constitute a key role in the development of localities. The ICTs offer is a major growing sector and allows a response to the development of rural areas, enabling them to improve their quality of life and competitiveness.

It is evident that there are significant local resources that should be valued in order for the positioning of the relevant sectors to be strengthened, anticipating changes and incorporating innovation and new technologies in companies. It is important to promote a balanced and environmentally sustainable development between the most attractive areas and those less developed or with difficulties.

Cooperation of different non-profit organizations and universities will allow leveraging innovation in different localities, while the research and its results will lay the foundations for the formation of service networks and clusters.

The strategic objectives that emerged from the SWOT analysis for the three localities are listed below:

1. Encourage the collaboration with the three localities for the formation of a cultural-tourism services network.
2. Encourage the use of ICTs as well as the training of inhabitants.
3. Encourage the interest of the historical heritage and natural resources of the localities as tourist attractions.
4. Conduct municipal and government support for the growth of the micro-region.
5. Encourage the population to undertake provision of services, distribution and production of artisan products.
6. Conduct support form non-profit organizations and educational institutions for the development of sustainable plans and programs.
7. Conduct better services for the micro-region.

Conclusions

Based on the results, it is concluded that according to the research problem approach, it was possible to obtain a document containing the strategic diagnosis, in which both the external and internal context of the three localities were analyzed, emphasizing the strategic objectives. Such diagnosis is the essential preliminary stage to subsequently develop a strategic planning including viable and possible alternatives in order for the micro-region to direct its efforts towards its development. Therefore, the general and specific objectives set out in this research were effectively fulfilled. Undoubtedly, literature reviewing was very useful for a better understanding and structuring of the ideal model in order to integrate the diagnosis subject of this research. In chapter III, the Methodology for the Elaboration of Local Development Strategies from the Latin American and Caribbean Institute for Economic and Social Planning (ILPES) and the Economic Commission for Latin America and the Caribbean (CEPAL) (Silva Lira and Sandoval, 2012), was merged with Chiavenato's Basic Model of Strategic Planning System, only considering the internal and external diagnosis, without reaching the development of strategies, their implementation or monitoring.

As a result from the analysis carried out on the internal and external factors obtained through the application of the data collection instruments: the Observation guide, Interviews and Questionnaires, it is concluded that:

Political aspects: The towns' authorities and their regulations are considered good, but it is essential that local authorities continue their administrative management functions and even seek the participation of social calls for the development of their communities. Their attractions have enough potential to reactivate tourist inflow.

The change agents that should be in charge of promoting the development process affirm (Silva Lira & Sandoval, 2012) they are both public and private and they are basically summarized in local authorities, universities, business chambers, training centers, local development agencies and others. It is important they go through some confidence-building processes that will enhance their actions.

Economic aspects: Economic activities are not sufficient and they can adapt to new methods to increase their economic development. The area of the three communities is not very extensive and it is distinguished by its historical heritage and biodiversity. Culture and heritage constitute an axis of cooperation between localities, which enables the implementation of service network strategies, production and distribution of its services. Information flow is important in order for the costs to be reduced, and the provision of services and sale of good quality artisan products for the economic, social and cultural development of the area to be achieved. It is urgent to offer a tourist service in a good quality environment, in which the inhabitants contribute their points of view, and the technical, social and environmental aspects are included in these considerations, in order to generate sustainable tourism services for the region. Regarding the production of artisan products, the making and marketing of regional and stationary consumer products should be encouraged, sufficient and attractive, taking care of presentation and packaging details.

(Silva Lira & Sandoval, 2012) claim that starting from the conviction that possibilities of local development are based on the feasibility of exploiting the potential of endogenous resources of a given territorial space, a key issue to work on is using it and activating it, by a possible set of local change agents that intend to achieve certain development objectives that, generally expressed, can be summarized among others, in the constitution of companies and creation of jobs, technological innovation, cooperation networks, training of human resources and social development.

Social aspects: Training and advice are extremely important. From this derives the urgent need to promote, support and strengthen the training and advice of the inhabitants who show a great interest in undertaking new activities that generate benefits and hope for sustainable development.

(Silva Lira & Sandoval, 2012) add that the way of understanding successful local development processes is fundamental, since they are associated with the "existing degree of confidence between the social actors of a society, civic behavior norms practiced, and the degree of associativity which characterizes them.

Technological aspects and infrastructure: It is a priority to compensate for the lack of services. The local, municipal and state authorities must take decisive actions so that an economic reactivation of the area really emerges. The ICTs offer is a major growing sector and allows a response to the development of rural areas, enabling them to improve their quality of life and competitiveness. Similarly, the promotion of information technologies will allow greater learning and optimization of time and costs. The commitment and participation of inhabitants is also required, which includes the training and specialization of the workmanship, provision of physical spaces and infrastructure for the execution of some actions proposed by the inhabitants. To this effect, it would be useful to take advantage of the approaches that already exist between non-profit organizations and higher education institutions and carry out the necessary arrangements to obtain the necessary support in the preparation of architectural plans for renovations, regional development and others.

The strategic diagnosis product of this research was designed to understand the internal and external context of the studied areas, and thus, being able to propose strategic objectives to design the respective strategic planning with the goal of promoting economic development among the three communities.

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